

Notice of Cabinet

Date: Wednesday, 4 February 2026 at 10.15 am

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



Membership:

Chairman:

Cllr M Earl

Vice Chairman:

Cllr M Cox

Cllr D Brown
Cllr R Burton
Cllr A Hadley

Cllr J Hanna
Cllr R Herrett
Cllr A Martin

Cllr S Moore
Cllr K Wilson

All Members of the Cabinet 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.bcpCouncil.gov.uk/ieListDocuments.aspx?MIId=6071>

If you would like any further information on the items to be considered at the meeting please contact: Sarah Culwick (01202 817615) on 01202 096660 or email democratic.services@bcpCouncil.gov.uk

Press enquiries should be directed to the Press Office: Tel: 01202 118686 or email press.office@bcpCouncil.gov.uk

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

AIDAN DUNN
CHIEF EXECUTIVE

27 January 2026

**DEBATE
NOT HATE**



Available online and
on the Mod.gov app

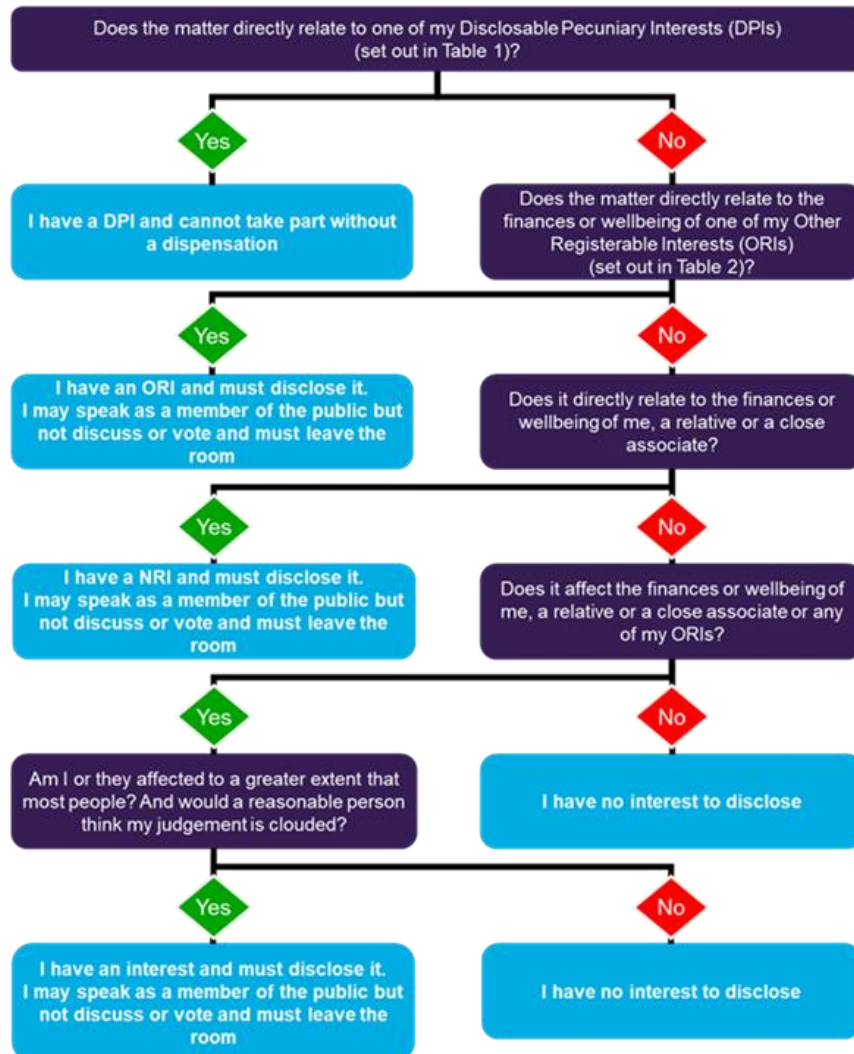


Maintaining and promoting high standards of conduct

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

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. 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.

3. Confirmation of Minutes

To confirm and sign as a correct record the minutes of the Meeting held on 14 January 2026.

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4. 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 mid-day on Thursday 29 January 2026 [mid-day 3 clear working days before the meeting].

The deadline for the submission of a statement is mid-day on Tuesday 3 February 2026 [mid-day the working day before the meeting].

The deadline for the submission of a petition is Tuesday 20 January 2026 [10 working days before the meeting].

5. Recommendations from the Overview and Scrutiny Committees

To consider recommendations from the Overview and Scrutiny committees on items not otherwise included on the Cabinet Agenda.

ITEMS OF BUSINESS

6. Council Budget Monitoring 2025/26 at Quarter Three

13 - 50

This report provides the quarter three 2025/26 projected financial outturn information for the general fund, capital programme, housing revenue account (HRA) and Dedicated Schools Grant (DSG).

The quarter three position is a projected overspend for the general fund of £4.6m (compared with £4.2m at quarter two) largely due to increased demand for adult and children social care with some offset from the central contingency and budgets in the Resources directorate.

7. Housing Revenue Account (HRA) budget setting 2026-27	51 - 82
<p>The Housing Revenue Account (HRA) is a separate account within the council's budgets that ring-fences the income and expenditure associated with council housing.</p> <p>This report sets out the proposals regarding increases to rents, service charges and other charges to tenants and leaseholders. Arrangements for these increases are separate to arrangements for increasing fees elsewhere in the council and are set out in law and regulation.</p> <p>The report also sets out plans for expenditure on services to residents, repairs and improvements to homes and the provision of new homes taking into account new legal and regulatory requirements.</p> <p>This report also demonstrates how council housing and spending within the HRA supports the council's corporate strategy and objectives.</p>	
8. Revised Local Validation Checklist	83 - 196
<p>This report sets out the background to local validation lists including what they are, the necessity for every local planning authority to have one and the importance of it being regularly reviewed, kept up to date and tailored to current local planning policy.</p> <p>The national requirements for the content of a planning application are prescribed by legislation and are limited to a small number of documents and other supporting information which is mandatory. For this reason, legislation also enables local planning authorities to go further and supplement the national requirements with their own local requirements in the form of a 'local validation list' (sometimes referred to as a 'local validation checklist'). Once a local validation list has been adopted and published it is legally binding; an applicant is then obliged to submit the information set out in the local validation list when the application is first submitted and if they do not, the council can refuse to validate the application until that information is provided.</p>	
9. Our people and communities: Subsidised Bus Services Review	197 - 266
<p>During 2025/26 financial year the council will spend over £1.59m supporting subsidised bus services from a combination of council derived revenue budget and external grants. By 2027/28 the cost is forecast to exceed £2.0m. Continuing to fund the subsidised network in its current form is not sustainable.</p> <p>This report presents recommended changes to the network informed by a performance review including public consultation. The recommendation has been developed in partnership with morebus (main enhanced bus partnership operator).</p> <p>Whilst undertaking the review the council has engaged with the Department for Transport (DfT) Bus Reform Team throughout to ensure that the recommended revised subsidised network is eligible to be funded from the recently announced £2,621,127 Local Authority Bus Grant (LABG) 2026/27 revenue allocation.</p> <p>A report setting out the full planned investment of both the revenue and capital LABG allocations shall be presented to Cabinet in March 2026.</p>	

10.	School Admissions Arrangements 2027/28	267 - 296
<p>BCP Council is responsible for administering admission arrangements for its community and voluntary controlled schools. There is a legal requirement to determine the arrangements annually as described in the School Admissions Code 2021 and associated legislation.</p> <p>The local authority must also formulate and publish a scheme to coordinate the admission arrangements for all publicly funded schools within their area for the 2027/28 academic year.</p> <p>A public consultation on the proposed 2027/28 admission arrangements was held on from 10 November 2025 until 22 December 2026. The proposed change is a reduction to the Published Admission Number at Burton CE Primary School to reflect the broader trend of fewer families seeking school places in the area due to falling birth rates.</p> <p>It is recommended that the arrangements are determined by council members.</p>		
11.	Early Years and Mainstream Schools Funding 2026/27	297 - 310
<p>This paper outlines the proposed 2026/27 local mainstream schools funding formula based on recommendations from the Schools Forum.</p> <p>The formula is highly regulated by the Department for Education (DfE), with funding provided by the £293m schools block of the ring-fenced dedicated schools grant (DSG).</p> <p>The proposed local mainstream formula is to replicate the national funding formula (NFF) with minor amendments as recommended by Schools Forum on 19 January 2026 to reflect that it is not affordable in full.</p> <p>The early years single funding formula (EYSFF) is being considered by Schools Forum on 16 February 2026 to allow time for a full consultation process with providers.</p>		
12.	Hawkwood Road Phase 2 update	311 - 326
<p>This report provides an update on Hawkwood Road, which is a priority project for the Boscombe Towns Fund. In February 2025 Council, resolved to approve the funding strategy for a mixed-use residential-led scheme with a clinical facility in collaboration with the NHS (Option 1).</p> <p>The Cabinet recommendation to Council included an obligation to have a contract in place with the NHS prior to award of the build works contract for the main construction. Despite a Memorandum of Understanding between the NHS and BCP Council being signed in December 2024 and best endeavours, a final contract has not been entered into with the NHS. To maintain delivery, this report seeks authority to proceed to award the build contract for the main construction to ensure that the grant milestones for the Towns Fund programme and Homes England are satisfied and thereby safeguard the total grant of £17.3m.</p> <p>This will allow for continued discussions with the NHS and ensure that the significant social and physical regeneration to the ward of Boscombe West</p>		

and the local need is not lost.

There is a continued commitment to have a health provision at Hawkwood Road, but in the event the NHS cannot proceed, this report seeks authority to market the property as general commercial use as the preferred alternative strategy now due to funding timelines being unachievable for a new residential scheme which would require planning. The 100% residential scheme (Option 2 in the previous Cabinet report) would require a new design and planning application and tender, which is likely to result in higher pricing and therefore is not deliverable within the immediate need to start on site in 2026/2027 and deliver by 2028/2029.

[PLEASE NOTE: Should Cabinet wish to discuss the detail of the confidential appendices at Appendix 1 and 2 the meeting will be required to move into Confidential (Exempt) Session].

13. Exclusion of Press and Public

In relation to the item of business appearing below, the Committee is asked to consider the following resolution: -

‘That under Section 100(A)(4) of the Local Government Act 1972, the public be excluded from the meeting for the following item of business on the grounds that they involve the likely disclosure of exempt information as defined in Paragraph 5 in Part I of Schedule 12A of the Act and that the public interest in withholding the information outweighs such interest in disclosing the information.’

14. Christchurch Business Improvement District

327 - 382

Christchurch Business Improvement District's (BID) first 5-year term will finish in October 2026. The BID is currently preparing for a new ballot on 2nd July 2026 for a second term. This report seeks Cabinet approval to allow Christchurch BID to go to ballot for a second term.

15. Urgent Decisions taken by the Chief Executive in accordance with the Constitution

The Chief Executive to report on any decisions taken under urgency provisions in accordance with the Constitution.

16. Cabinet Forward Plan

To Follow

To consider the latest version of the Cabinet Forward Plan for approval.

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.

BOURNEMOUTH, CHRISTCHURCH AND POOLE COUNCIL
CABINET

Minutes of the Meeting held on 14 January 2026 at 10.15 am

Present:-

Cllr M Earl – Chairman

Cllr M Cox – Vice-Chairman

Present: Cllr D Brown, Cllr R Burton, Cllr A Hadley, Cllr J Hanna,
Cllr R Herrett, Cllr A Martin, Cllr S Moore and Cllr K Wilson

Also in attendance: Cllr P Canavan (Chair of the Health and Adult Social Care Overview
and Scrutiny Committee), Cllr G Farquhar and Cllr T Slade

Also in attendance
virtually: Cllr K Salmon (Chair of the Overview and Scrutiny Board)

104. Declarations of Interests

Councillor Millie Earl declared a non-pecuniary interest in Minute No. 110 (Two Riversmeet Studios) as a BCP Leisure member in Poole and remained present for the discussion and voting thereon.

105. Confirmation of Minutes

The Minutes of the meeting held on 17 December 2025 were confirmed and signed as a correct record.

106. Public Issues

Cabinet was advised that there had been no petitions or questions submitted by members of the public on this occasion, but that one statement had been submitted in relation to Minute No 108 (Council Tax – Tax base 2026/27) and this is set out below.

Public Statement

Public Statement from Darren Pidwell, Chair of the Mudeford Sandbank Beach Hut Association (MSBHA) on Agenda Item 6 (Council Tax – Tax base 2026/27)

We are frustrated that BCP Council are again targeting Mudeford Sandbank hut owners to raise additional revenue and with no prior consultation. Annual costs will rise by 24%, to £5200 pa, doubling since April 2023. For many, this will become a significant financial burden.

This is additional to the 2023 harmonisation increases, when we were told that a significant proportion of that money raised would be invested into beach facilities. None happened, the infrastructure is now almost untenable.

The huts have no mains water, electricity or sanitation. Public toilets and standpipes have to suffice. They can be occupied for only 8 months of the year. How can these be considered as “homes”? What is the legal basis for Council tax?

We recognise the Council’s difficult financial position, but further penalising hut owners is no longer fair or viable. This proposal must therefore be rejected.

107. Recommendations from the Overview and Scrutiny Committees

Cabinet was advised that one recommendation had been received from the Overview and Scrutiny Board on items not otherwise indicated on the Cabinet agenda.

The Chair of the Board, Councillor Kate Salmon presented the recommendation from the Board as set out below, copies of which had been circulated to Members of the Cabinet and published on the Councils website prior to the meeting.

Recommendation from the Overview and Scrutiny Board Meeting held on 5 January 2026

O&S Board agenda item 8 Regeneration Progress Report

The Overview and Scrutiny Board recommend to Cabinet that, to enable effective lobbying of Government in the future, the draft of the BCP Growth Plan be shared with O&S Board Members when available and that Overview and Scrutiny be embedded in the plan’s development and approval process.

(Majority Decision)

The Leader thanked Councillor Salmon and the Board for bringing their recommendation to Cabinet and advised that she was minded to accept the recommendation and that a formal response would be provided to the Board.

108. Council Tax - Tax base 2026/27

The Portfolio Holder for Finance 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.

Cabinet was advised that the report calculated and presented the proposed council tax base for council tax setting purposes in line with current legislation and guidance.

In presenting the report the Portfolio Holder provided an explanation of how the base was calculated.

Members of the Cabinet spoke in support of the report highlighting the difficult financial situation of the Council and the importance of maintaining the same level of council tax support scheme.

Further to this Cabinet acknowledged the representations received in relation to the Mudeford Beach Huts and the increased council tax charges for hut owners.

RECOMMENDED that Council approves: -

- (a) the report for the calculation of the council's tax base for the year 2026/27 and recommends the tax base to Full Council; and**
- (b) pursuant to the report, and in accordance with the Local Authorities (Calculation of Council Tax Base) Regulations 1992, as amended, the amount calculated as the council tax base for Bournemouth, Christchurch and Poole Council for 2026/27 is 152,481.7**

Voting: Unanimous

Portfolio Holder: Finance

Reason

The Council is required by the Local Authorities (Calculation of Tax Base) Regulations 1992, as amended, to calculate the council tax base for the financial year 2026/27.

109. Housing and Property Compliance Update (Housing Revenue Account)

The Portfolio Holder for Housing and Regulatory Services 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.

Cabinet was advised that the report provided performance information setting out how the council meets its responsibilities in ensuring that all council housing within the Housing Revenue Account is managed in a way that meets compliance with current health and safety legislation, best practice and regulatory standards to ensure the health and safety of residents, and that it also sets out issues concerning compliance and demonstrates how these are being managed.

Further to this Cabinet was informed that the report included an update on Damp and Mould, Decent Homes, Housing Health and Safety Rating System (HHSRS), Stock Condition and an internal Compliance Audit as part of a commitment to keep Cabinet informed on a quarterly basis on BCP Homes matters.

Cabinet members expressed thanks to officers for their work on this particularly in regard to dealing with issues of damp and mould.

RESOLVED that Cabinet noted the compliance information provided which details how the council is performing against statutory building compliance and property related matters on its council housing.

Voting: Unanimous

Portfolio Holder: Housing and Regulatory Services

Reason

The council, as a landlord, has many legal obligations it must satisfy to ensure the health, safety and welfare of its tenants and leaseholders. It must also adhere to the regulatory standards as set out by the Regulator of Social Housing, particularly the Safety and Quality Standard.

Councillors should also have oversight and assurance of compliance against the legal and regulatory requirements that are placed upon it through this annual report to Cabinet.

110. Two Riversmeet Studios

The Portfolio Holder for Destination, Leisure and Commercial Operations 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.

Cabinet was advised that the report detailed the feasibility and financial considerations for capital borrowing to fund a two-storey extension to Two Riversmeet Leisure Centre (2RM) to address the identified need for dedicated studio space in Christchurch, and that the investment aimed to enhance the centres health and fitness offer, increase membership and income whilst supporting community wellbeing and aligning with the Councils corporate strategy.

Councillor Patrick Canavan addressed the Cabinet questioning the priorities of the Cabinet and whether this was an essential choice, the timing of the report and the appropriateness of the involvement of the Audit and Governance Committee.

In relation to this the Chief Financial Officer advised that there was a requirement for such recommendations to go to the Audit and Governance Committee in order for them to be satisfied with the project and assured of the ability to pay back additional prudential borrowing.

Cabinet members spoke in support of the recommendations and of the important investment highlighting that the investment would subsequently generate the additional income to cover the borrowing and that the scheme was in effect a stand-alone scheme.

Further to this Cabinet members emphasised the need to invest in all of the council leisure centres in the future.

RECOMMENDED that Council: -

- (a) agrees to option 2 approving the building of a two-storey facility extension at Two Riversmeet Leisure Centre (2RM) creating two brand new multi-use studios costing £1.8m, subject to planning permission;**
- (b) notes the detail in the financial and legal implications; and**
- (c) delegates to the Director of Commercial Operations in consultation with the Portfolio Holder for Destination, Leisure and Commercial Operations, the implementation of this decision.**

It is RECOMMENDED that Audit and Governance Committee recommend to Council: -

Approval of an increase in the authorised borrowing limit of the Council to accommodate the £1.8m financing for the extension at Two Riversmeet Leisure Centre proposal.

Voting: Unanimous

Portfolio Holder: Destination, Leisure and Commercial Operations

Reason

Enhancing 2RM Leisure Centre with dedicated studio space will allow for the centre under BCP Leisure to grow and develop enhancing the financial position by giving a fresh dedicated offer within Christchurch. The project aligns with the corporate strategy ensuring people can be active and healthy maximising opportunities for our communities.

Councillor Millie Earl declared a non-pecuniary interest in this item as a BCP Leisure member in Poole and remained present for the discussion and voting thereon.

111. Urgent Decisions taken by the Chief Executive in accordance with the Constitution

Cabinet was advised that no urgent decisions had been taken in accordance with the Constitution since the last meeting of the Cabinet.

112. Cabinet Forward Plan

The Leader advised that the latest Cabinet Forward Plan had been published on the Council's website.

The meeting ended at 11.10 am

CHAIRMAN

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CABINET



Report subject	Council Budget Monitoring 2025/26 at Quarter Three
Meeting date	4 February 2026
Status	Public Report
Executive summary	<p>This report provides the quarter three 2025/26 projected financial outturn information for the general fund, capital programme, housing revenue account (HRA) and Dedicated Schools Grant (DSG).</p> <p>The quarter three position is a projected overspend for the general fund of £4.6m (compared with £4.2m at quarter two) largely due to increased demand for adult and children social care with some offset from the central contingency and budgets in the Resources directorate.</p>
Recommendations	<p>It is RECOMMENDED that Cabinet:</p> <p>A. Note the budget monitoring position for quarter three 2025/26.</p> <p>B. Encourage Senior Officers, budget holders, and Portfolio Holders to take all reasonable steps to reduce the forecast overspend in the final quarter of the financial year.</p> <p>C. Approve the capital virement as set out in Appendix C1 at paragraph 2.</p>
Reason for recommendations	<p>To comply with accounting codes of practice and best practice which requires councils to regularly monitor the annual budget position and take any action to support the sustainability of the council's financial position.</p> <p>To comply with the council's financial regulation concerning approval for budget virements.</p>
Portfolio Holder(s):	Cllr. Mike Cox, Finance
Corporate Director	Aidan Dunn, Chief Executive
Report Authors	Adam Richens, Director of Finance and Chief Finance Officer Nicola Webb, Assistant Chief Finance Officer Matthew Filmer, Assistant Chief Finance officer
Wards	Council-wide
Classification	For Decision

Background

1. In February 2025 Council agreed the 2025/26 annual general fund net revenue budget of £356m, and a capital programme of £136m. The revenue budget included delivery of £9.6m of itemised service and transformation savings. Budgets were also agreed for the ring-fenced housing revenue account (HRA) and Dedicated School Grant for school funding.

Revenue Outturn Projection 2025/26 at Quarter Three

2. The council is projecting an overspend at outturn of £4.6m and increase of £0.4m compared with quarter two. This forecast is after releasing the general contingency of £2.8m. There is no specific contingency this year to counter non-delivery of programmed savings.
3. A summary of the year end projection is included in the table below. The table summarises the total variances by directorate and includes the impact of the savings not expected to be delivered by the year end.

Table 1: Summary projected outturn as at quarter three

Q2		Outturn Forecast at Quarter three					
Variance Forecast £000's	Corporate Directorate	Gross Budget £000's	Net Budget £000's	Forecast Outturn £000's	Total Variance £000's	Savings undelivered £000's	Other Variances £000's
3,668	Wellbeing	337,413	137,963	140,788	2,826	0	2,826
2,735	Children	130,546	100,083	105,193	5,110	0	5,110
302	Operations	187,979	60,131	60,739	608	871	(263)
(203)	Resources	58,732	50,576	49,695	(881)	0	(881)
(2,351)	Central	32,371	8,767	5,677	(3,090)	0	(3,090)
0	Funding		(357,521)	(357,521)	0	0	0
4,151	Total	747,041	0	362,092	4,573	871	3,702

4. Pressures identified early in the year have continued. Care costs have increased in adult social care with offset from additional income and commissioning savings reducing the overall pressure from the last quarter. The pressure in children's social care have continued to grow with new caseload and higher placement costs. The forecast for services within Operations remains a small overspend with the Resources directorate increasing the surplus from vacancies, using earmarked reserves and deferring expenditure. The offset from the centrally held general contingency and other central budgets reduces the overall overspend to £4.6m.
5. Within operations services the main pressures are from reduced planning income (continuing the trend from last year), and additional costs for emergency repairs and cleaning costs in facilities management. Reduced expenditure in other service areas reduce the overall overspend for the directorate.
6. Within the Resources budget area, only law and governance services are indicating an overspend which is related to increased staff costs and reduced income from land charges, with mitigations provided by other services.
7. Appendix A1 provides the detail and reasons for the main projected budget variances in each service area.
8. Appendix A2 provides a summary revenue outturn statement.

9. The 2026/27 Budget and medium-term financial plan (MTFP) report scheduled for 11 February Cabinet will consider how the predicted overspend for 2025/26 is to be dealt with should it materialise.

Savings Monitoring 2025/26

10. Delivery of budgeted savings of £9.6m is an important part of a balanced in-year position and a sustainable medium term financial plan (MTFP). The position at quarter three shows the progress of savings from service reductions, additional resources, transformation and efficiency programmes is unchanged from last quarter at 90% to be delivered by the year end. Amounts not expected to be delivered are included in the budget variances in Appendix A1.
11. An amount of only £0.1m has been determined as definitely unachievable as the savings are dependent on events that will not now take place or were later than planned.

Reserves Monitoring for 31 March 2026

12. Table 2 below summarises the projected movement in reserves during the current financial year.

Table 2: Summary of projected movements in reserves

	Balance 1 April 2025	Balance 31 March 2026	Movement
	£m	£m	£m
Un-earmarked reserves	27.3	29.3	2.0
Earmarked reserves*	55.7	32.5	23.2
Total reserves	83.0	61.8	25.2

*These reserves do not include revenue reserves earmarked for capital, school balances or the negative DSG reserve.

13. The above table assumes that the current projected overspend will be managed, without impacting on the level of reserves at the end of the year.
14. Unearmarked reserves have increased by £2m from a transfer from the transition and transformation reserve which is no longer required. Earmarked reserves are those that have been set aside for specific purposes. The main movements in earmarked reserves include drawing down government grants in line with the latest profile of their application, progressing priority corporate and transition and transformation projects.
15. Appendix B provides a summary of earmarked reserves projected for 31 March 2026.

Dedicated Schools Grant (DSG)

16. The ring-fenced DSG in 2025/26 was budgeted at £405m and is provided to fund early years providers, schools, a small range of central services and provision for pupils with high needs. The high needs funding within that total was £64.5m with expenditure projected to be approaching double. A funding gap of £57.5m was budgeted and included in the estimated accumulated deficit for March 2026.
17. High needs funding has been reduced by £0.5m in-year to reflect the growth in the number of placements in the year since January 2024 for provisions hosted by the DfE. The adjustment is unusually high for 2025/26, reflecting the significant

growth over 2024/25 in the number of children and adults up to age 25 in these provisions, with the number in specialist post-16 institutions doubling.

18. The final 2024/25 settlement for the DSG early years block to reflect the January 2025 census, was received in August. This provided an additional £1.9m compared with the estimated clawback in the year end accounts. This was mainly due to funded places for children aged under two being higher than estimated.
19. At quarter three 2025/26 an anticipated overspend of £15.5m is projected for the high needs budget, and with the addition of the £57.5m budgeted gap and reduced DSG income of £0.5m the funding gap is now projected at £73.5m. Saving in other funding blocks reduce the in-year deficit to £70.3.

Table 3: Summary position for dedicated schools grant

Dedicated Schools Grant	£m
Accumulated deficit 1 April 2025	113.3
Prior year additional funding – early years	(1.9)
Budgeted high needs funding shortfall 2025/26	57.5
High needs funding reduction 2025/26	0.5
High needs overspend 2025/26	15.5
Surplus on other blocks 2025/26	(1.3)
Projected accumulated deficit 31 March 2026	183.6

20. There remain significant assumptions in the high needs projection with data quality in the service still needing to improve. There is no indication yet that the special education needs improvement strategy and plan is changing the trajectory of demand or reducing the average cost of provision.
21. The government has delayed the publication of the Schools White paper, which was expected to address the high needs budget issues, from autumn 2025 to early 2026. There is no release date for this information, but it is expected in February.
22. Conversations are on-going with MHCLG in seeking an immediate solution to the impact the deficit is having on the general fund from the drain on cash resources and the cost of borrowing. The outcome of these conversations is expected in the final Local Government Finance Settlement announcements. This will be reported to Cabinet and Council at the meetings later in February when the 2026/27 budget and MTFP report is presented.
23. In the meantime, the government's November 2025 Budget Statement:
 - Confirmed that the DSG statutory override, which keeps the accumulated deficit out of the general fund, will stay in place until the end of the March 2028.
 - Set out that from 2028/29, central government support to councils for SEND will be at a level that means further deficits need not accrue. Funding for that in 2028/29 will be absorbed within the overall government budget, not the core schools budget.
 - Noted that budgets from 2028/29 onwards will be confirmed in the 2027 Spending Review

- Indicated that further detail on support for historic and accruing deficits, up to 2028/29, and conditions for accessing such support, will be set out in the Local Government Finance Settlement.
 - Indicated that further detail on SEND policy changes will be set out in the Schools White Paper, expected in early 2026.
24. A joint letter from the DfE and NHS England on 15 December 2025 noted that support provided to local authorities will be linked to assurance that they are taking steps to make a new system a reality, in conjunction with government confirming the detail of SEND reform. Best practice and case studies from previous programmes are being disseminated, with a focus on efficient spending, such as from Safety Valve and Delivering Better Value, and providing all local authorities with SEND and financial advisers to help consider how these learnings can be applied. These advisers will also play a key role in supporting the preparations for reform, reviewing data, embedding best practice and driving progress toward the delivery of high-quality, inclusive services for children and young people.
25. Provided with the above letter was an early version of a maturity assessment tool for local area partnerships to assess the maturity of current practice, and plan the changes needed to strengthen the local system. This will be an integral part of the local SEND reform plan.

Capital Programme

26. The total resources for the 2025/26 capital investment programme increased from the £136m agreed in February to £173m at quarter two but reduced to £99m in quarter three. This is due to capital scheme budgets of £74m reprofiled to future years and to be reflected in the capital investment Medium Term Financial Plan.
27. Significant movements over quarter two included new schemes for flood defences and the Port of Poole with the Department for Education SEND allocations included. The spending profile of these and other schemes has been assessed over quarter three, given that spend against the programme was only 13% at the half year.
28. The major parts of the programme are within the Operations directorate for £84m (85%).
29. The total spend to date is still relatively low at 42% of the reduced programme, with low spend across Operations and Children's Services projects.
30. Appendix C provides monitoring information for the capital programme at quarter three with the details of the virement to be agreed by Cabinet summarised in paragraph 2 of Appendix C1.

Housing Revenue Account (HRA)

31. The HRA is a separate account within the council that ring-fences the income and expenditure associated with the council's housing stock. The HRA does not therefore directly impact on the council's wider general fund budget.
32. The 2025/26 HRA budget was approved by Council in February 2025. It budgeted for total income of £58.5m for the year and a net surplus of £4.1m.
33. The overall net surplus is forecast at £3.7m which is £0.4m below the £4.1m budgeted.
34. The forecast outturn for dwelling rents is in line with budget.
35. Repairs & maintenance expenditure is projected at £1.8m, a deterioration of £0.7m compared with quarter two. The very high volumes of response repairs

being experienced has continued and increased in quarter three. The accelerated programme of stock condition surveys being undertaken, damp and mould works and the very cold and wet weather has increased boiler and roofing repairs.

- 36. Supervision and management costs are £0.7m lower than budget due to savings on utility costs and staff vacancies. Interest charges are £0.7m lower than budget as reserves were higher than budgeted for the start of year reducing the need to borrow.
- 37. The forecast expenditure for capital programme is ahead of budget as schemes have caught up on slippage brought forward in programmes from last year.
- 38. Appendix D provides a summary of HRA budget monitoring for both the revenue and capital account at quarter one.

Scenarios

- 39. The projected outturn is prepared based on estimates and assumptions, with the mostly likely outcome included in budget monitoring reports.

Summary of financial implications

- 40. This is a financial report with budget implications a key feature of the above paragraphs.
- 41. The growing DSG deficit is a significant risk to the financial position of the council with the accumulated DSG deficit greater than the total of the council's earmarked and unearmarked reserves on 31 March 2025. The forecast that the in-year funding gap is continuing to grow will inevitably bring forward the date when the council exhausts its cashflow position which is currently providing the resources to cover the excess high needs budget related expenditure.

Summary of legal implications

- 42. The recommendations in this report are to comply with the council's financial regulations with attention drawn to significant budget variances as part of good financial planning to ensure the council remains financially viable over the current year and into the future.

Summary of human resources implications

- 43. There are no direct human resources implications from the recommendations in this report.

Summary of sustainability impact

- 44. There are no direct sustainability impacts from the recommendations in this report.

Summary of public health implications

- 45. The council is seeking to maintain appropriate services for the vulnerable as well as improve the sustainability of services important for the wellbeing of all residents.

Summary of equality implications

- 46. Budget holders are managing their budgets with due regard to equalities issues.

Summary of risk assessment

- 47. The projected outturn is prepared based on estimates and assumptions, including that mitigation plans for current general fund budget pressures will be successful.

Budget monitoring corporately will continue to be reported quarterly to manage these variances and other significant issues emerging throughout the year.

48. The most significant risk to the council's financial sustainability continues to be the current level and growth of the accumulated deficit for the DSG. The annual funding gap will continue to grow unless current trends can be reversed. Central government has committed to reduce the impact on local council's from this national problem with details currently awaited. In the meantime, the council must continue to take steps to minimise the financial problem as far as possible.

Background papers

49. The link to the budget papers at February Council for 2025/26 is below:

[Welcome to BCP Council | BCP](#) item General Fund 111 and HRA 113

46. The link to the budget monitoring report 2025/26 at quarter two is on the link below:

[Welcome to BCP Council | BCP](#) item 79

Appendices

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| Appendix A | A1 Revenue Projected Budget Variances by Service Area 2025/26 |
| | A2 Revenue Outturn Summary 2025/26 |
| Appendix B | Earmarked Reserves Projection for 31 March 26 |
| Appendix C | Capital Programme Monitoring 2025/26 |
| Appendix D | HRA Projected Outturn 2025/26 |

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Appendix A1: Projected Revenue Budget Variances by Service Area 2025/26

1. The projected outturn for each directorate is shown in the tables and narrative below.

Wellbeing – £2.8m overspend (2.0%)

2. The Wellbeing directorate is projected to overspend by £2.8m due to additional net expenditure in adult social care services.

Q2 Variance £000's	Service	Working budget £000's	Projected Outturn £000's	Q3 Variance £000's
	Adult Social Care Services			
7,215	Care packages – all ages and needs	191,000	200,540	9,541
63	Employees	28,056	27,918	(138)
(1,922)	Client Contributions	(32,444)	(35,965)	(3,521)
(1,068)	Health Funding: CHC/JF/Sec117/BCF	(28,043)	(29,467)	(1,424)
0	Income from NHS (Section 256)	0	0	0
(70)	Other Funding: grants, other authorities, NHS	(17,670)	(18,502)	(832)
68	Other services: training, running costs, etc.	375	532	157
4,286	Total Adult Social Care Services	141,274	145,057	3,783
	Commissioning			
(427)	ASC: Care and contracts (including Tricuro)	30,182	29,557	(625)
(54)	ASC: Employees	3,262	3,023	(239)
240	ASC: Client contributions	(1,624)	(1,474)	150
(131)	ASC: Health Funding: CHC/JF/Sec117/BCF	(9,020)	(8,966)	54
0	ASC: Income from NHS (Section 256)	0	0	0
(12)	ASC: Grants and other income	(35,948)	(35,970)	(22)
(12)	ASC: Other services/voluntary sector/ projects, etc.	600	546	(54)
(396)	Total Commissioning	(12,548)	(13,284)	(736)
	Housing and Public protection			
0	Asset Management	(2,280)	(2,280)	0
0	Housing and Community Management	226	226	0
(60)	Public Protection	3,294	3,234	(60)
(161)	Strategic Housing and Partnerships	6,738	6,577	(161)
(221)	Total Housing and Public Protection	7,978	7,757	(221)
	Public Health and Communities			
0	Community Engagement and Safety	1,259	1,259	0
0	Public Health – ring-fenced grant funded	0	0	0
0	Total Public Health and Communities	1,259	1,259	0
3,668	Wellbeing Total	137,963	140,789	2,826

Adult Social Care

- The Adult Social Care (ASC) service unit is projected to be overspending by £3.8m at the end of third quarter of the financial year.
- The most prominent component of the above position is attributable to cost of care and care packages driven by demand for adults aged 65+ and high-cost placements for service users with learning disability and autism related needs:

- a. Short term trend analysis suggests that between April and end of December demand for care home placement for adults aged 65+ increased by 5.3%. This volume increase is mainly from hospital discharge and quicker than anticipated private service users' capital depletion. There is also significant impact on cost of care from service users accessing council commissioned care where such arrangements are backed with service users' assets.
 - b. Close to £0.3m of cost increase within residential care for adults aged 65+ is an effect of accepting an ordinary resident case from Hampshire (retrospective payment back 6 years).
 - c. Cost of residential care estimate for adults aged 65+ assumes operational actions to bring the caseload down to budgeted level by the end of the year. An estimate of £1.0m is already built into the projection to allow for the success of demand management.
 - d. Domiciliary care for service users with Long Term Conditions grew by 3% in the third quarter and the forecast assumes further demand management to ensure a sustainable position by the end of the year.
 - e. Cost of care home placements for younger adults was adversely affected by a high-cost case transferred to Adults from Children Social Care at a cost of £15,000 per week. Adults put the case forward for NHS continuing health care (CHC) joint funding with the Integrated Care Board (ICB) with a 50-50 cost split agreed. And furthermore, with adults bringing the case to Court of Protection (COP) it was possible to move the case to a better value placement. This enabled a reduction of the cost to the Council by £0.2m (further cases are expected to materialise).
 - f. The number of specialism cases in community care or approved for such care exceeds planned activity by 11%, whilst the cost of such care, driven by needs complexity, exceeds planned level by 5%. Specialism care home placement fees are being reviewed on an individual basis. As at the end of December 2025 the volume of projected service users in such care characterises 8.5% increase comparing to budget with forecast cost being reflection of that pressure. Several outstanding uplift negotiations are continuing over the winter and the projection includes £0.15m to allow for these changes.
5. The rising demand for care noted above has an impact on the level of contributions collected with client contributions £3.5m more than the planned level. The number of service user contributions recorded between April and December where providers are paid gross has improved the position according to assessed charges. This area now reflects all care contributions backed by service users' assets.
 6. Staffing turnover has slowed with fewer vacancies than usual in the second quarter. Vacancy freeze implemented in the autumn and agency costs controls introduced in December resulted in improvement in staffing costs forecast position, which is now estimated at £0.14m underspend.
 7. Due to the rising volume of service users in care, the number of cases where cost sharing with the health authority is in place or fully funded within NHS has also continued ahead of budget, estimated at £1.4m. This projection includes newly agreed joint funded cases and recharges to the NHS following ordinary residence agreements and high-cost transition case mentioned in paragraph 4. More cases are being shared also with out of area health authorities.

Commissioning

8. The Commissioning service unit is projected to underspend by £0.7m, a small increase since second quarter.

9. Contractual arrangements continue being reviewed with block bed commitments reconfigured and contract agreements revised to achieve in-year efficiencies or allow for demand changes where beds are not being fully used. This underspend alleviates cost of care pressure in Adult Social Care, where spot purchasing has to be pursued due to complexity of service user needs.
10. There are a small number of health care eligible service users in commissioning-led block contracts in the council-owned (Tricuro) care homes. The full cost of the service, previously reported as recovered and retained, was transferred to local authority trading company, in support of their non-Council commissioned element of activities.
11. Service user contribution variance was amended in second quarter to reflect deferred contributions backed by a service user's property. Service users' contributions to block commissioned beds noted improvement in third quarter.
12. Continued scrutiny of vacancies and agency worker expenditure controls introduced resulted in improving employment cost forecast with projected underspend of £0.2m.

Public Health & Community Engagement and Safety

13. Public Health, including the smoking cessation service, is fully funded by external Department of Health and Social Care (DHSC) grant and currently is projected to spend all resources on planned services.
14. Early this financial year, the service received an assurance visit from Regional Director of Public Health (RDPH) to assess the council's use of grant funding. The RDPH was assured the planned use was consistent with the DHSC expectations and grant conditions. Preparations and conversations during the visit clearly indicated that future national funding growth will be limited and robust scrutiny of current budgets and reserve management will be necessary to make sure sustainable public health services can be delivered in the coming years.
15. Community engagement and safety is primarily funded through grants, community initiatives, and strategic partnerships, with allocations confirmed for the year. The service continues to operate within budget with no forecast variances anticipated, consistent with the previously reported position.

Housing & Public Protection

16. Strategic Housing is maintaining a projected underspend of £0.16m for the current year. This reflects the effective use of targeted grant funding to support homelessness prevention and recovery initiatives, reducing pressure on the core budget. These grants have helped offset significant challenges, including borrowing costs for temporary accommodation, managing bad debt linked to a vulnerable client base, and essential repairs to older housing assets.
17. A major focus this year is the additional £2m Rough Sleeping Prevention and Recovery Grant (RSPARG). This funding is being used to strengthen local services and improve outcomes for people at risk of homelessness or rough sleeping. Key areas of planned spend include a new floating support service with additional move-on accommodation, increased capacity for the rough sleeper outreach team, and a small grants scheme for voluntary and community sector partners. Further investment will support training across the homelessness partnership, updated health and housing needs assessments, and additional winter provision. These initiatives will help address immediate pressures while building resilience for the future.
18. Looking ahead, following the recently announced finance settlement, next year's consolidated grants and the planned roll-forward of some funding into the Revenue Support Grant will provide greater certainty and support financial planning. While these allocations do not impact the current year's forecast, they will be important in shaping how we manage future pressures and sustain service delivery.

19. Public protection continues to report a small surplus, consistent with the position in the previous quarter. This reflects the benefit of one-off funding that has helped offset pressures in income generation and staffing. While these challenges remain, they are being actively managed to maintain financial stability within the service. The overall position is steady, with no significant changes since quarter two, and the focus remains on ensuring resources are used effectively to support core service delivery.
20. Asset Management covers income and maintenance responsibilities for photovoltaic (PV) panels and garages. A review is currently underway to assess ongoing repairs and maintenance requirements for these assets. The aim of this review is to ensure the stock can operate on a sustainable financial basis, with income supporting the investment needed to maintain and enhance the asset base. Income this year is strong and will help meet these investment needs, which is essential to sustain and maximise future income generation.

Children's Services – £5.1m overspend (5.1%)

21. The forecast for Children's Services at quarter three is an overspend of £5.1m, an increase of £2.4m since quarter two.

Q 2 Variance £000's	Service	Working budget £000's	Projected Outturn £000's	Q3 Variance £000's
(498)	Commissioning, Resources and Quality	20,399	19,745	(655)
5,725	Children's Social Care	65,356	74,295	8,938
412	Education and Skills	24,221	24,263	41
(2,904)	Service Management	(9,894)	(13,109)	(3,215)
2,735	Children's General Fund Total	100,083	105,193	5,110

22. **Children's Social Care:** The additional overspend is driven primarily by the continuous increase in the number of children coming into care & increased costs of children in care (CIC). The complexity of children in care continues to be a concern as there is an emerging trend for providers to request additional funding to support the child once placed. There is the potential for this level of overspend to grow if recent trends continue but the service is putting in measures to reduce the number of children coming into care and how long they stay in care. A CIC strategy is currently being developed with the aim of addressing these issues. It is worth noting that this forecast is yet to account for the potential increase or reduction in cost of unplanned leavers and newcomers or changes in existing care packages as recent trends have made it very difficult to predict.
23. The forecast also includes approximately £0.7m relating to cost of young adults (over 18 years) who continue to be funded by Children's Services, despite being more appropriately aligned to housing or adults social care budgets.
24. **Commissioning, Resources and Quality:** The forecast underspend has increased due to the removal of some salary forecasts, following confirmation that planned recruitment will now take place in 2026/27.
25. **Education and Skills:** The forecast reduction reflects lower projected home to school transport expected outturn. While there has been significant increase of £365k in forecast for SEND Tribunal, compensation & mediation cost, the reduction of £0.7m in home to school transport is expected to compensate.
26. **Service Management:** This additional forecast underspend arises from the realignment of the transformation budget into children's social care, where it is more appropriately aligned.

Operations – £0.6m overspend (1.0%)

27. The budget projection for Operations is an overspend of £0.6m (increase of £0.3m since quarter two) and a variance against the net budget of 1% at the end of quarter three.

Q2 Variance £000's	Service	Working budget £000's	Projected Outturn £000's	Q3 Variance £000's
	Commercial Operations			
(601)	Director	497	497	0
111	Flood and Coastal Erosion	1,123	1,123	0
(50)	Head of Commercial Operations	103	52	(52)
180	Leisure and Events	939	854	(85)
122	Parking Services	(18,837)	(18,837)	0
(268)	Seafront	(6,695)	(7,044)	(348)
(507)	Commercial Operations	(22,871)	(23,356)	(485)
	Environment			
18	Service Management	569	587	18
276	Neighbourhood & Grounds	17,305	17,230	(76)
(335)	Passenger Transport	260	(75)	(335)
(206)	Bereavement & Coroner	888	813	(75)
(90)	Strategic Waste	8,361	8,201	(160)
(27)	Greenspace	578	551	(27)
50	Transport & Operating Centres	5,191	5,241	50
(314)	Environment	33,152	32,548	(604)
	Planning & Transport			
0	Planning Management	487	487	0
592	Planning Operations	1,028	1,690	662
8	Strategic Planning	1,567	1,575	8
0	Planning System	122	122	0
36	Transport Policy / Sustainable Travel	12,693	12,879	187
636	Planning & Transport	15,897	16,784	857
	Investment and Development			
(16)	Housing Delivery	139	47	(92)
0	Regeneration Delivery	958	958	0
0	Smart Places	122	122	0
(27)	Operations Strategy	78	52	(27)
(42)	Investment and Development	1,390	1,271	(119)
	Customer & Property Operations			
46	Business Support	8,411	8,457	46
0	Culture	3,275	3,275	0
(1)	Customer Services	2,917	2,867	(50)
163	Libraries	4,542	4,695	153
0	Bournemouth Library PFI contract	1,659	1,659	0
(246)	Engineering	5,290	5,273	(17)
537	Facilities Management	7,663	8,200	537
0	Property Maintenance (CWT & IHT)	(1,357)	(1,157)	200
31	Telecare	161	251	90
529	Customer & Property Operations	32,561	33,520	959
302	Operations Services	60,131	60,739	608

Commercial Operations

28. Director of Commercial Operations is no longer reporting a surplus of £0.6m in respect of the 2025-26 pay award as the distribution across the relevant services, where the equal and opposite pressures had previously been showing, has now taken place.
29. Parking services are reporting a balanced position. Whilst income has been comparable with previous years, this is less than the budgeted income expectation. However, discretionary expenditure has been frozen to mitigate the income shortfall. In the quarter two forecast the net income of £0.24m relating to the PCN trial, had not been included due to the risk of future challenge, with this set aside in an earmarked reserve. However, the quarter three position releases £0.15m to balance the in-year position.
30. The Leisure & Events service is showing a £0.09m underspend. The staffing pressures and business rates liabilities associated with Kings Park leisure centre reported at quarter two have been offset by underspends in other areas of expenditure across the service as part of the expenditure freeze.
31. Despite the good weather, seafront services are experiencing a fall in income mainly due to the cliff slip impact on income generating services such as the land train, beach huts, cliff lifts and catering of £0.3m, however this loss of income is due to be offset by use of freezing, wherever possible, discretionary budgets, including staffing, equipment and repairs and maintenance, which has allowed the service to turn the position around and report a £0.3m surplus. In addition to this all spend relating to the repairs and maintenance of the cliffs are being funded from the cliff slip reserve, which stands currently at £0.6m of the £1.4m reserve. Cost-of-living pressures for customers and additional cost pressures for staffing and products are still inherent. There are also some seasonal pressures as a response to the anti-social behaviour, with the service attempting to contain within their current budgets, such as in staffing of the multi-agency control centre (MACC) and an increase in body worn cameras.

Environment

32. Neighbourhood services and grounds are forecasting a £0.1m underspend, which is an improved position from quarter two of £0.35m. Within the Waste and cleansing teams there are still pressures within the salaries and unbudgeted overtime payments needed and work is ongoing to reduce agency spend and tackle absence issues. Within highways there has been an improvement in the demand for dropped crossings, which despite the expected income still being below budget is improving, resulting in less of a pressure. There is still a pressure for road markings on main roads as they naturally wear, but this has been partly offset by lower Tarmac costs and lower material disposal costs. The parks operations service continues to further cut spending in some of their supplies and services budgets in response to the spend freeze and in holding vacant posts.
33. The passenger transport service has forecast a £0.3m underspend. This is primarily related to vacant driver posts underspending on supplies and services from the spend freeze.
34. The number of cremations is down on last year. National research shows a continuing shift towards direct cremations offered by online providers, many of which have their own crematorium facilities, rising from 3% in 2019 to 20% in 2024. This trend is anticipated to grow as awareness of direct cremations increase. In addition, local competitors have established in the area and BCP death registrations have declined. The forecast income pressure is £0.3m, partly offset by a salary underspend from vacant posts.
35. The strategic waste position is forecasting a £0.16m surplus position, however, within that there are some individual pressures and savings. The waste disposal contract recycling price is lower than budgeted for in quarters one, two and three, and the recycling sales income is higher. Commercial weighbridge income is also forecast to

exceed budget. This is offset by pressures in external haulage fees, employee costs due to absence and overtime payments.

36. There is an overall £0.05m pressure within the transport & operating centres, on parts, external works, tyres and vehicle hire budgets, partly offset by underspends on salaries due to vacant fitter posts. This position remains unchanged from quarter one. The service has now secured two apprentice positions and filled a vacant fitter role, via agency, which will increase in-house capability.

Planning and Transport

37. The forecast pressure within planning operations is mainly due to the lower demand for planning applications and the associated income derived from this activity. This follows on from the reduction seen last financial year and is consistent with the national trend. The planning service are actively trying to mitigate this downward trend where possible. An increase in pressure of £0.07m since quarter three is from the use of agency staff. This is being addressed in the hope that it may be reduced by the end of this financial year.
38. There is also an overspend of £0.2m due to pressures driven by the tree maintenance costs, from the requirement to fulfil statutory duties. There is a backlog of tree maintenance work and to be compliant and avoid further costs this work needs to be completed.
39. Concessionary fares expenditure (statutory service) has slightly decreased by £0.07m since quarter two. However, the national trend is still growing, and a deficit is still being reported. This has been partly offset by many small underspends across the sustainable travel service.
40. An underachievement of income is being forecast within network management of £0.13m. Primarily due to the street works income falling by £0.2m due to reduced activity and compliance, in addition to highway enforcement income also slightly down, partly offset by lower contractor costs and expenditure savings within road safety and ITS.

Investment and Development

41. Investment & Development have forecast an improved position of £0.076m since quarter two which is a result of a full review of expenditure and reprioritising essential spend only. This has resulted in an underspend within the supplies and services budgets within the housing delivery team.

Customer & Property Operations

42. Customer Services are forecasting a year end surplus position of £0.05m mainly due to staff vacancies and slightly improved income.
43. Within library services a forecast pressure of £0.16m is mainly related to £0.13m of unrealised savings from delayed opportunities for vacating corporate properties. This saving requirement has been removed as part of the MTFP process for the next financial year 2026/27. There is also a smaller pressure of £0.03m from additional security required at Bournemouth central library as a direct result of anti-social behaviour.
44. Engineering services position has worsened since quarter two by £0.23m. Whilst there are still savings attributable to the Dorset PFI street-lighting contract from lower rates for electricity. There is a lower capital recharge opportunity for engineering services in addition to an income pressure within the building control service.
45. Facilities management have forecast a pressure of £0.5m due to the growing demand, year on year for emergency/essential building repairs and maintenance across the council's estate, including the leisure centres and waste transfer stations brought in house last year. Works of £0.16m have been capitalised with funding provided by a small contingent fund in capital reserves under officer delegations. The cleaning contract is also forecasting a pressure of £0.5m, and this is mainly due to a centralised budget that

was too small in addition to the annual inflation and national living wage increases from the external contractor. As part of the MTFP process this budget has been rightsized so the pressure should cease from April 2026.

46. The Construction Works Team (CWT) within Property Maintenance has adapted well following the strategic realignment of the CHNAS housing programme, which reduced the pipeline of new works. The team has successfully identified new project opportunities and is now broadly on track to achieve full cost recovery. Resource agreements have been reviewed and recharges updated to reflect service delivery and ensure alignment with operational requirements.
47. From 1 April, the In-House Team (IHT) for repairs and maintenance transitioned to a revised operating model, with services now delivered through the council owned company, Bournemouth Building & Maintenance Ltd. This change has highlighted that the income budget was based on historic assumptions, including a year where a significant surplus was recorded, which does not reflect the current delivery model. Under the new arrangements, most works are not expected to generate a surplus, so the current pressure reflects historic budgeting assumptions rather than the performance of the In-House Team.
48. Work is underway to realign budgets to ensure they accurately reflect the revised delivery model. While forecast adjustments to fleet allocations will help mitigate the initial impact, a remaining forecast pressure of £200k is expected for the year.
49. Within telecare a £0.09m pressure is due to £0.115m in income with annual budget increases not being matched by demand and a slower than anticipated switch to digital from analogue. This is partly offset by other savings, mainly in staffing.

Resources – £0.9m underspend (1.7%)

50. Executive and Resources provide professional support services to the council and undertake tax collection and housing benefits administration.

Q2 Variance £000's	Service	Working budget £000's	Projected Outturn £000's	Q3 Variance £000's
0	Executive	929	929	0
330	Law and Governance	5,774	6,054	280
(3)	Marketing, Comms and Policy	2,568	2,565	(3)
0	People and Culture	5,124	4,627	(497)
(170)	Finance, Estates and Benefits	17,383	17,163	(220)
(360)	IT and Programmes	18,798	18,357	(441)
(203)	Executive & Resources Total	50,576	49,695	(881)

51. Resources overall are projecting a significant underspend of £0.9m compared with £0.2m at quarter two. This improvement reflects continued vacancy management, deferred expenditure, and the release of reserves where appropriate. These actions have strengthened the financial position and provided additional flexibility to manage service pressures.
52. Law and Governance is reporting a projected overspend of £0.3m, an improvement from last quarter. The reduction is primarily due to improved land charges income, although this remains subject to external market conditions. Staffing pressures within Registrars continue, but these are partially offset by income surpluses. The service is actively reviewing options to address ongoing staffing challenges.
53. Legal services continue to manage locum usage, with plans progressing to establish a more stable staffing base and reduce reliance on temporary arrangements.

54. Marketing, Communications and Policy services remain broadly on budget, with a minor surplus variance. The service continues to implement its mitigation strategy and manage expenditure carefully, although income generation remains challenging.
55. People and Culture is now projecting an underspend of £0.5m, a significant improvement from a balanced position last quarter. This change reflects the allocation of base staffing costs to the pay and reward project (£0.25m) and the release of reserves previously held but no longer required (£0.2m). These actions have reduced pressure on the core budget and contributed to the overall surplus.
56. Finance, Estates and Benefits is forecasting an underspend of £0.2m, up slightly from last quarter. This improvement is driven by increased vacancy savings within Finance and continued underspends in Estates and Procurement due to the recruitment freeze. Revenues and Benefits remain balanced through planned use of reserves.
57. IT and Programmes is projecting an underspend of £0.4m. The small increase from last quarter reflects additional vacancy savings alongside previously reported efficiencies in desktop replacement programme, photocopying, telephony, and mobile costs. These savings continue to support the council's digital transformation agenda while maintaining a stable financial position.

Corporate Budgets

58. The table below provides a summary of the variances:

Q2 Variance £000's	Service	Working budget £000's	Projected Outturn £000's	Q3 Variance £000's
338	Pay related costs	(338)	0	338
(2,790)	Contingency	2,828	0	(2,828)
(300)	Interest Payable	6,488	5,788	(700)
0	Investment Income	(655)	(1,055)	(400)
0	Prudential Borrowing	2,920	2,920	(0)
0	Pay & grading project	854	854	0
0	Debt Repayment - MRP & VRP	12,044	12,044	0
900	Housing Benefits	(1,323)	(423)	900
0	Contribution from HRA	(3,744)	(3,743)	0
0	Investment Properties	(5,301)	(5,301)	0
80	Vacant Properties	590	770	180
0	Dividend Income	(316)	(316)	0
0	Levies	658	658	0
0	Apprentice Levy	782	782	0
0	Parishes / Town Precept / Chartered Trustee	1,491	1,491	0
(580)	Earmarked Reserves use	(8,440)	(9,020)	(580)
0	Pension Backfunding	3,716	3,716	0
0	Admin costs charged to Grants	(1,820)	(1,820)	0
0	One off Corporate Items	(1,666)	(1,666)	0
(2,351)	Corporate Items	8,767	5,677	(3,090)
	Funding			
0	Council Tax Income	(281,232)	(281,232)	0
0	Parishes / Town Precept / Chartered Trustee	(1,491)	(1,491)	0
0	New Homes Bonus	(246)	(246)	0

Q2 Variance £000's	Service	Working budget £000's	Projected Outturn £000's	Q3 Variance £000's
0	Revenue Support Grant	(4,416)	(4,416)	0
0	NNDR Net Income	(43,243)	(43,243)	0
0	NNDR 31 Grants	(26,215)	(26,215)	0
0	Estimated Deficit Collection Fund - NNDR	(678)	(678)	0
0	Estimated Surplus Collection Fund - CTAX	0	0	0
(2,351)	Corporate Total	(348,753)	(351,843)	(3,090)

59. An overall £0.3m pressure in pay related costs combine an underspend in the budget set aside for national insurance increases (£0.5m) with a £0.8m overspend on the cost of annual pay award which was agreed at 3.2% compared with the budget of 2.8%.
60. The underspent contingency of £2.8m represents the release of all available budget to support overspends across other budgets.
61. An underspend in earmarked reserves of £0.6m represents the release of capital reserves to support expenditure in services not previously planned.
62. An underspend of £0.7m in the treasury management function arises from our continued ability to borrow in the local authority market as opposed to needing to take longer term borrowing via the Public Works Loan Board, with the rates also falling quicker than expected. The need to borrow has also reduced following better than expected housing benefit subsidy receipts, although borrowing ahead of need has been undertaken to avoid increased rates in quarter four with surplus funds invested over the early weeks of the final quarter in £0.4m generating more interest receivable compared with the quarter two position.
63. A £0.9m overspend on housing benefit is forecast based on an increase in costs unable to be recovered by government subsidy.
64. An overspend of £0.2m in vacant properties is due to higher than budgeted security costs at sites including Constitution Hill and Fairways along with business rates at Parkway House.



Appendix A2 - General Fund Summary

Directorate	Revenue	Working Budget £'000	Forecast £'000	Variance £'000
Wellbeing	Expenditure Total	337,413	348,533	11,120
	Income Total	(199,450)	(207,744)	(8,294)
Wellbeing Total		137,963	140,789	2,826
Children's Services	Expenditure Total	130,546	140,718	10,172
	Income Total	(30,463)	(35,525)	(5,062)
Children's Services Total		100,083	105,193	5,110
Operations	Expenditure Total	187,979	188,377	398
	Income Total	(127,848)	(127,639)	209
Operations Total		60,131	60,738	607
Resources	Expenditure Total	57,678	56,477	(1,201)
	Income Total	(8,031)	(7,711)	320
Resources Total		49,647	48,766	(881)
Executive	Expenditure Total	1,054	1,054	0
	Income Total	(125)	(125)	0
Executive Total		929	929	0

Total Net Cost of Service		348,753	356,415	7,662
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Corporate Items

Pay award 2025/26		(338)	0	338
Budget Contingency		2,828	0	(2,828)
Treasury management interest income		(655)	(1,055)	(400)
Treasury management borrowing costs		6,488	5,788	(700)
Pay & grading project		854	854	0
Prudential Borrowing		2,920	2,920	0
Vacant properties		590	770	180
Benefits		(1,323)	(423)	900
Earmarked Reserves		(8,440)	(9,020)	(580)
Investment Properties		(5,301)	(5,301)	0
Council Tax Income		(281,232)	(281,232)	0
Other Corporate Items		(65,144)	(65,144)	0
Net Position		0	4,573	4,573

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Appendix B - Earmarked Reserves for 31 March 2026

Detail	31/03/25 Actual Balances	Estimated movement	31/03/26 Estimated Balances
	£000's	£000's	£000's
Application of one-off resources to support the financial sustainability of the MTFP following a fundamental review as part of the process of building the budget for 2024/25	(2,790)	2,790	0
Transition and Transformation Reserves	(3,126)	2,017	(1,109)
Insurance Reserve	(5,018)	0	(5,018)
Held in Partnership for External Organisations	(3,467)	798	(2,669)
Required by Statute or Legislation	(795)	0	(795)
Planning Related	(354)	(107)	(461)
Government Grants	(18,959)	7,456	(11,503)
Maintenance	(3,231)	(448)	(3,679)
ICT Development & Improvement	(3,637)	474	(3,163)
Corporate Priorities & Improvements	(14,318)	10,198	(4,120)
Total Earmarked Reserve Balance	(55,693)	23,178	(32,516)

One off Business Rates Resources being applied to MTFP Reserve

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Designed to provide the Council with the ability to manage any emerging issues. Includes reserves to enable the management of the MTFP.			
Total One off Business Rates Resources being applied to MTFP	(2,790)	2,790	0
One off Business Rates Resources being applied to MTFP Reserve	(2,790)	2,790	0

Transition and Transformation Reserves

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Resources set aside to support the one-off change costs of associated with creating the new council and meeting the Councils costs associated with the transformation project.			
Pay and Reward funding to support 2026/27 costs	(1,109)	0	(1,109)
Redundancy - Non Transformation Funded	(2,017)	2,017	0
Transition and Transformation Reserves	(3,126)	2,017	(1,109)

Insurance Reserve

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Reserve to enable the annual fluctuations in the amounts of excesses payable to be funded without creating an in-year pressures on the services. Subject to ongoing review by an independent third party.			
Insurance Reserve	(5,018)	0	(5,018)

Held in Partnership for External Organisations

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Amounts held in trust on behalf of partners or external third party organisations.			
Youth Programme	(174)	24	(150)
Music and Arts Education Partnership	(412)	150	(262)
ICS Emotional Wellbeing and Mental Health	(85)	85	0
Little Explores Nursery	(207)	0	(207)
Dorset Combined Youth Offending Service Partnership	(619)	102	(517)
Dorset Adult Learning Service (Specific Bequeath)	(99)	0	(99)
Dorset Adult Learning Service	(686)	0	(686)
FCERM - Shared with East Devon DC	(190)	0	(190)
Adult Safeguarding Board	(216)	53	(163)
Better Care Fund	(326)	248	(78)
UP2U	(74)	25	(49)
Kinson Community Centre - Community Benefit Fund - Enhancement works	(1)	1	0
Domestic Homicide Reviews	(10)	10	0
- Russell Cotes revenue grant (New)	(367)	100	(267)
Held in Partnership for External Organisations	(3,467)	798	(2,669)

Required by Statute or Legislation

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Amounts which the council is required to hold as a reserve in line with current accounting practice or legislative requirements.			
Bournemouth Library Private Finance Initiative (PFI)	(739)	0	(739)
Carbon Trust	(56)	0	(56)
Required by Statute or Legislation	(795)	0	(795)

Planning Related

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Reserves designed to support planning processes and associated planning activity where expenditure is not incurred on an even annual basis.			
Local Development Plan Reserve	(70)	0	(70)
Other Planning Related Reserves	(284)	(107)	(391)
Planning Related	(354)	(107)	(461)

Government Grants

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Amounts which the council is required to hold as a reserve in line with specific grant conditions.			
Government Grants	(18,928)	7,456	(11,472)
COVID 19 Government Grants	(31)	0	(31)
Total Unspent Grants	(18,959)	7,456	(11,503)

Maintenance

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Reserves and sinking funds designed to support maintenance investments in specific services or assets.			
Corporate Maintenance Fund	(2,618)	5	(2,613)
Other Maintenance Related Reserves	(612)	(453)	(1,065)
Maintenance	(3,231)	(448)	(3,679)

ICT Development & Improvement

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Resources set aside to meet various ICT improvement projects			
ICT Development & Improvement	(3,637)	474	(3,163)

Corporate Priorities & Improvements

	31/03/25 Actual £000's	Actual Movement £000's	31/03/26 Estimated £000's
Purpose: Amounts set a side to deliver various priorities, some of which will be of a historical nature inherited from the predecessor authorities.			
Other Service Priority reserves	(13,121)	9,626	(3,495)
Local Elections Reserve	(369)	(170)	(539)
Revenue & Benefits Reserve	(633)	546	(87)
Covid recovery resources	(196)	196	0
Corporate Priorities & Improvements	(14,318)	10,198	(4,120)

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**General Fund Capital Investment Programme (CIP) budget position by service area
Quarter 3 - end of December 2025.**

Capital budget Virements

1. In accordance with the council's financial regulations the following rules associated with capital virements apply (after advice from the Chief Finance Officer):
 - Virements over £1 million require prior Council approval.
 - Virements over £500,000 and up to £1 million require prior Cabinet approval.
 - Corporate Directors can approve virements over £100,000 up to £500,000.
 - Service Directors can approve virements up to £100,000.

2. According to the above financial regulations, the following decisions for changes within the capital programme are required of **Cabinet**:

Approve virement to use the Transforming Cities Fund (TCF) contingency to cover the increased allocation of £844,982 for the Ringwood Road Sea View to Manning Heath scheme.

The TCF programme set a level of contingency for all projects to manage the risk of project scope changes, and other factors such as inflation and wider market demands. Each TCF project as part of the programme was set a level of contingency.

The contingency allowance has been maintained and managed outside of the individual project budgets to ensure any erosion of risk sums were approved and adjusted dependant on the stage of the project. Any completed projects where the full realisation of the contingency allowance was not utilised is used to support the delivery of any remaining projects. The Ringwood Road Sea View to Manning Heath scheme is the largest single value project, the increase to the budget is the adjustment allowance required to support the level of contingency associated with the project, the original allowance for contingency has not exceed the original forecast to date.

Capital investment Programme Summary

3. The tables below show the summary position for capital investment programme (CIP) in the general fund as of 31 December 2025.
4. Summary budget movements are shown in table 1 with the detail by directorate included in table 2. How the programme is funded is included in table 3 followed by narrative detail. The total resources for the 2025/26 capital investment programme have reduced from £173 million to £98.8 million. This is due to capital schemes budget of £74 million reprofiled to future years and reflected in the capital investment plan Medium Term Financial Plan.
5. The total spend to the end of December 2026 is 42% which is below a profiled spend of 75% for this time of the year, however there are some larger schemes which are targeted to be delivered during the winter months with expenditure being incurred during quarter four. It is anticipated that additional slippage may incur which will be reprofiled to 2026/27 after 2025/26 closedown.

Table 1 – Summary of budget movement

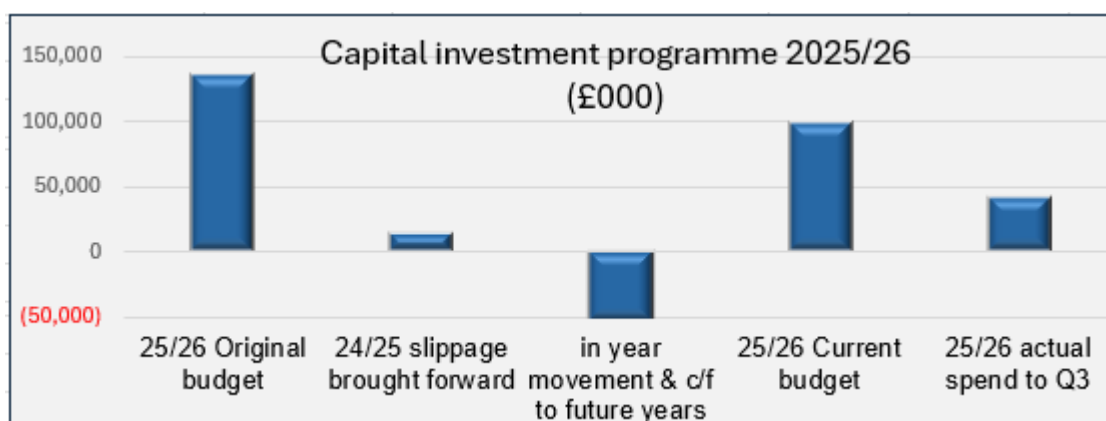


Table 2 – Summary movement and current position by Directorate

Capital Investment Programme 25/26 Monitoring	25/26 Original budget £000	24/25 slippage brought forward £000	in year movement & c/f to future years £000	25/26 Current budget £000	Actual 25/26 £000	% budget consumed
Operations						
Commercial Operations	34,111	838	(19,315)	15,634	5,961	38%
Investment and Development	8,897	495	(1,665)	7,727	1,736	22%
Customer Arts and Property	34,242	6,322	(710)	39,854	21,626	54%
Planning and Transport	12,667	2,334	(7,242)	7,759	1,566	20%
Environment	22,189	2,053	(10,796)	13,446	3,731	28%
	112,106	12,042	(39,728)	84,420	34,620	41%
Children Services						
Education and Skills	16,169	3,214	(12,514)	6,869	3,045	44%
	16,169	3,214	(12,514)	6,869	3,045	44%
Wellbeing						
Housing and Community	3,790	(475)	75	3,390	2,316	68%
Adults Commissioning	2,685	92	0	2,777	1,228	44%
	6,475	(383)	75	6,167	3,544	57%
Executive						
IT and Programmes	1,588	202	(445)	1,345	729	54%
	1,588	202	(445)	1,345	729	54%
	136,338	15,075	(52,612)	98,801	41,938	42%

Table 3 – Capital Investment programme funding profile

Capital Investment Programme Funding	25/26 Original budget £000	24/25 slippage brought forward £000	in year movement & c/f into future £000	25/26 Current budget £000
Prudential Borrowing	(20,087)	(2,640)	8,583	(14,144)
Capital Receipts (General Fur	(1,165)	(23)	(99)	(1,287)
Reserve Funding (general fun	(557)	(88)	645	0
Reserve Funding (General fur	(920)	(70)	(1,082)	(2,072)
RCCO	0	(1)	(402)	(403)
BCP Funding Requirement	(22,729)	(2,822)	7,645	(17,906)
S106	(458)	(494)	123	(829)
CIL	(4,110)	(340)	6	(4,444)
Non-government grants	(1,053)	(622)	(253)	(1,928)
Government Grants	(107,357)	(9,886)	43,938	(73,305)
Third party contributions	(631)	(911)	1,153	(389)
External Funding Contribution	(113,609)	(12,253)	44,967	(80,895)
	(136,338)	(15,075)	52,612	(98,801)

OPERATIONS (£84.4m)**Commercial Operations - £15.6m**

6. The Flood and Coastal Erosion Risk Management (FCERM) current budget for 2025/26 is £12.4 million funded mainly from Environment Agency grant and Community Infrastructure Levy. The largest scheme Poole Bridge to Hunger Hill flood defence has been reprofiled to future years to comply with environmental and compliance licences leaving £7.7million planned for this financial year's winter months. The majority of the expenditure for Poole Bay Beach management nearly £3 million is also planned over the winter months.
7. Seafront Development projects have a planned expenditure budget of £2.6 million for 2025/26 of which £1.8 million relates to projects funded from the Levelling Up Infrastructure Fund (MHCLG grant). Of these projects, £14.1 million has been reprofiled to future years and reflected in the 2026/27 MTFP. BCP council has received confirmation of an extension to the spending deadline to March 2028. The largest project (Bournemouth Pier works) is currently out to tender; works are expected to start in March 2026 for an 18-month programme. The budget has been reprofiled accordingly.
8. The Canford Cliffs pavilion and beach huts and Mudeford beach house café projects approved by a predecessor authority have not commenced. In accordance with the council capital investment principles, these projects have been removed from the capital programme due to time lag. A review is underway revising the business cases which will be presented to BCP Council for consideration in due course.

Investment & Development - £7.7m (excluding HRA)

9. The overall Towns Fund (MHCLG grant) is £21.7 million of which £4 million is profiled for use during 2025/26 in the general fund with £1.3 million spent to end of December 2025. It is anticipated that the Hawkwood Road community centre build and the high street shop front projects will slip into 2026/27 and will be reprofiled accordingly. The final £8.6 million of the grant is profiled to be spent during 2026/27 (of which £5.5 million will be utilised in the HRA).
10. The council housing acquisition programme is almost complete. There are a few properties with repair works still in progress. The service is finalising the use of the Local Authority Housing Fund 3.
11. Poole Dolphin Leisure Centre development options on refurbishment are being explored with the £0.6 million budget carried into 2025/26 of which £48,000 has been spent to the end of quarter three.
12. Holes Bay delivery route is being explored to seek a development partner to take the project forward with £0.3 million budget carried into 2025/26 of which £68,000 has been spent to end of quarter three.
13. Wessex Fields Infrastructure: The link road is nearing completion with £0.4 million slippage profiled to 2025/26, of which £52,000 has been spent.

Customer Arts and Property - £39.9m

14. The in-house engineering unit manages nearly £33.7 million of the highway's asset management, improvement and travel programme on behalf of the planning and transport directorate with nearly £18 million spent to date (53%), a higher level of expenditure is planned over the winter months. Predicted slippage of £12.3 million has been reprofiled to 2026/27 and has been reflected in the MTFP.
15. The Poole Museums programme of £2.9 million for 2025/26 reached practical completion in September with a small number of post contract works being finalised. The final accounts are being negotiated, therefore the final financial position is not yet known, however there is no further information available to change previous estimates. There have been further delays in the delivery of the project, the effect of this will not be known until the accounts are finalised. The Russell Cotes MEND project originally estimated to spend £0.7 million in 2025/26 is predicting slippage of £0.4 million which has been reprofiled to 2026/27.

16. Approximately £2.3 million estates management and accommodation strategy expenditure is planned for 2025/26 of which £1.1 million is spent to end of December.

Planning and Transport - £7.8m

17. This service leads on the Highways asset management, improvement and sustainable travel programme and transport capital programme management acting as client to the in-house engineering unit within the Customer Arts and Property Directorate.
18. Within the Planning and Transport service direct reporting is £7.8 million profiled spend in 2025/26 including £3 million bus service improvement plan and £3.6 million on network management, sustainable travel and transport improvements. The expenditure incurred up to the end of December was £1.6 million (20%). Any budget remaining following expenditure over the winter months will be carried forward to 2026/27.

Environment - £13.4m

19. The fleet and equipment budget profiled for 2025/26 is £6.6 million after £5 million slippage has been profiled to 2026/27, of this £0.7 million was spent to end of December. Vehicles are replaced, when necessary, therefore the replacement programme may be delayed due to longer vehicle lifecycle. Unused budget will be reprofiled to future years to continue the replacement programme.
20. Sustainable waste and green infrastructure account for £6.5 million, after £6.8 million was reprofiled to 2026/27, actual spend to end of December in this service was £3 million. The plan for play programme initial work has been around planning and procurement activities with more contractual expenditure to take place in the second part of the financial year with likely slippage into 2026/27.

CHILDREN SERVICES (£6.9m)

21. The 2025/26 capital programme has begun to deliver the 3-year children's Services Capital Strategy approved by council in March 2025.
22. The remaining budget in 2025/26 after £16.9 million was reprofiled to future years is £6.9 million of which £3 million was spent up to the end of December. The available funding will be considered as part of the children service capital strategy.

WELLBEING (£6.2m)

Housing and Communities - £3.4m

23. The Disabled facilities Grant usage for disabled adaptations profiled for 25/26 is £2.7 million of which 80% has been spent to the end of quarter three. The service is catching up with backlog of property adaptations and using prior year grant carried forward.
24. The remaining expenditure of £0.7 million relates to CCTV systems, community related activity and tenancy services. £0.1 million has been spent to end of quarter three.

Adults Commissioning £2.8m

25. The majority of spend within this programme relates to the Integrated Community Equipment Store (ICES) funded by the Disabled Facilities Grant with 47% spent to the end of quarter three. The council continues to provide support to the community through this means from an annual allocation from the Better Care Fund pooled budget with Health.

EXECUTIVE & RESOURCES (£1.3m)

IT and Programmes Capital - £1.3m

26. The councils ICT investment programme planned spend for 2025/26 has reduced to £1.3 million mainly on desktop replacement after £0.4 million was reprofiled to 2026/27. The total spend up to the end of December was £0.7 million.

Capital Investment programme 2025/26 project list						
	25/26 Original Budget	24/25 Slippage Brought Forward	In year movement/ c/f to future years	25/26 Current Budget	Actual 30/09/25	% Budget Consumed
	£000	£000	£000	£000	£000	£000
CHILDREN - CAPITAL						
Education and Skills Capital						
Basic Needs Grant - uncommitted	760	(33)	(727)	-	-	
School Conditions Grant - Uncommitted	3,990	46	(4,036)	-	-	
SEND Options Appraisal Works- Rolling Programme	200	-	(200)	-	-	
High needs Grant - Uncommitted	7,852	(21)	(7,299)	532	-	0%
Ocean Academy	-	-	-	-	1	
Childcare Expansion - Wraparound	277	13	(242)	48	32	67%
Childcare Expansion - Expanded Entitlement	-	191	104	295	251	85%
Hillbourne - New School	-	416	-	416	12	3%
Condition Surveys (Children's Strategy)	50	-	-	50	5	9%
CS Urgent Work	100	-	-	100	11	11%
Poole High Planned Maintenance investigations	50	54	-	104	37	35%
Old Town & Baden Powell Caretaker property sale reimbursement	-	220	(80)	140	136	97%
Parkstone Grammar School	252	-	(252)	-	-	
Advanced Design Fees SEND	200	(7)	-	193	14	7%
Broadstone Resource Base/Satellite	100	(49)	-	51	(31)	-61%
Elm Academy	-	99	(99)	-	-	
Victoria Education Centre	90	73	-	163	-	0%
Bournemouth Learning Centre	-	35	(35)	-	-	
Winchelsea temporary office space	28	(28)	-	-	5	
CS URGENT WORK Somerford Primary School	-	-	-	-	6	
Planned Repairs and Maintenance	142	-	(142)	-	-	
Climate Change/Low Carbon Reduction	550	-	(80)	470	21	4%
Winchelsea interim accommodation	32	(32)	-	-	24	
Linwood School Expansion	-	12	(12)	-	-	
Canford Heath Infant Junior SEND Provision	446	540	-	985	68	7%
Linwood at Oakdale SEND satellite	-	27	-	27	-	0%
Link at Bourne Academy SEND provision	-	11	14	25	23	92%
Linwood School Post-16 at Ted Webster	1,000	265	80	1,345	1,222	91%
Linwood Satellite 1	-	500	(500)	-	-	
Linwood Satellite 2	-	500	(500)	-	-	
Linwood Special School- Stourfield Satellite	-	72	(72)	-	-	
Christchurch Learning Centre - AP School Satellite	-	200	(200)	-	-	
Linwood at Stourfield Satellite	-	16	(16)	-	-	
Family Hubs Transformation	-	95	102	197	-	0%
Basic Needs Surveys	50	-	-	50	-	0%
Mudeford Wood Preschool (Highcliffe day centre premises)	-	-	30	30	45	151%
Burton Primary School - planned R&M	-	-	52	52	41	79%
Christchurch Learning Centre - planned R&M	-	-	42	42	0	1%
Highcliffe St Mark - planned R&M	-	-	373	373	359	96%
Linwood - planned R&M	-	-	183	183	177	97%
Mudeford Infant School - planned R&M	-	-	165	165	121	73%
Mudeford Junior School - planned R&M	-	-	110	110	80	72%
Somerford Primary School - planned R&M	-	-	22	22	13	58%
Winchelsea School - planned R&M	-	-	54	54	50	93%
Dingley's promise (Kinson and West Howe)	-	-	25	25	23	94%
Dingley's promise (350 Poole Road)	-	-	60	60	47	79%
Dingley's promise (Somerford Primary bungalow)	-	-	307	307	17	5%
Winchelsea Satellite at Old Town First School	-	-	31	31	17	54%
Somerford Forest Hub Classroom	-	-	41	41	33	79%
Advanced Design Fees Maintained Schools	-	-	-	-	1	
Education & Skills - Project Management Fees - Schools Condition	-	-	-	-	38	
Education & Skills - Project Management Fees - Schools High Needs	-	-	-	-	65	
SEND Adaptations	-	-	100	100	-	0%
Schools Devolved Formula Capital (DFC)	-	-	83	83	83	100%
Education and Skills Capital Total	16,169	3,214	(12,514)	6,869	3,045	44%
Children Capital Total	16,169	3,214	(12,514)	6,869	3,045	44%
EXECUTIVE - CAPITAL						
IT and Programmes Capital						
Enterprise Hosting	60	29	-	89	-	0%
Enterprise Security	-	90	-	90	22	24%
Enterprise Comms (WAN Migration)	148	8	-	156	1	1%
Enterprise Storage & Data	-	26	(26)	-	-	
Enterprise Apps (Applications)	-	81	-	81	5	6%
Enterprise Compute (Platform Modernisation)	150	-	-	150	6	4%
Enterprise Endpoints (Desktop Replacement)	1,195	-	(445)	750	673	90%
Enterprise Comms (Telephony)	35	(32)	26	29	23	79%
IT and Programmes Capital Total	1,588	202	(445)	1,345	729	54%
Executive - Capital Total	1,588	202	(445)	1,345	729	1

OPERATIONS - CAPITAL

Commercial Operations Capital

3G Artificial Pitch Rossmore Leisure Centre - Feasibility	-	129	-	129	-	0%
Ashdown Leisure Centre Floodlights	-	6	-	6	(22)	-346%
Avon Beach to Highcliffe Beach Management	35	4	-	39	7	17%
BCP Cliff Management Strategy	100	(2)	-	98	71	72%
Beach Road Rear Car Park	-	23	-	23	5	21%
Broadstone Underpass Mural	-	31	(31)	-	-	
Canford Cliffs Pavilion	500	500	(1,000)	-	-	
Christchurch Bay and Harbour FCERM Strategy	67	(9)	-	58	27	46%
Christchurch Town Centre Strategy	64	-	-	64	-	0%
Surface Water Management Plan scoping phase	-	-	90	90	29	32%
Sterte Flood Defence Works (pumping station)	-	-	358	358	2	0%
Durley Chine Environmental Innovation Hub	270	(4)	-	265	3	1%
Durlston to Hurst Sediment Resource Management programme	175	(40)	90	225	95	42%
FCERM Partnership Funding	52	(17)	-	35	(10)	-29%
Highcliffe Beach Access Ramps	-	9	-	9	9	98%
Highcliffe Castle, (inc Phoenix Flies Project)	-	32	-	32	-	0%
Inland Asset Management System	-	36	-	36	1	4%
Kinson Catchment Surface Water FAS	35	(1)	-	34	17	51%
Lake Pier Major Refurbishment	-	2	-	2	(7)	-432%
Leisure centre management in-house set up and investment	100	56	-	156	-	0%
MCA Project	3	-	-	3	3	100%
Mudeford Beach House Café	550	-	(550)	-	-	
Mudeford Ferry Pontoon	64	-	74	138	125	91%
Mudeford Sandbanks Beach Management	35	5	-	40	3	7%
New Beach Huts - Canford Cliffs	3,118	-	(3,118)	-	-	
Poole Bay Beach Management 2020-2031	3,639	750	(1,438)	2,950	894	30%
Poole Bridge to Hunger Hill (PB2HH)	8,995	(477)	(821)	7,697	3,682	48%
RNLI Signage and Public Rescue Equipment	80	(23)	-	57	23	40%
Sandbanks Pavilion	4	-	-	4	-	0%
SEAFRONT (LUF) Alum Chine Cloisters (Feasibility)	43	10	(53)	-	-	
SEAFRONT (LUF) Boscombe Pier (Feasibility)	39	(13)	(26)	-	-	
SEAFRONT (LUF) Bournemouth Lifeguard Corps (New Building)	-	56	35	91	90	98%
SEAFRONT (LUF) Bournemouth Pier (Future Leisure Offer)	-	116	(116)	-	-	
SEAFRONT (LUF) Bournemouth Pier (Structural Engineering)	9,043	(471)	(8,521)	52	40	77%
SEAFRONT (LUF) Coastal Heritage Trail (Culture)	500	(44)	(1)	455	126	28%
SEAFRONT (LUF) East Cliff Lift (Future Leisure Offer)	98	-	(98)	-	-	
SEAFRONT (LUF) East Cliff Lift (Stabilisation Works)	4,189	(206)	(3,863)	120	64	53%
SEAFRONT (LUF) Hamworthy Sea Wall (Repairs)	-	74	(39)	35	26	75%
SEAFRONT (LUF) Holes Bay Visual Arts Centre	53	-	(53)	-	-	
SEAFRONT (LUF) Project Management & Sundry Costs	-	-	148	148	77	52%
SEAFRONT (LUF) Promenade Infrastructure (Utility & Digital)	687	100	(387)	400	293	73%
SEAFRONT (LUF) Seafront Beach Huts (Repairs & Upgrades)	1,066	(7)	(980)	79	1	1%
SEAFRONT (LUF) Seafront Toilets (Repairs & Upgrades)	-	69	200	269	38	14%
SEAFRONT (LUF) The Strand (Access, Amenity & Wellbeing)	368	(97)	(68)	203	164	81%
SEAFRONT (LUF) Upton Country Park (Bridge & Cycle Path)	-	-	10	10	10	95%
Upton Country Park - Discovery project	-	-	-	-	5	
Upton Country Park New Play Attraction	-	16	-	16	-	0%
Upton House stabilisation	-	158	-	158	24	15%
Poole Bay, Harbour and Wareham FCERM Strategy	-	41	200	241	18	7%
Whitley Lake Sea Defence Study	60	29	-	89	-	0%
South West Storms Analysis	-	-	68	68	5	8%
Jurassic Coast FCERM Mitigation Study (revenue)	-	-	173	173	16	9%
Debris Screen Health and Safety Works	-	-	100	100	2	2%
Poole Park Tennis Courts Resurface	80	-	-	80	-	0%
Holes Bay Saltmarsh Regen	-	-	-	-	9	
Christchurch Harbour Habitat Restoration Feasibility Study	-	-	51	51	-	0%
Sea Cliff and Chine management	-	-	250	250	-	0%

Commercial Operations Capital Total	34,111	838	(19,315)	15,634	5,961	38%
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Customer, Arts and Property Capital

A3060 CASTLE LANE WEST (MUSCLIFFE WAY TO BROADWAY R'BOUT)	1,500	18	-	1,518	572	38%
A341 WIMBORNE RD (FERNCROFT RD TO N'BOURNE RD)	600	130	(225)	505	492	97%
A35 COMMERCIAL RD (PARK RD TO CHURCH RD)	-	71	-	71	-	0%
ATF4 Baiter footpath and cycleway imp	-	-	59	59	59	100%
ATF4 Bournemouth Gardens path	-	475	(69)	405	38	9%
ATF4 School streets permanent measures	-	54	29	84	4	4%
ATF4 Turbary Park Link	-	265	(29)	236	233	99%
ATF4 Wallisdown Road phase 4 (Bndry to Uni)	-	86	180	266	174	66%
ATF4 Wallisdown Road phase 5 (crossroads)	-	323	(180)	143	29	20%
Avenue Road Car Park	-	22	-	22	-	0%
B- Wayfinding	152	28	-	180	202	112%
BH Live	518	-	(518)	-	(70)	
BMS Systems (Building energy management)	-	5	-	5	-	0%
Bridge Maintenance	-	(12)	600	588	165	28%
Bridge Maintenance RETENTION (Poole)	-	33	-	33	-	0%
BSIP Bmth station to Town centre bus priority	2,600	37	1,240	3,877	231	6%
BSIP High street and Bargates Christchurch	700	345	(865)	180	198	110%
BSIP Westbourne bus priority	700	17	(430)	287	125	44%
Bus Priority on TCF Corridors	-	82	-	82	37	45%

C- Bus Infrastructure	-	140	-	140	1	0%
Capital Replacement - Corporate Estates	-	10	-	10	21	212%
Capitalised maintenance Neighbourhood Services (Pru borrowing)	900	121	-	1,021	19	2%
Castle Lane West - Muscliffe to Broadway	2,437	115	(438)	2,114	2,298	109%
Ceramics Gallery (Poole Museum)	250	64	0	314	97	31%
Christchurch Priory, Wall Repairs	130	2	-	132	38	29%
Civic Centre data centre air con units	100	23	-	123	125	101%
Civic Hub (decarbonisation works)	-	18	-	18	-	0%
Corridor C2 Sections 6 to 8 off line Route Redhill-Airport	25	52	-	77	49	64%
Cycle Corridor Section C2-3A-B Glenferness Ave Bridge	1,502	(935)	(40)	527	141	27%
DLEP Lansdowne Business District	-	120	80	200	29	14%
Durley Car Park - School Zone (Developer funded)	-	3	(3)	-	-	
Extension Zero + Kinson Hub (from B customer Services above)	162	37	-	199	40	20%
Ferndown, Wallisdown, Poole (FWP) Corridors Phase 3	-	(231)	653	422	416	98%
Fisherman's Walk Cliff Lift	-	17	-	17	9	55%
Gervis Place	-	147	-	147	-	0%
Highcliffe Castle - Draft proofing and BMS	-	13	-	13	-	0%
Honeycombe Chine - waterproofing	-	25	-	25	-	0%
Highways Structural Maintenance - Design Fees	-	-	340	340	286	84%
Highways structural mainatenance - Drainage Improvements	-	-	275	275	142	52%
Highways structural mainatenance - Footways (resurf + slurry)	-	-	150	150	99	66%
Highways structural mainatenance - Resurfacing Programme	300	-	2,577	2,877	1,887	66%
Highways structural mainatenance - Surveys & software	-	33	144	177	118	67%
ICT investment	53	(2)	-	51	0	0%
Kings Park (inc crossings on Ashley)	-	65	(14)	51	60	117%
Lamp columns Shore road	-	4	42	46	20	43%
Library Replacement ICT Programme	165	18	(183)	-	-	
Millhams Recycling Centre (Slab remediation)	-	68	-	68	-	0%
Neighbourhood Services (Streetscene) -Pothole investment	1,000	301	(1,301)	-	-	
Neighbourhood Services HMSF Planned pre-patching	200	-	1,445	1,645	878	53%
New BCP Depot	230	(19)	-	211	23	11%
New Inn to Trigon Footbridge	67	(33)	-	34	-	0%
Parkway House (insurance and landlord works)	255	31	-	286	117	41%
Poole Museum - Our Museum project	1,200	501	576	2,277	1,908	84%
Poole Museum - Our Museum project - Activity Plan	80	17	-	97	5	6%
Poole Museum - Temporary Exhibition Gallery	-	69	(60)	9	7	70%
Poole Museum Public Realm - Phase 2	200	21	-	221	205	93%
Poole Museum Decarbonisation (Salix)	-	17	-	17	17	97%
PR 42 - Asset Management BIC	-	-	65	65	40	61%
PR 43 - Asset Management Pavilion	-	-	65	65	65	101%
PR 44 - Asset Management Littledown	-	37	258	295	324	110%
PR 45 - Asset Management Stokewood	-	-	65	65	1	2%
PR 46 - Asset Management Pelhams	-	-	65	65	10	16%
Principal Inspection Programme (BCP)	-	10	100	110	37	34%
Programme Management	780	(68)	0	712	349	49%
Remodelling BCP Civic space- West Wing	350	11	-	361	82	23%
Ringwood Rd - Controlled crossing only	60	91	356	507	495	97%
Ringwood Rd Sea View to Manning Heath	11,570	1,579	(6,930)	6,219	5,925	95%
Road Safety Improvements 20mph schemes	75	64	24	163	18	11%
Road Safety: Casualty Reduction Measures, Cluster Sites	200	242	50	492	59	12%
Road Safety: Safe Routes to School (SRTS)	250	112	500	862	633	73%
Road Safety: Safety Improvements - Pedestrian Crossings	-	248	250	498	51	10%
Russell Cotes MEND Project	-	34	-	34	4	13%
Russell Cotes Museum - roof/balcony water proofing	-	39	-	39	-	0%
S6 Section 1 Magna Road Arrowsmith to Bearcross	-	143	-	143	3	2%
Safer Roads Partnership	700	289	-	989	384	39%
Scaplen's Court Museum	100	(100)	36	36	89	246%
Scaplen's Court Museum Paving works	-	14	-	14	1	6%
Sopers Lane Pedestrian Crossing	-	24	-	24	-	0%
Street Lighting Maintenance	-	72	695	767	166	22%
Surface treatment - Road markings, patching, micro asphalt	150	(36)	672	786	470	60%
Thames Street Public Realm	-	80	65	145	58	40%
Transforming Cities Fund (TCF) Unallocated	3,931	-	(3,310)	621	-	0%
Walking and Cycling improvements	-	208	75	283	42	15%
SLM Capital dilapidations	-	287	-	287	104	36%
Wimborne Road - Serpentine to New Inn	50	131	(41)	140	71	50%
Telecare	-	-	178	178	166	93%
Port of Poole Bridges Programme	-	-	142	142	27	19%
Crossing at Richmond Road north of Springbourne roundabout	-	-	214	214	19	9%
Crossing at Alder Road near Recreation Rd and Sheringham Rd	-	-	210	210	32	15%
Recreation Road to Coy Pond Quiet Route (incl. Yarmouth Rd crossing)	-	-	479	479	6	1%
Highcliffe Road Toucan Crossing	-	-	50	50	23	46%
Parkstone Rd/Birds Hill Rd Crossing	-	-	300	300	7	2%
Russell Cotes MEND 4 Project	-	-	300	300	25	8%
CWT Plant & Machinery	-	-	145	145	182	125%
Street Lighting Investment project	-	-	17	17	-	0%
Boscombe Cliff Gardens clifftop shelter renovation	-	-	17	17	-	0%
Rossmore Leisure Centre - Fire Alarms	-	-	20	20	20	100%
Avon View EPH - Residential Care Home - Lifts	-	-	48	48	48	100%
Kings Park Leisure and Learning Centre - Fire Alarms	-	-	29	29	29	99%
Ashdown Leisure Centre - Leisure Centre - Block 1 - Fire Alarms	-	-	17	17	17	100%
Residential PEEPs Social Housing	-	-	31	31	-	0%
Customer, Arts and Property Capital Total	34,242	6,322	(710)	39,854	21,626	54%

Environment Capital						
Alexandra Park Pavilion Refurbishment	-	10	-	10	4	37%
Ashtree meadows access improvements	-	10	-	10	-	0%
Broadstone Rec Play Build	-	6	-	6	-	0%
Canford Heath (East & West) Open Space improvements	80	(15)	(65)	-	-	
Christchurch Legacy Play areas	88	-	(88)	-	-	
Cleaner Greener Safer Equipment	-	219	-	219	-	0%
Coastal Country Park (SANG)	150	(4)	-	146	11	7%
Connecting Christchurch Project	90	34	-	124	35	29%
Fleet Management	10,525	703	(4,698)	6,529	663	10%
Hamworthy Park Improvements	-	19	-	19	-	0%
Harbourside Masterplan (Whitecliff and Baiter)	-	46	(46)	-	-	
Harbourside Park Open Space improvement	71	(12)	(60)	-	-	
Hatchpond electricity works upgrade	-	-	-	-	4	
Hengistbury Head Visitor Centre	230	21	(200)	51	9	17%
Iford Meadows and Playing Fields	-	3	-	3	2	61%
Insourcing Ch'ch Recycling and Hurn WTS	-	14	-	14	-	0%
Knyveton Gardens Improvements	40	(3)	7	44	34	76%
Millhams Civic Amenity Site	-	22	(22)	-	-	
Mudeford Woods infrastructure improvements	200	(18)	(140)	42	39	94%
Muscliff Natural Burial Ground	107	-	(107)	-	-	
Newtown - Turners Nursery	52	-	(52)	-	-	
Paddleboarding signage	-	2	-	2	-	0%
Plan for Play - Repurpose & Review Ownership	2,163	52	(2,177)	38	-	0%
Poole Park - delivery phase	-	17	(17)	-	-	
Queens Park access improvements	-	1	-	1	1	104%
Sluice Channel infrastructure - Poole Park to Poole Harbour	1,162	(21)	60	1,201	1,053	88%
Throop Nature Park (Hicks SANG)	130	8	(90)	48	18	37%
Turbary Common Mire water quality imp	125	(89)	(33)	3	3	100%
UE1 Footpath	-	4	-	4	-	0%
Underground Refuse Systems	-	20	-	20	9	45%
Waste Bin Replacement	660	(51)	-	609	249	41%
Waste Infrastructure Grant Unallocated	5,765	10	(5,700)	76	6	8%
Weekly Food Waste Collections	552	1,037	-	1,589	1,284	81%
Winton Heathland Mitigation Project (HIP)	-	10	-	10	4	44%
UE1 Housing development Merley	-	-	65	65	-	0%
Ashley Cross Green, Parkstone	-	-	74	74	0	0%
Plan for Play - Defect Repairs	-	-	435	435	3	1%
Plan for Play - Refurbishment, Replacement & New Play Spaces	-	-	1,710	1,710	205	12%
Plan for Play - Staff costs	-	-	118	118	13	11%
Plan for Play - Surveys and Consultation Materials	-	-	35	35	25	70%
Chapel Lane potholes (Hurn Waste site)	-	-	21	21	21	100%
Countryside Vehicles	-	-	33	33	33	100%
Fleet Management Additional	-	-	77	77	-	0%
A338 Road Crossing Link	-	-	10	10	-	0%
Milhams Common HIP	-	-	20	20	-	0%
Bernards Mead HIP	-	-	10	10	1	10%
The Meridians HIP	-	-	20	20	0	2%
Nuffield site improvements	-	-	-	-	1	
Environment Capital Total	22,189	2,053	(10,796)	13,446	3,731	28%
Investment & Development - Capital						
CNHAS - Temporary Accommodation Properties	-	-	45	45	101	225%
CNHAS - Local Authority Housing Fund properties	2,650	-	(455)	2,195	32	1%
CNHAS - Single Homeless Accommodation properties	-	65	17	82	96	117%
CNHAS Oakdale	-	-	-	-	2	
Holes Bay Development	300	(24)	-	277	68	25%
Poole Dolphin Leisure centre (formerly Heart of Poole)	550	88	-	638	48	7%
Towns Fund - Masterplan Contingency	150	(42)	(108)	-	-	
Towns Fund - Boscombe Digital Connectivity - Phase 2	337	16	(62)	291	146	50%
Towns Fund - Boscombe Digital Connectivity - Phase 2 REVENUE	-	-	29	29	13	44%
Towns Fund - Boscombe Skills and Digital Hub	79	-	0	79	20	26%
Towns Fund - Boscombe Skills and Digital Hub REVENUE	135	(81)	(81)	(27)	(81)	296%
Towns Fund - Events Programme REVENUE	32	(6)	5	32	27	85%
Towns Fund - Hawkwood Road Community Centre	1,758	-	(972)	786	-	0%
Towns Fund - Hawkwood Road Community Centre Demolition	594	(3)	-	591	328	55%
Towns Fund - High Street	1,208	23	0	1,231	194	16%
Towns Fund - Local Transport	617	44	95	756	552	73%
Towns Fund - Masterplan (Original)	-	-	5	5	4	75%
Towns Fund - Parks in Mind	42	9	0	50	27	54%
Towns Fund - Programme Management	106	19	0	125	94	75%
Towns Fund - Programme Management REVENUE	86	(30)	26	82	6	7%
Wessex Fields infrastructure works	-	402	-	402	52	13%
Towns Fund - Hawkwood Road - Medical Centre	-	-	-	-	5	
Towns Fund - Royal Arcade	-	-	9	9	-	0%
Public Realm Canford Cliffs	-	10	-	10	-	0%
Town centre strategy (Econ Dev)	-	7	-	7	-	0%
UKSPF District Centres (Capital) E1	-	-	34	34	-	0%
Electric powered Boat for Christchurch Harbourmaster	-	-	-	-	3	
UKSPF Unallocated	253	-	(253)	-	-	
Investment & Development - Capital Total	8,897	495	(1,665)	7,727	1,736	22%

Planning & Transport Capital						
Active Travel Fund - Baiter/Whitecliff cycleway	-	2	(2)	-	(10)	
Active Travel Fund - Programme monitoring	-	6	3	8	8	100%
Advanced Design for Future LTP Schemes (new code)	-	112	200	312	7	2%
Boscombe Towns Fund	288	132	-	420	5	1%
BSIP Branksome Roundabout (BSIP1)	-	39	(38)	0	1	250%
BSIP Bus priority at 65 signalised junctions	-	131	(131)	-	-	
BSIP Live stream CCTV bus shelters to control rm	-	16	-	16	11	71%
BSIP New RTI Displays	-	7	561	567	257	45%
BSIP Poole bus station RTPI inc CCTV	-	10	-	10	4	38%
BSIP Purewell Bus Priority	-	75	-	75	2	3%
BSIP Southbourne bus priority	-	24	-	24	4	18%
Bus Facilities	-	2	1	3	5	154%
Data Collection	-	63	25	88	8	9%
DFT Traffic Signals Funding Bid	-	511	-	511	54	11%
Dropped crossings/Accessibility improvements	-	60	55	115	4	4%
Electric Vehicle Infrastructure	-	29	600	629	0	0%
Employment sites	-	57	-	57	-	0%
Intelligent Transport Systems (ITS) & Data Collection	-	82	370	452	318	70%
Local Transport Plan - 24/25 Unallocated	-	230	(181)	49	-	0%
Minor Transportation Works	-	87	80	167	83	50%
National Passenger Travel Information	-	-	25	25	25	99%
Network efficiency measures (Tower Park roundabout)	-	188	75	263	6	2%
Pokesdown Railway Station	30	7	-	37	-	0%
Programme Management Fees	-	(18)	150	133	149	112%
Rights of Way	-	12	75	87	9	10%
SANG - Barn (and General Purpose Building Obligation)	-	26	-	26	1	2%
School Streets	-	111	50	161	6	3%
South East Dorset Multi-modal Transport Model	-	-	65	65	-	0%
STB, DfT, LCWIP, OBC Development & Bidding	-	194	305	499	348	70%
UTMC - Pelican upgrades	-	99	500	599	103	17%
BSIP unallocated	3,257	42	(3,299)	-	-	
BSIP Branksome Roundabout (BSIP2)	-	-	88	88	5	6%
BSIP Bournemouth Interchange to Station Roundabout bus priority on slip road	-	-	180	180	31	17%
BSIP Ashley Road - Upper Parkstone	-	-	30	30	-	0%
BSIP Charminster Road – Charminster	-	-	30	30	-	0%
BSIP Wimborne Road - Winton parking review	-	-	30	30	6	19%
BSIP Poole Bus Station Refurbishment	-	-	200	200	5	3%
BSIP Bournemouth Travel Interchange Refurbishment	-	-	112	112	59	53%
BSIP Shelter upgrade programme, 30 sites	-	-	350	350	6	2%
BSIP Bus fleet to be Zero Emission	-	-	950	950	-	0%
BSIP Raised kerbing and extended bus stop clearways at 35 stops	-	-	392	392	47	12%
Local Transport Plan - Highways Maintenance Unallocated	6,278	-	(6,278)	-	-	
Local Transport Plan - Integrated Transport Block Unallocated	2,814	-	(2,814)	-	-	
Planning & Transport Capital Total	12,667	2,334	(7,242)	7,759	1,566	20%
Operations - Capital Total	112,106	12,041	(38,728)	84,421	34,621	2
WELLBEING - CAPITAL						
Adults Commissioning Capital						
Care technology service - equipment	94	56	-	150	-	0%
Disabled Facilities Grant - Integrated Community Equipment Store (BCP)	2,591	36	-	2,627	1,228	47%
Adults Commissioning Capital Total	2,685	92	-	2,777	1,228	44%
Housing & Communities Capital						
Cleaner Greener Safer - additional CCTV	-	66	-	66	-	0%
Cleaner Greener Safer - safer improvements	-	40	-	40	-	0%
Disabled Facilities Grant - Housing	3,675	(1,011)	-	2,664	2,163	81%
Private Sector Renewal-warmth & well-being	115	9	-	124	55	44%
UKSPF Communities and Place E11	-	-	75	75	75	100%
Community Land Trust Project (Affordable housing)	-	421	-	421	24	6%
Housing & Communities Capital Total	3,790	(475)	75	3,389	2,316	68%
Wellbeing - Capital Total	6,475	(383)	75	6,167	3,544	57%
Grand Total	136,338	15,075	(52,612)	98,801	41,938	42%

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Quarter Three 2025-26 HRA Forecast

1. The Housing Revenue Account (HRA) is a separate account within the council that ring-fences the income and expenditure associated with the council's housing stock. The HRA does not therefore directly impact on the council's wider general fund budget. Within the HRA the Council manages approximately 9,610 tenanted properties.
2. The 2025-26 HRA budget was approved by Council last February. It budgeted for total income of £58.5 million for the year and a net surplus of £4.1 million.

Revenue account monitoring at quarter three

	2025-26 Budget £000	Full year forecast £000	Variance £000
Income			
Dwelling rents	(54,001)	(54,001)	0
Non-dwelling rents	(276)	(258)	18
Charges for services and facilities	(3,768)	(3,588)	180
Contributions to expenditure	(438)	(549)	(111)
Total income	(58,483)	(58,396)	87
Expenditure			
Repairs and Maintenance	14,031	15,828	1,797
Supervision and Management	18,373	17,617	(756)
Rent, rates, taxes and other charges	447	382	(65)
Bad or doubtful debts	400	400	0
Total expenditure	33,251	34,227	976
Net operating (surplus) / deficit	(25,232)	(24,169)	1,063
Capital charges			
Debt management costs	377	380	3
Depreciation	15,300	15,300	0
Net interest payable	5,425	4,725	(700)
Total capital charges	21,102	20,405	(697)
Net (surplus) / deficit	(4,130)	(3,764)	366
Appropriations			
Transfer to HRA reserve	4,130	3,764	(366)
Total appropriations	4,130	3,764	(366)

Commentary on variances

3. Dwelling rents: The forecast outturn is in line with budget.
4. Charges for services and facilities: Service charge income is forecast to be £0.2m adverse to budget. The is due to lower-than-expected service charges for communal utilities due to the underlying utility costs being lower than budgeted.
5. Other income: The forecast outturn is broadly in line with budget.
6. Repairs & Maintenance: The forecast full-year outturn is £1.8m adverse to budget, a deterioration of £0.7m compared with quarter two. The very high volumes of response repairs being experienced has continued and increased in quarter three. Volumes are 45% higher than budgeted and this heightened level of activity is expected to continue for the remainder of the year. The accelerated programme of stock condition surveys being undertaken has contributed to the high volume of response repairs, as has the

work being undertaken to address damp and mould issues. This has been compounded by the very cold and wet weather experienced recently, which has resulted in increased boiler and roofing repairs.

7. Supervision and Management: Forecast costs are £0.7m lower than budget. This is due to:

	Variance £m
Staff vacancies	(0.5)
Lower utility costs	(0.2)
Underspend on New-build feasibility studies	(0.1)
Offset by: Additional new Housing Management system license fees	0.1
Total Supervision and Management variance	(0.7)

8. Depreciation: The forecast depreciation charge of £15.3m is in line with budget and is consistent with the actual charge for 2024/25.
9. Net interest payable: The £0.7m favourable forecast is because start-of-year HRA reserve balances are higher than were expected when the budget was set. The HRA Earns interest on these balances. Also, some of these reserve balances can be used to fund current year capital expenditure, reducing the requirement for new borrowing and the associated borrowing costs.
10. Net surplus for the year: The forecast net surplus of £3.7m is £0.4m less than budgeted due to the repairs overspend offset by the underspends on Supervision & Management and Net interest payable.

Capital programme

11. The HRA budget paper set out a capital programme of £43.0m for 2025/26. This included £25.2m investment in new-build projects delivered as part of the council newbuild housing & acquisitions strategy (CNHAS) and £17.2m in planned maintenance.

	2025-26 Budget £000	Full year forecast £000	Variance £000
New-build projects	25,202	27,495	2,293
Purchase of existing houses	500	181	(319)
Other major projects (Admiral, Sterte cladding)	100	93	(7)
Planned maintenance	17,202	16,702	(500)
Total capital expenditure	43,004	44,471	1,467

12. New-build projects: Actual expenditure on the new-build capital programme in 2025/26 is forecast to be £27.5m, £2.3m higher than the original budget. This is due to the rescheduling of some expenditure that had been expected to be incurred in 2024/25 into the current year, principally in relation to the Hillbourne school development and Constitution Hill demolition works.
13. There were originally 8 schemes with planned expenditure in the HRA during this financial year: Templeman House, Hillbourne school development, Constitution Hill, Craigmore Avenue, Grants Close, Surrey Road, Oakdale Infill and Hawkwood Road residential. However, Surrey Road will transfer back to the General Fund because the conditions of the MHCLG grant are not compatible with HRA tenancies.

14. Updates on the main schemes are as follows:

- Templeman House is on course to be completed in February 2026.
- The Hillbourne development is on course to be completed in August 2026. There is an estimated £0.4m Homes England grant risk for this project due to a delay in completion date. Discussions are in progress with Homes England and the contractor to mitigate this risk.
- The construction start date at the Hawkwood Road residential site has been delayed due to ongoing discussions with the NHS regarding the letting of the ground floor space. A separate update report will be presented to Cabinet.

15. Purchase of existing houses: The forecast spend for the year relates to the buy-back of the last of the leasehold flats at Trinidad Village which took place in quarter one. All six flats have now been bought back. Whilst the HRA receives right-of-first-refusal to repurchase ex-local authority properties, high borrowing costs mean that repurchases are currently not financially viable.

16. Planned maintenance programme: This covers capital maintenance such as kitchen, bathroom and boiler replacements. Activity and expenditure have recovered from the low level experienced at the start of the year. The current forecast now assumes that total planned maintenance capital expenditure will be in line with budget except for the £0.5m contingency budget, which is not expected to be utilised.

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CABINET



Report subject	Housing Revenue Account (HRA) budget setting 2026-27
Meeting date	4 February 2026
Status	Public Report
Executive summary	<p>The Housing Revenue Account (HRA) is a separate account within the council's budgets that ring-fences the income and expenditure associated with council housing.</p> <p>This report sets out the proposals regarding increases to rents, service charges and other charges to tenants and leaseholders. Arrangements for these increases are separate to arrangements for increasing fees elsewhere in the council and are set out in law and regulation.</p> <p>The report also sets out plans for expenditure on services to residents, repairs and improvements to homes and the provision of new homes taking into account new legal and regulatory requirements.</p> <p>This report also demonstrates how council housing and spending within the HRA supports the council's corporate strategy and objectives.</p>
Recommendations	It is RECOMMENDED that Cabinet recommends that Council agrees:
	<p>(a) The revenue budget for 2026/27 and provisionally for 2027/28 to 2028/29 are set using the following principles:</p> <ul style="list-style-type: none"> (i) That dwelling rents are increased by 4.8 per cent (Consumer Price Index for September 2025 + 1 per cent) from 6 April 2026 in line with the Ministry of Housing, Communities and Local Government Policy statement on rents for social housing. (ii) That garage, garage bases and parking plot rental charges are increased by 4.8 percent from 6 April 2026 and 11 per cent in parts of Poole so that charges continue to align. (iii) That leasehold services are charged to leaseholders in line with actual costs incurred. (iv) That shared ownership dwelling rents are increased in line with lease terms.

	<p>(v) That the changes to service charges are agreed as set out in appendix 2.</p> <p>(vi) That HRA reserves are set at £4.8 million.</p> <p>(b) That the Income and Expenditure budget for 2026/7 and provisionally for 2027/28 to 2028/29 as set out in Appendix 3 is agreed.</p> <p>(c) That capital budgets for 2026/27 and provisionally for 2027/28 to 2028/29 are set using the following principles.</p> <p>(i) That the major project capital programme as set out in Appendix 4 is noted.</p> <p>(ii) That £0.5 million for the acquisition of individual properties (Acquire and Repair) and other annual capital budgets are agreed.</p> <p>(iii) That the planned maintenance programme as set out in Appendix 5 is agreed.</p>
Reason for recommendations	HRA rents and other charges along with the HRA Capital Programme are subject to review and require Cabinet and Council approval for rents and charges to be levied.
Portfolio Holder(s):	Councillor Kieron Wilson – Portfolio Holder for Housing and Regulatory Services
Corporate Director	Laura Ambler – Corporate Director of Wellbeing
Report Authors	<p>Kelly Deane – Director of Housing and Public Protection</p> <p>Seamus Doran – Head of BCP Homes</p> <p>Richard Sumner – Head of HRA Finance</p>
Wards	Council-wide
Classification	For Recommendation

Background

1. The HRA is a ring-fenced account within the council and records the income and expenditure associated with the landlord function in respect of the council's homes. The account is separate from the wider General Fund budget, which is funded by a variety of income flows, including council tax.
2. Each year the council must set rent levels and budgets within its HRA for the forthcoming financial year and provide each individual tenant with at least four weeks' notice of any proposed rent change. This report sets out the proposals regarding the rents, service charges and other charges to tenants as well as the expenditure plans for the 2026/27 rent year.

3. Rents and service charges made to tenants and leaseholders are the main source of income for the HRA. Income can also be derived from other non-domestic rents such as shops, garages and garage bases and plots although this is small.
4. Expenditure includes the management and routine maintenance of existing homes, improvements to existing homes, provision of new homes and interest payments.
5. Council housing within the HRA is situated within Bournemouth and Poole and at the 31 March 2025, comprised 9,606 rented properties 1,163 leasehold properties and 39 low-cost home ownership properties. These are expected to generate an annual income of £57 million. There are no council owned HRA properties in Christchurch as these were transferred to a housing association several years ago.
6. Housing management services to residents are carried out by BCP Homes part of the Housing and Public Protection Directorate. Property maintenance, repairs and asset management sit within the Customer and Business Delivery Directorate. The Housing Delivery Team responsible for the provision of new homes sits within the Development and Investment Directorate. All work closely together to deliver services for residents through the HRA.
7. There are service level governance arrangements through the BCP Homes Strategic Management Board to ensure the effective and efficient delivery of all services to residents.
8. An Advisory Board has been set up to provide oversight of the operational delivery of services and supports decisions on policy and strategic matters. It works in an advisory capacity to the council, working in partnership with residents and provides an additional level of assurance. Board membership consists of councillors, residents and independents.
9. The Council is required by law (Local Government & Housing Act 1989, section 76) to avoid budgeting for a deficit on the HRA. This means the budget must not be based on total HRA revenue reserves falling below zero. In practice the Council is expected to maintain a reasonable balance of HRA reserves to cover contingencies. The HRA will maintain reserves above a minimum level of 5 per cent of expenditure. At the 31 March 2026, the reserve is forecast to be £8.3 million decreasing to £4.8 million by 31 March 2027.
10. HRA major capital project planned spend is included within appendix 4. This includes housing developments approved as part of the BCP Council Newbuild Housing & Acquisition Strategy (CHNAS) as well as indicative budgets for other schemes previously approved. Any further approval required, for example where costs of projects increase, or new projects will be through CNHAS or individual reports to Cabinet.
11. Although this report sets out the budget for 2026/27 and the next two years, there is also a requirement for the council to look at long-term viability of the HRA through a 30-year Business Plan. This has been re-modelled and was presented to Cabinet on the 26 November 2025. It was approved by Council on the 9 December 2025.
12. The HRA budget for 2026/27 is based on the estimates and assumptions set out within the Business Plan. The plan will be updated as and when new information becomes available that impacts these.

National context

13. Previous budget reports have set out the changes to national policy and external factors that have had an impact on costs within the HRA and the way in which council homes are managed and maintained. These include:

- New building safety property compliance regulations
- Improved consumer regulation and complaint handling
- National rent setting policy
- Decarbonisation of council homes
- Decent Homes Standard
- Damp and Mould
- Inflation

Building safety and property compliance regulations

14. Whilst regulatory and legal requirements have been in place for many years to help ensure that landlords keep homes safe, these have traditionally focused on gas servicing, electrical safety, asbestos management, lift, fire and water safety. There was however no routine reporting to external bodies on performance in fulfilling these requirements or demonstrating assurance that these were being met.
15. Like other registered providers of social housing the council is now required to report on building safety performance annually to the Regulator of Social Housing through the Tenant Satisfaction Measures (TSM's). It is also expected that councillors are provide with information to ensure that they have oversight and assurance that regulatory and legal requirements in relation to building safety and property compliance are being met.
16. There is also an increased awareness that there are other areas of property compliance where it is also necessary to provide assurance that regulatory and legal requirements are being met, for example window safety, damp and mould and management of trees. This requires additional resources such as staff, equipment, development of new processes and recording and reporting systems. Additional budgets were set out in the HRA budget report for 2025/26 for staff and the implementation of a new housing management system.
17. The requirements of the Building Safety Act 2022 requires the council to develop [building safety cases](#) for its six-high rise residential buildings and provide these to the Building Safety Regulator when asked to do so in order to receive a building safety certificate.
18. The requirements of the safety case report include how residents in these buildings will be consulted on building safety, kept informed of the risks within their building and how these are being managed. It also includes having an awareness of the needs of residents that might influence risk assessments and how building safety is managed. An additional housing officer is to be appointed to support this work.
19. There will be more time spent on engaging with residents, providing them with accessible information regarding the safety of their building and ensuring that the council is aware of the needs of those living in its high-rise buildings.

20. The requirements for high-rise buildings will be extended to those residential buildings over 11 metres tall in the near future that are included in the council's housing stock.
21. Improvements to fire safety include more in-depth fire risk assessments, setting out fire safety arrangements and sharing information with residents.

Consumer regulation and complaint handling

22. The Regulator of Social Housing (Regulator) has been provided with powers to ensure compliance by social landlords with the regulatory consumer standards. [Regulatory standards for landlords - GOV.UK](#).
23. The [BCP Homes Tenant Satisfaction Measures and Housing Regulatory Compliance Update](#) to Cabinet on the 16 July provided details of the council's performance against the TSM's and set out how it is regulated to ensure compliance with the consumer standards that include safety and quality of homes and engagement with tenants.
24. The Housing Ombudsman has greater powers to ensure that landlords respond to and handle complaints effectively and adhere to its complaint handling code.

National rent setting policy

25. Since 2001, rent for homes let at a social rent have been based on a formula set by government. This created a formula rent for each property based on the relative value of the property as of 1999, relative local income levels, average rents and the size of the property. Landlords were allowed to apply rent increases of Retail Price Index (RPI) + 0.5 per cent. A flexibility was also allowed of +/- £2.00 to help ensure that rents reached the formula rent level, referred to as rent convergence.
26. In 2015/16 a new national policy for rent increases of CPI + 1 per cent was created. The flexibility to enable landlords to reach formula rents was however removed. As formula rents also increased by CPI + 1 per cent, rents for existing tenants that had not converged would remain below the formula rent level. Rents for new tenants could be charged at formula rent and this is something that Cabinet and Council have approved in the past.
27. The majority of new homes are let at social rents as set out above. As at the 31 March 2025 the council also had 375 homes let at an affordable rent. These are rents that must not exceed 80 per cent of the gross market rent (inclusive of service charge) that would be reasonably expected in the private rented sector. Normally the council sets these rents at a level that is also below local housing allowance rates, the maximum amount to which housing benefit or the housing element of universal credit is paid. Although set differently, increase to affordable rents are subject to the same national rent setting policy as social rents.
28. However, from 2016/17 to 2019/20, the government reduced rents by 1 per cent each year. In 2023/24 rent increases were capped at 7 per cent but have since reverted to CPI + 1 per cent. These changes to the rent setting policy have had a significant cumulative impact on reducing the income available to the HRA.
29. In the government's Spending Review 2025 it announced a new 10-year social housing rent settlement from the 1 April 2026 of the consumer Price Index (CPI) + 1

per cent. This creates greater long-term certainty in investing in existing homes and the provision of new homes.

30. As set out above social rents are based on formula rents, but many remain below this. In 2015, the government removed the ability to converge rents charged to tenants towards formula rents, but it is expected to set out its decision on whether rent convergence will be re-introduced. This would provide landlords with the ability to increase rents by an additional amount each year until they reach the formula rent.
31. Amongst the assumptions within the HRA 30-year Business Plan is that rent convergence will allow an additional £1 per week rent increase in addition to CPI + 1 per cent.
32. National rent setting policy also allows landlords some flexibility to set rents at up to 5 per cent above the formula rent (10 per cent for supported housing) for certain properties subject to a clear rationale and consultation with tenants. There is no assumption within the business plan regarding rent flexibility, but this position can be reviewed.

Decarbonisation of council homes

33. The government has set a target for all rented accommodation to have a level C energy performance certificate (EPC) by 2030. It has also set its target to achieve net zero for carbon emissions by 2050 and an ambitious climate change target to cut emissions by 77% by 2035 compared to 1990 levels.
34. To ensure that all council homes meet EPC C by the end of 2029/30, £2.3 million will be invested in capital works for the next four years as set out in the asset investment plan presented to Cabinet on the 26 November 2025. The plan was approved by Council on the 9 December.
35. From 2030/31 onwards a further £2.8 million will be invested each year in continuing to reduce carbon emissions. As set out in the 30-year Business Plan, BCP Homes will develop a comprehensive strategy to assess and prepare for achieving net zero carbon emissions by 2050. This strategy will ensure that it remains aligned with both national and local climate objectives, setting a clear pathway for future compliance and environmental stewardship. All decisions and proposals will be presented to Cabinet for consideration and approval.

Decent Homes Standard

36. Over recent years there have been concerns raised regarding the quality of social homes and that not all were meeting the required standards. The government relaunched a review of the standard in 2023 which is considering:
 - An updated list of items that which must be kept in a reasonable state of repair for a home to be considered decent.
 - An updated list of services that every home must have to better reflect modern expectations for a “Decent Home”.
 - Whether the current Decent Homes Standard sets the right standard on damp and mould to keep residents safe.

- Updates to how the condition of building components – such as roofs and walls – are measured, to make sure that buildings which are not fit for use cannot pass the standard.
37. As a new Decent Homes Standard has not yet been published it is not possible to understand the full cost of meeting the new requirements.
 38. Undertaking stock conditions survey of all council homes informs the planned maintenance requirements to ensure that they remain fit for purpose, that they remain decent and that any hazards such as damp and mould are identified. An accelerated programme of stock condition surveys has been undertaken, and this has contributed to a very high volume of repairs being identified.

Inflation

39. Whilst there has been a rapid increase in inflation over recent years, the costs of for repairs and maintenance and construction materials have increased by significantly more and well above the CPI inflation rate. Inflation may have reduced but it is unlikely that the costs now being incurred are going to reduce to previous levels. This not only impacts on the repairs and maintenance budget but also on the capital expenditure including new homes.

Impact

40. The budget for additional staff to support meeting the council's legal and regulatory responsibilities has been agreed in previous HRA budget reports.
41. The 30-year Business Plan sets out the HRA will manage the impact of these challenges ensuring the long-term sustainability of council housing.

Local context

General fund

42. The HRA does not face the same challenges as the council's General Fund, but it does rely on services provided by the wider council for which it pays for through re-charges.
43. However, service efficiencies and reductions within the General Fund can have an impact on services to council tenants impacting on BCP Home's ability to meet legal and regulatory requirements. Discussions between different services take place to minimise the impact and the HRA has recently supported the retention of play areas where this benefits its tenants and leaseholders.

Housing Management system

44. Legacy arrangements mean that separate IT systems are used in Bournemouth and Poole for the delivery of services to tenants which has an impact on ways of working, procedures, and reporting.
45. Some areas have been aligned to a single system, for example repairs and complaint handling, and a new housing management system has now been successfully procured through an exiting supplier, NEC. Implementation is underway and all services will be off legacy systems by December 2026. New modules will be put in place during 2027.
46. The new system offers the option for more efficient services through on-line services and mobile working.

Regulator of Social Housing Inspection

47. On the 5 August 2025 the Regulator contacted the council's Chief Executive to provide notification of an inspection of the council's landlord service, BCP Homes.
48. The inspection process took place between August and December 2025 working to the following scope set out by the Regulator:
 - Stock quality, decency, repairs & maintenance, and adaptations
 - Health and safety
 - Local co-operation and anti-social behaviour
 - Tenancy
 - Fairness and respect
 - Meeting diverse needs
 - Engagement with tenants
 - Service and performance information
 - Complaints handling
49. The process has involved significant evidence submission, an onsite inspection and follow up discussions to provide assurance of the council's performance against the consumer standards. Onsite work included discussions with the council's new Chief Executive and Directors, the Leader of the council, Portfolio Holder for Housing and Regulatory Services, senior management team from BCP Homes and residents.
50. Upon completion of the onsite work, the Regulator provided some initial very positive feedback. This included:
 - Impressive approach and facilitation
 - Quality of Cabinet and Advisory Board reports
 - Co-regulatory and transparent approach was evident
 - Strong leadership and improvement culture
 - Strong self-awareness of what needed to be done
 - Recognition of the BCP Homes journey – which demonstrates strong performance in alignment and a risk-based approach.
 - The early emphasis on safety and quality of homes was right.
 - Increasing stock condition data within 5 years is important and needs to remain a priority
 - Tenant profile data also a priority to improve
 - Resident engagement and delivery of the newly agreed strategy also a priority
 - Collaborative and positive culture very clear.
51. The Regulatory judgement and grading will be published on the 28 January 2026.

BCP Council's Corporate Strategy

52. The Council's current Corporate Strategy sets out its priorities, the objectives to achieve these, key actions, and measures of success. The services delivered within the HRA support the strategy and the key priorities that make up the Corporate Strategy in many ways as set out below.
53. Services provided through the HRA support the council's key objectives in the following ways:
 - (a) A Tenancy Sustainment team provides help to residents to enable them to sustain their tenancies, look after their homes and prevent homelessness.
 - (b) The Your Money team provides advice to residents on welfare benefits, day to day money management and help to deal with the impact of the rising cost of living.
 - (c) Sheltered Housing helps promote quality of life for residents to live active, independent lives.
 - (d) The provision of good quality, safe, warm and affordable homes.
 - (e) The development and provision of new homes.
 - (f) Helping residents feel safe by dealing with anti-social behaviour, encouraging good neighbourly behaviour, and providing good quality communal facilities.
 - (g) Residents are involved in decision making and shaping services that matter to them.
 - (h) Supporting the wider council to meet the specialist housing need of sometimes vulnerable groups, e.g., the homeless and young people leaving care.
 - (i) Reduction in carbon emissions.
 - (j) Pro-active apprenticeship programme through the inhouse Property Maintenance team.
 - (k) Key role in delivery of homeless solutions and meeting housing need.

HRA Strategic Objectives

54. Following the completion of the 30-Year Business Plan, the Asset Management Plan, and the recent inspection process, BCP Homes is now embarking on the development of a new 5-Year Strategic Plan. This plan will provide an opportunity to review and refresh our strategic objectives, ensuring they remain relevant and responsive to the evolving needs of our residents and the wider community.
55. The new plan will focus on the key priorities identified through our long-term planning and recent regulatory engagement. It will be co-developed in partnership with our Advisory Board, residents, and key stakeholders, ensuring that a broad range of perspectives and experiences inform our direction. This collaborative approach will help us to set clear, actionable priorities and to maintain our commitment to transparency and resident-led service improvement.
56. The 5-Year Strategic Plan is scheduled to be reported to Cabinet in 2026, providing a clear roadmap for BCP Homes as we continue to deliver safe, high-quality, and sustainable homes across Bournemouth, Christchurch, and Poole.

57. It is essential that the new 5-Year Strategic Plan for BCP Homes is closely aligned with the principles and priorities established in the Corporate Strategy, Housing Strategy and 30-Year Business Plan, as well as the annual and medium-term Housing Revenue Account (HRA) budgets. This alignment will ensure that our strategic objectives remain both ambitious and achievable, underpinned by robust financial planning and long-term sustainability.
58. A key consideration in developing the new plan will be to maintain coherence between our long-term vision and the practical realities of annual budget cycles and medium-term financial forecasts. By integrating these elements, we can confidently set priorities that are both forward-looking and grounded in sound fiscal management.
59. The HRA is currently in a relatively healthy financial position, with reserves forecast to exceed the recommended minimum and a strong foundation for future investment. Cabinet can be assured that this stability provides the opportunity to build an ambitious strategy for BCP Homes, supporting the delivery of high-quality, sustainable homes and services for our residents.
60. The strategic objectives for the HRA remain as follows:
- (a) Deliver strong financial management of the HRA through the 30-year Business Plan which maximises the ability to collect income, deliver improvements to existing homes, provide new homes and service outstanding debt.
 - (b) Ensure HRA homes are adequately and efficiently maintained particularly in relation to the council's legal obligation to ensure the health, safety and welfare of its tenants as well as the need to ensure sustainable homes which meet national and local climate emergency targets.
 - (c) Focus on the delivery of effective housing management services to support successful tenancies and strong and sustainable communities.
 - (d) Ensure compliance with regulatory consumer standards to deliver the required outcomes for tenants.

Budget setting

61. The approach to HRA budget setting focusses on three key areas and the following sections of this report take each of these in turn.
- (a) Revenue income expected to be achieved, and proposals around rent and service charge levels for tenants and leaseholders.
 - (b) Revenue expenditure plans that reflect local priorities and service delivery patterns, including revenue contributions to capital
 - (c) Capital expenditure plans that will deliver essential maintenance to the stock as well as ensuring the Decent Homes Standard is maintained, decarbonisation and support the affordable homes new build programme.

Revenue Income

Rents

62. The main source of income for the HRA is from rents charged to council tenants.

63. Rents can only be increased in accordance with the Ministry of Housing, Communities and Local Government Policy statement on rents for social housing. This allows rents to be increased in April each year by CPI the previous September plus 1 per cent.
64. CPI in September 2025 was 3.8 per cent which allows a rent increase of up to 4.8 per cent from April 2026. This will apply to both social and affordable rents.
65. The council can decide to apply a lesser increase, freeze rents, or apply a rent reduction. However, these would have a cumulative, and potentially significant impact on future years rental income and the ability to provide services to tenants, invest in existing homes and provide new homes.
66. Rents charged for council homes remain significantly lower than those charged in the private sector. They are also lower than local housing allowances, the maximum amount to which help with housing costs through housing benefit and universal credit will be paid.
67. Other adjustments that will impact on the level of rental income relate to the number of Right to Buy (RTB) sales expected to occur and the number of days properties are empty during a change of tenancy. During 2024/25, 24 RTB sales were completed and 40 to date during 2025/26. Because of the reduction in the discount available the number of new applications has fallen which will result in fewer RTB sales in the future.
68. The council has a small number of shared ownership properties where residents can purchase part of the property and pay rent on the remainder. Rent increases are based on the terms of the lease provided to residents. The lease used is based on the model form of lease provided by the government which is widely recognised by lenders and solicitors
69. For 2026/27 it is assumed that one per cent of the housing stock will be void at any one time and therefore rent cannot be charged. This reduces the total income expected to be achieved by £0.55 million.
70. Acquisition and new build programmes increase the stock of affordable housing for the HRA. The HRA will reflect the additional income expected from the delivery of new homes from 2026/27. However, there are inherent uncertainties around timescales for new build schemes, but an estimate has been accounted for.
71. Garage rents cover income received from garages. The majority of garages have been transferred from the HRA to the General Fund and those that remain are located on sites identified as potential for re-development. The development on several has now been completed. Garages with potential redevelopment will remain in the HRA alongside garage plots and bases.
72. Rents for garages, bases and plots will increase by 4.8 per cent. This will increase the income received and support the ongoing maintenance of these sites. An additional increase 11 per cent will be made to garages in Poole that are not located within the town centre. This will help with the alignment of charges between across the garage stock.
73. Other rents reflect those charged to tenants occupying commercial space at Trinidad Village. These have been budgeted in line with the lease agreements in place and will increase by RPI on their agreed rent review dates.

Service Charges

74. Leasehold service charges cover costs that are recharged to leaseholders in year to reflect either the cost of maintaining the fabric of the building or the cost of maintaining the communal areas. These charges must reflect the full cost that is incurred by the HRA, but no profit must be achieved through the levelling of these charges. Given this, the income budgets proposed reflect only an indicative level and actual charges will be reconciled during the summer to actual costs incurred.
75. Costs are estimated for 2026/27 with leaseholders receiving details of actual costs at a later date when refunds or additional charges are made.
76. Part of the service charge for leaseholders includes the council's management costs. This covers a wide range of functions such as invoicing and collecting ground rent, apportioning costs, producing statements and dealing with leaseholder queries.
77. Tenant service charges must mirror the charges incurred by the HRA in the same way as leasehold charges. The council is expected to set reasonable and transparent service charges which reflect the service being provided to tenants. Tenants should be supplied with clear information on how service charges are set. In the case of social rent properties, providers are expected to identify service charges separately from the rent charge. Most service charges are expected to be included in affordable rents.
78. Service charges are not governed by the same factors as rent. However, registered providers should normally endeavour to keep increases for service charges within the limit on rent changes, of CPI + 1 percentage point, or 4.8 per cent for 2026/27 to help keep charges affordable.
79. Some work has already been undertaken to align service charges between Bournemouth and Poole which will support the assumptions for increased recovery of costs as set out in the HRA 30-year Business Plan. External advice has also been obtained to help inform decisions on charges to tenants and work has been undertaken towards aligning the calculation of charges. Tenancy agreements for all new tenants have been aligned to help this work, and all existing tenants will have their tenancies varied in early 2026.
80. The service charges for 2026/27 are set out within appendix 2. Any proposals for changes to be made to service charges will require consultation with tenants. Approval of charges is delegated to the Chief Executive, Directors and Officers but to ensure that councillors have oversight in line with regulatory requirements any proposal will be presented to Cabinet. It is anticipated that the review of the charges made will be completed by mid-2026.
81. A service charge cap of £5.00 applied to new charges introduced in Bournemouth several years ago remains in place and it is recommended that this remains in place until charges are fully aligned.
82. Most service charges are eligible for housing benefit or the housing element of Universal Credit.

Revenue Expenditure

83. The HRA manages expenditure that covers delivery of the general housing management function as well as overhead and capital financing charges. This is set out within appendix 3.

Management and Maintenance

84. The financial climate has been very challenging over recent years because of the increase in inflation and rising cost of energy and materials.
85. There are challenges in relation to revenue expenditure:
- (a) Ensuring the effective management of tenancies where tenants have complex support needs.
 - (b) Providing safe homes that meet legislative and legal requirements including those introduced through the Building Safety Act 2022 and Awaabs Law.
 - (c) Delivering against the expectations and requirements of new legislation and regulatory requirements.
86. During 2025/26 the in-house repairs team undertook more repairs than budgeted for. Despite the average cost of a repair carried out by the Property Maintenance team being lower than budgeted. The volume of repairs that had to be referred to third party contractors was also higher than budgeted, contributing to an overall overspend.
87. The accelerated programme of stock condition surveys being undertaken contributed to the high volume of repairs, as has the work being undertaken to address damp and mould issues. The budget for repairs and maintenance has been increased for 2026/27.

Overheads

88. The HRA holds general budgets that meet the cost of other service areas which support the overall delivery of the housing management function. These budgets have also been considered as part of the budget setting process.
89. The HRA recognises recharges for spend directly incurred elsewhere in the Council but that relate to delivery of housing services within the HRA. These include areas such as IT, Human Resources, Finance and Democratic Services. These need to be reflected in the HRA to ensure the full cost of delivering services to tenants is recognised.

Management of bad debts

90. One of the main areas of risk for the HRA going forward is arrears and the management of debt within the rent account.
91. One key current risk is Universal Credit (UC) with approximately 50 per cent of tenants now receiving this benefit. The system is also more complicated than the housing benefit system and requires additional interventions and support from landlords. UC is usually paid directly to the tenant monthly in arrears so four- or five-weeks rent can be owing before the payment is received.
92. BCP Homes will continue to work closely with tenants to assist with financial and budgeting skills and continue to undertake proactive work to help with any issues around their UC claims and advice on day-to-day money management.

93. The bad debt charge is to be increased to £500,000.

Depreciation

94. The HRA incurs an annual depreciation charge. This charge is an estimate of the decrease in value of the housing stock due to wear and tear and damage of the fabric of the stock. The charge is calculated using componentisation, whereby the stock is broken down into components (e.g. kitchen, bathroom, roofing etc).
95. The depreciation budget is set at £16 million.

Reserves

96. The Council is required by law (Local Government and Housing Act 1989, section 76) to avoid budgeting for a deficit on the HRA. This means the budget must not be based on total HRA revenue reserves falling below zero. In practice the Council is expected to maintain a reasonable balance of HRA reserves to cover contingencies. The HRA reserve is forecast to be £8.3 million at the end of 2025/26 decreasing to £4.8 million by the end of 2026/27. This is above the recommended minimum of 5 per cent of total expenditure. This level has been reached after carrying out a risk assessment of key items affecting income/expenditure and allowing for a contingency for unidentified items.

Capital financing

97. The budget to support interest paid on HRA debt will rise in future years as external borrowing is required. For 2026/27 the HRA will require £4.7 million of external borrowing to fund its capital programme.
98. Any surplus generated by the HRA will be used to fund capital expenditure or the provision of new homes. Projections show surpluses maintained in later years but expenditure against these has not yet been scheduled. As set out above there are several pressures on the HRA, notably carbon reduction, and these surpluses will be allocated to support spending.

Capital Expenditure

Major Capital Works Expenditure

99. Major capital works expenditure is forecast to be £43 million for 2026/27. Details are set out within the capital expenditure in appendix 4. The programme includes new capital housing schemes that have already been approved or that are progressing through the approval process in accordance with the council's financial regulations and governance framework. The HRA 30-year Business Plan provides the assurance that new housing schemes are affordable.
100. Appendix 4 sets out the total scheme budget approval. Timing of cash flows for large capital projects spanning several financial years can be difficult to predict and are re-forecast as the projects progress. These projects often require consultation, planning and building control approval and are subject to competitive tendering processes. Capital budgets are carried forward when timing of cash flows becomes more accurate to predict.
101. The HRA is committed to delivering additional affordable housing and ensuring the current HRA land is used as effectively as possible. Whilst the majority of activity is new build, existing properties may also be acquired. These can be via buy back of

RTB properties or where other housing providers are looking to dispose of suitable stock, but these are often unaffordable once improvement work required is factored in. Each new build scheme and purchase is subject to both financial and managerial due diligence to ensure they deliver value for money. The proposals for the provision are approved separately through the annual CHNAS report to Cabinet.

102. The exact tenure mix of this new build programme is to be considered in the context of overall financial viability. Each scheme is required to be viable over the duration of any borrowing period in line with the Prudential Code.
103. There are ongoing new build plans, a requirement to make significant changes to the stock to more adequately meet needs and the HRA must continue to assist in the management of homelessness. This funding can be achieved in part via borrowing additional resource. Since 2018 limits on HRA borrowing were abolished which allows for more to be delivered from HRA budgets where additional funding can now be raised in accordance with the Prudential Code – removing the HRA borrowing cap.
104. Many schemes will also require additional subsidy alongside rental income to meet the borrowing requirements. RTB receipts, HRA reserves, and Section 106 affordable housing developer contributions are also used to help financially support the delivery of new homes, although these funding sources are finite.
105. Feasibility works required to work up scheme plans, employing architects, consultants and instructing desktop and site surveys. These costs are no longer included in the capital programme and are now a revenue costs accounted for in the expenditure within Appendix 3.
106. The Acquire & Repair budget has been reduced but remains to allow for purchasing pre-built homes into the HRA where required.

Planned Maintenance Programme

107. The HRA capital programme aims to ensure first and foremost, that existing homes are fit for purpose and specific projects that will enhance the delivery of social rented and affordable housing are achieved. Each year elements of this stock will need to be replaced or updated to meet the decent homes standard. The delivery of these enhancements is the first call on capital resources and is informed by the Asset Management Plan.
108. There are new areas of work that need to be delivered as part of the planned maintenance programme. Building safety is a key area and additional work will be required to ensure that the homes provided are safe for residents.
109. To support the council's Corporate Strategy there are objectives to ensure that sustainability underpins our policies, tackle the climate change emergency and promote sustainable resource management. This can be achieved through sustainable methods of construction in relation to new homes with high levels of thermal insulation and more energy efficient hot water and heating systems.
110. Energy efficient measures are also provided in the refurbishment of existing homes including more efficient gas boilers, consideration of alternative heat sources, increased levels of thermal insulation, communal heating systems and low energy lighting to communal areas. Such measures often increase development and

refurbishment costs, but more energy efficient homes can benefit tenants through lower energy bills.

111. The planned maintenance programme is proposed at £25 million. A breakdown of the programmes is included within appendix 5 and this will deliver a programme of work that is safe and meets legislative and other priorities.

Consultation

112. There is no legal obligation to consult on the annual rent charges. The rent charges noted in this report for 2026/27 are set by government policy. The proposals for increases to rents and service charges have been considered by involved residents.
113. The Portfolio Holder for Housing and Regulatory Services and the BCP Homes Advisory Board have been consulted.

Options Appraisal

114. This report sets out the proposals for increases in rent and other charges to support the planned maintenance programme, new developments, and major works. The income received is also used to ensure that the council can meet its legal responsibilities as a landlord as well as regulatory standards.
115. The proposals also support the council's wider strategic objectives and demonstrate the importance of HRA activities in helping to meet these while supporting residents.
116. Any decision not to increase charges would have an impact on the ability of the HRA to meet its objectives as set out in the 30-year Business Plan, wider corporate strategic objectives and new legislation and regulation.

Summary of financial implications

117. The proposals with the report will enable the council to maintain its housing stock and to continue to provide services to residents. Proposed rent increases are in line with government policies and the additional income that is generated will support longer term financial planning thorough the 30-year business plan.
118. This plan will ensure that the Council continues to meet its responsibilities as a landlord and in meeting the Council's wider objectives as well as the national agenda to reduce carbon emissions. There are other challenges associated with improvements to building safety and it is important that the HRA can meet these.
119. Failure to increase income to ensure investment in the council's housing stock would have long term implications on the financial health of the HRA.

Summary of legal implications

120. Council housing landlords are required to give 28 days' notice to all tenants of changes to the rental and charges for the new financial year. This will be achieved should all the recommendations be accepted by Cabinet.
121. The Council is required by law (Local Government & Housing Act 1989, section 76) to avoid budgeting for a deficit on the HRA. This means the budget must not be based on total HRA revenue reserves falling below zero. In practice the Council is expected to maintain a reasonable balance of HRA reserves to cover contingencies. The HRA is forecast to maintain reserves of £8.3 million at the end of 2025/26 which

is above the minimum level of 5 per cent of expenditure. The surplus is expected to fall to £4.8 million at the end of 2026/27.

122. Approval from Cabinet and Council is required before changes to rents and other charges can be made as well as commitment to the level of expenditure on planned maintenance and major works.

Summary of human resources implications

123. There are no human resource implications from this report. Previous reports have increased the budget available to ensure compliance with the significant changes in legal and regulatory requirements.

Summary of sustainability impact

124. HRA properties continue to benefit from photovoltaic (solar panels) reducing carbon emissions across the area. The ongoing maintenance of existing stock, such as heating replacement, insulation and low energy LED lighting in communal areas also help to increase the energy efficiency of our existing stock. Consideration is also given to methods of building construction for new homes which would benefit tenants and the local area.
125. Ensuring income for the HRA will support efforts to increase the energy efficiency of homes and to contribute to the reduction of carbon emissions, however this is challenging. The proposals within the report support the long-term improvement in the energy efficiency of the housing stock.

Summary of public health implications

126. The HRA meets the needs of residents with specialist needs with appropriate accommodation, adaptations, tenancy support, affordable rents, well maintained homes and secure tenancies. There is also support for residents to be involved in decision making and community activities. All of this contributes to the physical and mental wellbeing of our residents.
127. The council is expected to provide homes for residents that are safe, warm and free from hazards, particularly damp and mould. There are regulatory and legislative requirements to adhere to in ensuring that this work is carried out. This supports the physical wellbeing of residents and in doing so also supports mental wellbeing.
128. Support and good quality homes provided to residents can reduce the impact on other services provided by the council and other bodies. Services provided through the HRA can also work alongside services provided by others.

Summary of equality implications

129. The recommended increase in rents and service charges will have a financial impact on residents in all the protected groups. However, those in protected groups will also experience positive benefits from the services provided through the HRA.
130. Those residents on low incomes will be eligible for help with rent through housing benefit and universal credit. Rents charged are also lower than in the private sector and are below the local housing allowance rates.

131. Most service charges other than those for personal heating, hot water and water are eligible for housing benefit and universal credit.
132. Most benefits will increase by 3.8 per cent from April 2026 while the state pension will increase by 4.8 per cent. Universal Credit standard allowances are increased by 6 per cent and the two-child limit for claimants will be removed so that families can receive the child element for all children.
133. Support is available for residents to help them to maximise their income and to signpost to other organisations that can also offer support.
134. Proposed revenue budgets for 2026/27 onwards will not impact on front line service provision. The level of disabled adaptations in the estimated Capital Programme should enable us to meet the needs of disabled and older residents to have aids and adaptations fitted to support their independence.
135. Older and disabled residents will be positively affected by investment in dwelling insulation, energy efficiency to help reduce charges for heating and other utilities.
136. There is a clear correlation between effective housing and better health outcomes. By ensuring that housing meets minimum maintenance standards respiratory health issues can be reduced as well as minimising trips and falls. Income is also used for new homes for those in need of affordable housing.
137. Community development work undertaken seeks to minimise isolation, particularly with older people, contributing to improved physical and mental health outcomes and more active communities. We will continue to work with community and voluntary groups, promoting their services and offering practical help where feasible, for example land for community gardens.
138. There are many reasons why tenants may struggle to maintain their tenancies including drug and alcohol problems, mental health and hoarding. We will seek to support tenants in their homes to ensure that they are able to maintain successful tenancies and to reduce the number of evictions. Staff are available who can provide support for tenants including financial advice and work is ongoing to ensure that sufficient resources are available.

Summary of risk assessment

139. From April 2012 the risk in financing the management and maintenance of the housing stock moved from Central Government to Local Government as part of the Self-Financing Settlement Agreement.
140. Future rent increases and decreases are based on a national rent setting policy although this does allow for some flexibilities in the level of rent charged to incoming new tenants.
141. The following considerations must be made:
 - (a) There have been changes over the years to the national rent setting policy as previously set out by the government that have resulted in a long-term reduction in income to the HRA. The new rent policy settlement of CPI + 1% for 10 years from 2026/27 provides additional confidence and assurance regarding income.

- (b) The HRA will be committed in the first instance to the servicing of new and existing debt. Only once debt is serviced (funded) can consideration be given to the maintenance standard of the properties and then in turn to the quality of the housing management service.
- (c) The end of automatic payment of housing costs direct to landlords, has significantly reduce rent income levels and increased the level of rent arrears within the HRA as universal credit. continues to roll out.
- (d) Compliance with regulatory standards and changes to health and safety legislation particularly regarding fire safety provide additional challenges over the next few years and will lead to increased costs.
- (e) The requirement to have an effective HRA 30-year business plan to help prepare and manage future costs and requirements to manage the housing stock particularly in relation to more energy efficient homes and reducing carbon emissions.
- (f) Increased requirements following the introduction of a revised Decent Homes standard.

142. The recommendations presented here assures compliance with the national rent setting policy and the key principles have been approved by the Ministry of Housing, Communities and Local Government. The proposal ensures the appropriate maintenance and development of HRA stock. Not approving this report would significantly risk the ability for BCP Council to comply with central government and national legislation that govern the HRA budget process.

Background papers

None

Appendices

1. The Rent Increase Effect on Residents
2. Service Charges for 2026-27
3. Income and Expenditure Account for 2026-27
4. Major Project Capital Expenditure
5. Capital Expenditure – Planned Maintenance for 2026-27.
6. HRA Balances for 2026-27.

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APPENDIX 1 **Housing Revenue Account** **The Rent Increase Effect on Residents**

		2025/26	2026/27		
		Weekly Rent £	Weekly Rent £	Weekly Increase £	Increase as a %
Overall Average per Budget		109.42	114.67	5.25	4.8%
Bournemouth Neighbourhood		108.63	113.84	5.21	4.8%
Poole Neighbourhood					
Examples of Rent Increases					
General Properties					
<u>Bournemouth</u>					
Hamilton Road	1 Bedroom flat	92.78	97.23	4.45	4.8%
Belle Vue Road	1 Bedroom flat	93.35	97.83	4.48	4.8%
Cunningham Crescent	1 Bedroom flat	89.94	94.26	4.32	4.8%
Turbary Park	2 Bedroom flat	99.57	104.35	4.78	4.8%
Florence Road	2 Bedroom flat	102.41	107.33	4.92	4.8%
Northey Road	2 Bedroom House	112.08	117.46	5.38	4.8%
Ripon Road	3 Bedroom House	134.33	140.78	6.45	4.8%
Turnbull Lane	3 Bedroom House	197.40	206.88	9.48	4.8%
Dolphin Avenue	3 Bedroom Bungalow	134.78	141.25	6.47	4.8%
Cranleigh Road	4 Bedroom House	139.25	145.93	6.68	4.8%
<u>Poole</u>					
Herbert Court	1 Bedroom flat	95.20	99.77	4.57	4.8%
Junction Road	1 Bedroom flat	81.80	85.73	3.93	4.8%
Rockley Road	1 Bedroom flat	91.75	96.15	4.40	4.8%
Serte Court	1 Bedroom flat	88.52	92.77	4.25	4.8%
Cynthia Close	1 Bedroom flat	97.05	101.71	4.66	4.8%
Rodney Court	2 Bedroom flat	111.13	116.46	5.33	4.8%
Plumer Road	2 Bedroom house	112.49	117.89	5.40	4.8%
Christopher Crescent	3 Bedroom house	124.42	130.39	5.97	4.8%
Egmont Road	3 Bedroom house	113.05	118.48	5.43	4.8%
Haskells Road	3 Bedroom house	111.94	117.31	5.37	4.8%
Perry Gardens	4 Bedroom house	139.70	146.41	6.71	4.8%
Sheltered Housing					
<u>Bournemouth</u>					
Cornish Gardens	Studio Flat	79.62	83.44	3.82	4.8%
Castle Dene Court	1 Bedroom flat	93.49	97.98	4.49	4.8%
Southbourne Road	1 Bedroom flat	95.22	99.79	4.57	4.8%
Deacon Gardens Bear Cross	1 Bed Bungalow	106.25	111.35	5.10	4.8%
<u>Poole</u>					
Millfield	1 Bedroom flat	93.64	98.13	4.49	4.8%
South Road	1 Bedroom flat	97.04	101.70	4.66	4.8%
Trinidad House	1 Bed Bungalow	95.24	99.81	4.57	4.8%
Waterloo House	1 Bed Bungalow	111.07	116.40	5.33	4.8%

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APPENDIX 2
Housing Revenue Account
Service Charges For 2025/26

	2025/26 Weekly £	Uplift	2026/27 Weekly £	
1. Garage Rents				
Proposed Charges - Tenants				
Poole Old Town	£14.38	4.8%	£15.07	
Remainder of Poole	£9.18	11.0%	£10.19	
Bournemouth	£14.41	4.8%	£15.10	
Charges - Non-Tenants				
Poole Old Town (excl VAT)	£19.90	4.8%	£20.86	
Remainder of Poole (excl VAT)	£13.52	11.0%	£15.01	
Bournemouth (excl VAT)	£16.97	4.8%	£17.78	
2. Garage Bases - Bmth only				
Charges -Tenants	£3.03	4.8%	£3.18	
Leaseholders	£4.91	4.8%	£5.15	
Private	£5.90	4.8%	£6.18	
3. Garage Plots - Bmth only				
Charges -Tenants	£3.03	4.8%	£3.18	
Private	£3.64	4.8%	£3.81	
4. Sheltered Housing Service Charges inc Lifeline				
General - Poole	£7.95	2.5%	£8.15	
Willow Park - Poole	£7.95	2.5%	£8.15	
Trinidad Village - Poole (Extra Care)	£19.51	2.5%	£20.00	
Belmont Court - Poole (Extra Care)	£19.03	2.5%	£19.51	
5. Care Costs - Poole only				
HB Eligible	£18.88	2.5%	£19.35	
HB Ineligible	£4.73	2.5%	£4.85	
6. Guest Bedrooms in Sheltered Accommodation				
	1 night	2 nights	3 nights	4-7 nights
Cost per room with no ensuite - includes cleaning	£27.00	£37.00	£47.50	£60.00
Cost per room with ensuite - includes cleaning	£32.00	£45.00	£58.00	£72.00
7. Heating Charges				
Poole				
0 bed	£15.71	-42%	£9.11	
1 bed	£13.95 - £22.54	-42%	£8.09 - £17.14	
2 bed	£17.15/£26.61	-42%	£9.95 - £15.43	
3 bed	£31.06/£31.18	-42%	£18.01 - £18.08	
Trinidad Village	£23.55	-42%	£13.66	
Bournemouth	£6.44 - £28.83	-42%	£5.33 - £21.04	
8. Communal Supply				
Poole	£1.50 - £23.55	6.4%	£2.46 - £25.06	
Bournemouth	£0.12 - £7.69	6.4%	£0.18 - £11.94	
9. Laundry				
Bournemouth	£0.88	3.8%	£0.91	
10. Scooter Charges				
Scooter Charge point	£1.20	3.8%	£1.25	
11. Window Cleaning				
Bournemouth	£0.46	-17.39%	£0.38	
12. Communal Cleaning				
Bournemouth	£0.31 - £2.84	5% (increase on average cost)	£0.39 - £3.07	
13. Communal Gardening				
Bournemouth	£0.13 - £5.62	-1% (decrease on average cost)	£0.07 - £7.43	
14. Water and sewage				
Poole	£4.87 - £7.65	0.0%	£4.87 - £7.65	
Bournemouth	£1.28 - £6.92	0.0%	£1.28 - £6.92	
15. Communal Telephone and Internet Charges				
Bournemouth Extra Care only	£2.17	8.76%	£2.36	
16. Communal bulk refuse removal				
Bournemouth	£0.03 - £5.86	32% (increase on average cost)	£0.05 - £7.73	

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APPENDIX 3

Housing Revenue Account - Income & Expenditure Account

	2025/26 Budget £000	2025/26 Forecast £000	2026/27 Budget £000	2027/28 Estimate £000	2028/29 Estimate £000
Income					
Dwelling rents	(54,001)	(54,001)	(57,123)	(59,529)	(61,842)
Non-dwelling rents	(276)	(258)	(270)	(279)	(287)
Charges for services and facilities	(3,768)	(3,588)	(3,464)	(3,551)	(3,622)
Contributions to expenditure	(438)	(549)	(333)	(341)	(348)
Total income	(58,483)	(58,396)	(61,190)	(63,700)	(66,099)
Expenditure					
Repairs and Maintenance	14,031	15,828	16,505	16,809	16,813
Supervision and Management	18,373	17,617	18,833	19,304	20,162
Rent, rates, taxes and other charges	447	382	337	345	354
Bad or doubtful debts	400	400	500	500	500
Total expenditure	33,251	34,227	36,175	36,958	37,829
Net operating (surplus) / deficit	(25,232)	(24,169)	(25,015)	(26,742)	(28,270)
Capital charges					
Debt management costs	377	380	389	399	409
Depreciation	15,300	15,300	16,000	16,498	17,025
Net interest payable	5,425	4,725	5,475	5,725	6,596
Total capital charges	21,102	20,405	21,864	22,622	24,030
Net (surplus) / deficit	(4,130)	(3,764)	(3,151)	(4,120)	(4,240)

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APPENDIX 4

Housing Revenue Account - Capital Expenditure

	Total Scheme Budget £000	Prior years spend £000	2025/26 Forecast spend £000	2026/27 Budget £000	2027/28 Estimate £000	2028/29 Estimate £000	TOTAL COST £000
Completed Schemes							
Craigmore Ave	646	327	274	45			646
Grants Close	597	261	315	21			597
Poole Town Tower Block Works (Project Admiral)	22,077	1,400	93				1,493
	23,320	1,988	682	66			2,736
Schemes Under Construction/Approved							
Templeman House	6,020	2,598	3,355	67			6,020
Hillborne School Development	33,360	10,560	18,197	4,140	463		33,360
Surrey Road	3,518	244	2,351	923			3,518
Hawkwood Road	21,809		2,200	11,733	7,876		21,809
	64,707	13,401	26,102	16,863	8,339		64,706
Approved budgets for schemes under consideration							
		100					
Constitution Hill	1,425	445	675	305			1,425
Oakdale (infill)	345	98	129	119			345
	1,770	543	804	424			1,770
Future schemes							
30-year business plan projection					8,406	8,658	17,065
	0	0	0	0	8,406	8,658	17,065
Other annual capital budgets							
Planned Maintenance (see Appendix 5)	17,102		16,602	24,920	26,340	29,000	96,862
Acquire and Repair	500		181	500	500	500	1,681
Estates capital works	100		100	160	100	100	460
Supported Housing capital works	0			100	100		200
Vehicles	0		50	50	50	50	200
	17,702		16,933	25,730	27,090	29,650	99,403
Total HRA Capital Expenditure	107,499	15,932	44,521	43,083	43,835	38,308	185,680

Housing Revenue Account - Funding of Capital Expenditure

	2025/26 Forecast £000	2026/27 Budget £000	2027/28 Estimate £000	2028/29 Estimate £000	TOTAL FUNDING £000
Funding sources					
HRA Reserve	5,867	6,680	3,500	5,000	21,047
HRA Major repair reserve	16,845	16,394	16,498	17,025	66,762
HRA capital receipts (Right-to-buy)	4,061		1,681	1,732	7,474
HRA capital receipts (Shared-ownership sales)	1,200	3,564	463		5,227
Government Grants	6,660	11,733	5,253	2,598	26,244
S106	277				277
Prudential Borrowing	9,610	4,712	16,440	11,953	42,715
Total	44,521	43,083	43,835	38,308	169,746

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APPENDIX 5

Housing Revenue Account - Capital Expenditure - Planned Maintenance

	2025/26 Budget £000	2025/26 Forecast £000	2026/27 Budget £000	2027/28 Budget £000	2028/29 Budget £000
Windows	2,300	2,000	780	1,710	1,590
Bathroom Refurbishments	700	800	390	350	450
Kitchen Refurbishments	2,500	3,200	3,680	3,990	3,050
Disabled Adaptions	1,400	1,400	1,400	1,450	1,440
External Works	1,000	1,000	2,020	2,240	2,970
Fire Precautions / Detectors	800	800	550	570	570
Boiler Replacements	1,300	1,300	1,230	1,290	1,030
Re-roofing	1,000	500	1,670	1,650	1,490
Doors	750	700	950	350	1,350
Bedroom Extensions	120	100	100	100	100
Hot Water Systems	100	100	50	50	50
Rewiring	400	300	2,200	2,290	2,290
Common Areas (internal)	200	100	660	590	850
Communal System	40	40	100	100	100
Upgrading of Lifts	375	150	1,260	1,300	1,390
Door Entry	250	200	100	100	100
Ventilation System	100	70	60	60	60
Central Heating	140	150	480	440	1,950
Structural Repairs	85	70	300	310	310
External Lighting	20	10	50	50	50
Electric to Gas Conversions	40	40	50	50	50
Environmental Improvements	80	200	270	280	280
Minor Works	180	500	800	1,050	1,530
Warden Call out	100	50	300	310	310
Damp & Mould	500	700	500	520	520
EPC to C works	1,200	1,200	2,300	2,380	2,370
Capitalised salaries	922	922	910	940	940
Contingency	500		1,760	1,820	1,810
Total Planned Maintenance	17,102	16,602	24,920	26,340	29,000

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APPENDIX 6

Housing Revenue Account - HRA reserve balances

	2025/26 Budget £000	2025/26 Forecast £000	2026/27 Budget £000	2027/28 Budget £000	2028/29 Budget £000
Opening reserves and capital receipts					
HRA reserve	(6,379)	(10,445)	(8,342)	(4,813)	(5,433)
Major Repairs Reserve	(1,822)	(1,939)	(394)	0	0
RtB receipts for re-provision	(7,033)	1,400	(9,044)	(9,544)	(8,363)
Other capital receipts	0	(557)	0	0	0
Total opening reserves and capital receipts	(15,234)	(11,541)	(17,779)	(14,357)	(13,796)
HRA Reserve					
Bought forward balance at 1st April	(6,379)	(10,445)	(8,342)	(4,813)	(5,433)
Surplus for the year	(4,130)	(3,764)	(3,151)	(4,120)	(4,240)
Contribution to capital expenditure (RCCO)	1,922	5,867	6,680	3,500	5,000
Carried forward balance at 31st March	(8,587)	(8,342)	(4,813)	(5,433)	(4,673)
Major Repairs Reserve					
Bought forward balance at 1st April	(1,822)	(1,939)	(394)	0	0
Depreciation for the year	(15,300)	(15,300)	(16,000)	(16,498)	(17,025)
Utilised to finance capital expenditure	17,122	16,845	16,394	16,498	17,025
Carried forward balance at 31st March	0	(394)	0	0	0
RtB receipts for re-provision					
Bought forward balance at 1st April	(7,033)	(7,605)	(9,044)	(9,544)	(8,363)
Current year RtB receipts for re-provision	(1,500)	(5,500)	(500)	(500)	(500)
Utilised to finance capital expenditure	2,845	4,061	0	1,681	1,732
Carried forward balance at 31st March	(5,688)	(9,044)	(9,544)	(8,363)	(7,131)
Other capital receipts, grants & S106					
Bought forward balance at 1st April	0	(557)	0	0	0
Current year receipts	(10,973)	(7,580)	(15,297)	(5,716)	(2,598)
Utilised to finance capital expenditure	10,973	8,137	15,297	5,716	2,598
Carried forward balance at 31st March	0	0	0	0	0
Closing reserves and capital receipts					
HRA reserve	(8,587)	(8,342)	(4,813)	(5,433)	(4,673)
Major Repairs Reserve	0	(394)	0	0	0
RtB receipts for re-provision	(5,688)	(9,044)	(9,544)	(8,363)	(7,131)
Other capital receipts	0	0	0	0	0
Total closing reserves and capital receipts	(14,275)	(17,779)	(14,357)	(13,796)	(11,804)

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Revised Local Validation Checklist Cabinet Report



Report subject	Revised Local Validation Checklist
Meeting date	4 February 2026
Status	Public Report
Executive summary	<p>This report sets out the background to local validation lists including what they are, the necessity for every local planning authority to have one and the importance of it being regularly reviewed, kept up to date and tailored to current local planning policy.</p> <p>The national requirements for the content of a planning application are prescribed by</p> <p>legislation and are limited to a small number of documents and other supporting information which is mandatory. For this reason, legislation also enables local planning authorities to go further and supplement the national requirements with their own local requirements in the form of a 'local validation list' (sometimes referred to as a 'local validation checklist'). Once a local validation list has been adopted and published it is legally binding; an applicant is then obliged to submit the information set out in the local validation list when the application is first submitted and if they do not, the council can refuse to validate the application until that information is provided.</p>
Recommendations	<p>It is RECOMMENDED that:</p> <ol style="list-style-type: none"> 1. The Local Validation Checklist be adopted and; 2. Minor variations to the Validation Checklist are delegated to the Director of Planning and Transport in consultation with the Head of Planning Operations and Head of Strategic Planning.
Reason for recommendations	<ol style="list-style-type: none"> 1) To put in place an up to date and enforceable local validation checklist to provide certainty for applicants and officers in the submission and processing of applications. 2) To enable adaptations to the local validation checklist in light of changes in legislation/ policy and to remedy any unforeseen circumstances found during the operation of the checklist.

Portfolio Holder(s):	Councillor Millie Earl, Leader of the Council and Chair of Cabinet.
Corporate Director	Glynn Barton, Chief Operations Officer
Report Authors	Katie Herrington
Wards	Not applicable
Classification	For Decision

Background

1. When a planning application is first received, it must go through a validation process to ensure that the minimum level of information requirement by statute is present. Only when that minimum level of information has been received by the council can the application be validated, made public and the process of consultation and assessment begin.
2. It should be noted that the accuracy of the information supplied is the responsibility of the applicant. There are specific requirements in the Town and Country Planning Act 1990, that local planning authority shall not entertain an application unless the requirements are met. Any person who knowingly or recklessly issues a false or misleading certificate is guilty of an offence. It is therefore the responsibility of the applicant to ensure certificates are completed accurately and with the appropriate evidence in place to support if requested.
3. The validation requirements take the form of National and Local Lists. The national validation requirements, as predominantly set out in the Town & Country Planning Development Management Procedure Order 2015 (as amended), are limited to:
 - The application form;
 - the correct application fee;
 - existing and proposed plans/drawings;
 - ownership certificate;
 - a Design & Access Statement (in certain circumstances);
 - an Environmental Statement (if EIA development);
 - biodiversity net gain information (if a liable application); and
 - a Fire Statement (in certain circumstances in relation to tall buildings)
4. BCP has a local validation checklist that is published on its website. The benefit of Local Validation Checklists is that it means we can request additional information beyond that of the National List.
5. NPPF paragraph 45 sets out that for a local authority to require additional supporting information that this must be specified on a formally adopted local list/ validation check list which has been published on its website less than 2 years before an

application is submitted. However, as this was created in 2021 it is now out of date and was not formally adopted.

6. This report seeks formal approval for a new local validation checklist.

Review of the existing Local Validation Check List

7. A review of the existing Local Validation Checklist (LVC) was undertaken to see whether any changes were required. The existing Local Validation Checklist pulls together the policy requirements from the 3 legacy local plans, and comprises a single advice note and 47 individual checklists each addressing a particular application type, e.g. householder or householder application in a Conservation Area. These are presented as a list under application categories.
8. Whilst having a single checklist for a particular application is useful, having them stored as lists online is difficult to navigate. The quantum of such lists also makes it difficult for officers to keep such lists up to date.
9. Each checklist comprises a list of national requirements and then local requirements. These local requirements are broad and list a whole range of possible information required for a submission. However, the local list requirements are worded subjectively – e.g. they are only required if they are ‘relevant’ to the proposal. In practice, this has resulted in uncertainty and delay for both applicants and officers assessing the validity of applications, with validation officers asking Planning Officers whether some information is required or not. This has also resulted in differences in requested information across the teams, creating inconsistency.
10. Uncertainty and delay to the planning process are well versed criticisms of the planning process, and any new Local Validation Checklist must seek to reduce these.

New Validation checklist

11. The New Local Validation checklist (**Appendix 1 and 2**) is designed to address the downsides of the current local validation checklist and update it towards current planning requirements. The multiple checklists have been removed to provide a matrix (**Appendix 2**) and a single document with both guidance and checklists (**Appendix 1**).
12. The checklists seek to address the uncertainty and inconsistency by providing clear and objective document or plan requirements. It does this by requiring documents based on application type, local plan location, and designation based on mapping.
13. This clear and objective approach also enables the ability for the Local Planning Authority to charge to recoup the costs associated with processing invalid applications¹. A more discretionary checklist would bring too much ambiguity for such an approach to succeed.
14. Whilst this provides certainty for both applicants and agents to what information is required to validate an application, it removed the ability for officers to require bespoke information upfront before the 8/13/16 week timescale starts. For instance, the officer may be aware that there is a bat roost on the site, but there is no

¹ The charging schedule and justification for such will be subject of a separate cabinet report.

requirement for a bat survey to be submitted in order for the application to be validated. The officer will need to either need to ask for the report during the processing of the application or refuse it on that basis, ultimately causing delay. However, the council has a pre-application service that applicants can use if they are unsure of what other information may be required outside of the local validation checklist.

15. Information requested with a planning application must meet statutory tests introduced by the Growth and Infrastructure Act. The requirements have been assessed taking this into account.

Consultation

16. A consultation was undertaken for planning officers and internal consultees in April 2025 (with no end date) including; Business Support (the validation team), all planning officers, trees, urban design & Heritage, and Policy. Following feedback, the checklist was amended and was reconsulted internally in June 2025 to planning officers; BNG/Biodiversity; Flooding and Drainage; and the Council's geoengineer. The checklist was amended and then reconsulted with team leaders in September 2025.
17. The checklist was published on the Council's Website, and an email went out to agents consulting on their views on the 6 October 2025 which ended on the 17 November 2025.
18. A summary of the feedback received is set out in **appendix 1**. These have been taken into account, and the checklist has been amended accordingly.

Options Appraisal

19. The options are to;
 - a. Keep the existing local validation checklist and adopt it in its current form. This is not advised as its local requirements are now out of date.
 - b. Adopt the proposed new local validation checklist.

Summary of financial implications

20. The new Local Validation checklist is worded to enable applications to remain invalid if they have not paid a relevant fee. This new validation checklist does not result in additional cost or itself result in additional payments. As such, the local validation checklist is not considered to have any financial implications.

Summary of legal implications

21. Legal services have been consulted on the Local Validation checklist but have raised no objections.

Summary of human resources implications

22. The New Validation Checklist is designed to improve efficiency at the validation stage of the planning process and therefore will result in efficiencies with the relevant Business Support Team. This local validation checklist will result in changes

to what is provided to officers as part of their planning applications. However, such changes are unlikely to result in material changes in human resource.

Summary of sustainability impact

23. Several requirements in the Local Validation Checklist relate to climate /sustainable/nature policies which ensures impact in these areas are considered within the planning application process. The associated aim is to mitigate negative implications and improve sustainable development within the area.

Summary of public health implications

24. The proposal is unlikely to have a material impact upon public health.

Summary of equality implications

25. A full EIA screening document has been completed and approved by the EIA panel - [EIA](#)
26. The Impact assessment summary sets out that the benefit of the change to the Local Validation Checklist is that it provides an up-to-date local validation checklist that is more objective in its requirements than that set out before. The key identified impacts are set out below;
27. **Visual impairment:** this is a document and there may be people with visual impairments seeking to use it. Therefore, it must be able to be read by relevant adaptive software (text to word). The document is shorter, and the checklists are presented as a list in the appendix which is easier to find and use such software with than the existing multiple separate PDF lists.
28. **Socio-economic :** The checklist includes a provision to allow an application to be invalid if relevant fees are not paid. This includes if the application is invalid or submitted by email. This could increase the cost of the service for those users if the checklist is not clear. (the fees themselves and the principle of charging will be subject to a separate cabinet report). The limited discretion requires applicants/ agents to provide more information upfront which whilst assists with the smooth determination of the application has a cost implication. Obtaining scaled plans can be expensive, particularly for the public seeking improvements to their home. Taking this into account, householder applications do not have to provide scaled drawings, but they must be of a reasonable likeness and include dimensions.
29. **Neurodivergent :** Those who are neurodivergent may need to use the document. This means that the document needs to balance the need for information with clarity, simplicity and flexibility. The checklist is less discretionary than the current, setting out clearly what documents are required and when. The checklist itself is shorter and in a list form and in a visual matrix. This is easier to 'see' and navigate
30. The document is worded, where possible, in 'plain English' and navigable. The visual matrix is more accessible for those with more visual brains. The checklist is also 'text to word' enabled should this be a preferable way of processing

information. The checklist, being more objective, could remove some flexibility and officer discretion as part of the checklist.

31. **Digital divide** - The local validation checklist is an online only document, so those with issues accessing internet (socio-economic status/ age/ disability) may struggle to view it. This is the current situation and a result of the current council wide protocol to move away from paper copies. However, officers still have discretion to accept lesser or alternative information where reasonable and necessary, considering the EIA needs of the applicant.

Summary of risk assessment

32. The current Local Validation Checklist is out of date and is not adopted, and relying on it to invalidate applications or require additional information beyond the National Validation Checklist risks challenge to the council, with monetary and reputational costs.
33. The proposed validation checklist seeks will provide a clear and objective local validation checklist and can be relied upon to require such additional information. There is a risk that the nature of the checklist will mean that some additional information is required during the application process causing some delay. However, it is considered that overall the provision will provide consistency and certainty at the start of the application process to its benefit.

Background papers

- Existing local validation checklist (Published work)
- National Planning Policy Guidance: Validation (Published work)

Appendices

Appendix 1: proposed new Validation checklist

Appendix 2: Proposed new Validation checklist Matrix

Appendix 3: Summary of Consultation Comments.



Local Validation Checklist

DRAFT SEPTEMBER 2025

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Introduction

To apply for Planning Permission or Consent, you will need to submit an application.

The LPA will assess whether the information submitted meets the national and local requirements. This document sets out what those national and local requirements are for the most common planning application types.

Some information is required in order for the officer to consider your proposals, but does not form part of the nationally set out validation check list. Not having such information upfront can cause delay to the determination of the planning application. The Local Validation Checklist is designed to assist you and our officers in having as much information as reasonably possible upfront that is required in order for the expedient determination of your application. Such additional information is based on local plan or other material designations

However, we are not able to pre-empt all requirements, and some are likely to be ascertained only after consultation responses have been received or after the officer has reviewed the case. Our [pre-application service](#) will help you understand what these are likely to be, but some guidance is provided within the 'information that may be required or requested' section of this report. Please note our '[customer charter](#)' that sets out the Council's approach to accepting additional or revised plans during the processing of the planning application.

This document explains what is required to help you make a better application and for you to establish what may be required upfront, in the aim for a higher quality and more expedient planning service.

Changes since the 2021 Local Validation Checklist

BCPs Local Validation Checklist has been redeveloped to make it easier to navigate and interpret, to create greater consistency and clarity in what is required for your planning application to be validated. The trade off for this is that there is likely to be an increase in requests for information during the planning application stage, where such information could only be ascertained through consultation responses and officer knowledge. However, such instances can be avoided through use of the council's pre-application or PPA services.

The validation requirements for EIA developments, in addition to those set out in the National Requirements List, are to be determined by the determining officer. It is strongly advised that Pre-application discussions (via a Planning Performance Agreement (PPA) or otherwise) have been undertaken along with a screening and scoping assessment to achieve a more expedient validation outcome.

- Removal of the separate checklist lists
- Creation of a single interactive document
- Altered website

- Altered requirements;
 - Requirement of completion of BNG statement form for full and outline planning applications
 - Requirement to complete 'Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements' for developments within the 'Cliff instability zone'.
 - Clarity over requirements for 'redline' plans
 - Explicit requirement for draft UU and payment of S106 upfront for all residential schemes, unless declaration signed acknowledging scheme refusal.
 - If Affordable housing required but argued to be non-viable, DVS fee to be paid upfront, unless signed acknowledging scheme refusal.
 - Bespoke validation requirements for EIA development, determined by the determining officer.
 - No longer accepting paper copies of planning application submissions.
 - Introduction of fees.
 - Nutrient neutrality – if within relevant catchment require submission of statement and relevant calculator

Validation Matrix

The validation matrix is a visual tool to help applicants understand what is required to determine their planning application.

The visual version is in Appendix 1, and can be downloaded here.

Pre-application Service

The local planning authority offers a chargeable pre-application advice service which applicants are encouraged to use before applying for planning permission. Details of how to make an enquiry and can be found on our website:

<https://www.bcpccouncil.gov.uk/Planning-and-building-control/Apply-for-planningpermission/Pre-application-advice/Pre-application-advice.aspx> The guidance document includes details of fees and what to submit:

<https://www.bcpccouncil.gov.uk/Planning-and-building-control/Apply-for-planningpermission/Pre-applicationadvice/Docs/pre-app-guidance-notes-final-version.pdf>

National and Local Requirements

The list below contains details of the national and Local requirements for the validation of planning applications at BCP. The National Requirements can be viewed here [Making an application - GOV.UK](#).

General requirements

Application forms and fees

Application form

This can be completed on-line using the Planning Portal
www.planningportal.co.uk/apply

PDFs can be downloaded from the Planning Portal
www.planningportal.co.uk/info/200126/applications/61/paper_forms or obtained from our Customer Contact Centre. These can be emailed to planning@bcpCouncil.gov.uk. Please note that there may be a fee for the submission of applications by email.

The Council are no longer accepting paper copies of planning applications e.g. that have been posted to the council or handed in.

Ownership and Agricultural Land Certificates

Where included on the application form ownership certificates A, B, C or D must be completed. The 'owner' is anyone with a freehold interest or a leasehold interest where the lease is 7 years or longer.

A notice to all owners must be completed and served in accordance with.

- Certificate A should only be signed where the applicant and the owner are the same individual or organisation.
- Certificate B should be completed and notice served on all owners in all instances where the applicant is not the only owner of land or does not own the site. It is not sufficient to only inform the management company. **This includes flats.**
- Certificate C should be completed if the applicant does not own all of the land to which the application relates and does not know the name and address of all of the owners and/or agricultural tenants. [Notice 1](#) must be completed and sent to all known owners and/or agricultural tenants. Where the owners or agricultural tenants are unknown, [Notice 2](#) must be published in a local newspaper.
- Certificate D should be completed if the applicant does not own all of the land to which the application relates and does not know the names and addresses of any of the owners and/or agricultural tenants. [Notice 2](#) must be published in a local newspaper. A copy of the notice should be sent with the application to the local authority.

This includes a requirement to serve notice on the husband/wife/partner if land is jointly owned but only one of them completes the application.

It also includes a requirement to serve notice where the applicant is an individual and a company owns the land (regardless of whether the applicant is the sole director) or where the applicant is a company to serve notice on the all the directors of that company. If the proposed extension or building will be attached to a neighbouring property, and either the foundation, wall or roof over sails the boundary or butts up to the boundary then you will need to serve notice on the owner of the neighbouring land. This is likely to be the case if the application is for a terraced or semi-detached property. Where Certificate C or Certificate D is completed because notice cannot be served on all the owners, the local newspaper that you will need to publish a notice in within 21 days of the date of application is the Bournemouth Echo. Notice must also be served on any agricultural tenants. Applicants must certify that they have notified any agricultural tenants about their application, or that there are no agricultural tenants on the site. This certificate is required whether or not the site is an agricultural holding and is now combined with the ownership certificates on the standard application form where it applies.

Further information about ownership certificates can be found in the government's published Planning Practice Guidance (PPG): [Making an application - GOV.UK](#)

Fees

The correct fee must be paid when the application is submitted.

The Planning Portal website includes a fee calculator [Planning Portal](#)

If an application is submitted via the Planning Portal website the fee payment must be made to the Planning Portal, including their administrative fee.

Fees can only be paid directly to the local authority if the application is emailed directly to us. There may be a local fee to cover the cost of processing the application. A fee may also be applied if your application is found to be invalid, to cover the cost of seeking the required documentation. In such instances the invalidity fee must be paid before the application can be made valid. The application cannot be validated without payment of such fees.

CIL Forms

For proposals that are for CIL liable developments, a **CIL Additional Information Requirement Form** will need to be completed for any applications which are CIL liable. BCP only charges CIL for new dwellings.

[cil_questions.pdf](#)

Plans

All plans and documents must be submitted in PDF format. Photos or other formats cannot be accepted. The exception is the BNG Metrics that must be submitted as a excel document.

Location Plans

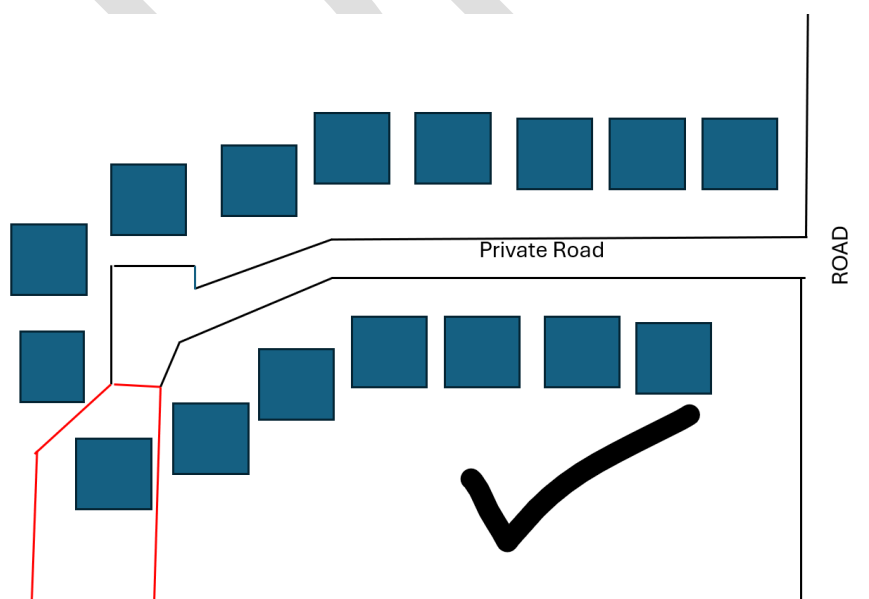
Scale: Must be of a scale of 1:1250 (scaled to fit A4 or A3 paper) with a scale bar, north pointer and showing a minimum of **two named roads and surrounding buildings**.

Redline: The application site (to which your proposal relates) should be edged clearly with continuous a red line.

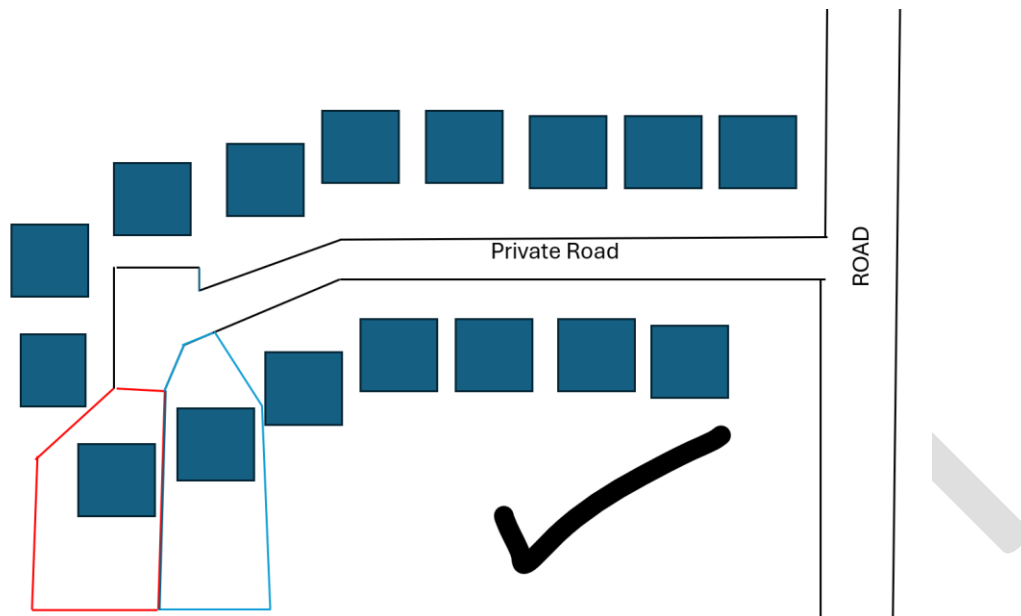
Your red line boundary should include the entire proposal site, i.e., land required for access to the site, car parking, gardens, and other outbuildings around the site, such as garages.

For all applications, whether for residential, rural, or commercial developments, it is vital to show the site's access to roads that link to the public highway and that this is included on the plan itself.

The redline can abut the pavement rather than the road, unless the development proposals require work to the pavement – e.g. a dropped curb. In those cases the redline must include the pavement to the highway.



Blue Line: A blue line should be drawn around any other land owned or controlled by the applicant, close to or adjoining the application site.



Where to purchase: Location plans can be purchased from one of the Planning Portal's accredited suppliers:

www.planningportal.co.uk/homepage/4/buy_a_planning_map

Format: All plans and documents must be submitted in PDF format.

Copyright: We will not accept plans submitted that do not comply with copyright law. For example, Land Registry plans or unlicensed Ordnance Survey maps will not be accepted as site location plans, and your application will be made invalid if such is submitted.

Block Plan/Site Plan

Scale and orientation: Must be a Scale 1:500 or 1:200 accurately showing:

- The direction of North
- The proposed development in relation to the site boundaries and other existing buildings on the site, with written dimensions to the boundaries
- An accurate and annotated scale bar

Details to include where relevant:

- All the buildings, roads and footpaths on land adjoining the site including access arrangements

- e) All public rights of way crossing or adjoining the site
- f) The position of all trees on the site, and those on adjacent land
- g) The extent and type of any hard surfacing
- h) Boundary treatment including walls or fencing where this is proposed

Purchase: Block plans can be purchased from one of the Planning Portal's accredited suppliers: www.planningportal.co.uk/homepage/4/buy_a_planning_map
Please ensure that any plans submitted comply with copyright law.

Existing and Proposed Elevations and floor plans

Required so that officers can clearly see changes.

For all application types (excluding householder) must be scaled (1:100 or 1:50)

For Householders and householder related Lawful Development Certificate (LDC) applications, these can be drawn by hand but must be a reasonable likeness AND include dimensions.

Format: All plans and documents must be submitted in PDF format.

Ground levels, existing and proposed (as datum points)

Where excavation is proposed (beyond that required for foundations). These must include datum points where ground levels are shown.

Format: All plans and documents must be submitted in PDF format.

Section Plans

Provided for schemes including swimming pools. These must be dimensioned (1:50 or 1:100). Where ground levels around the pool are to be changed, then a levels plan must be included.

Format: All plans and documents must be submitted in PDF format.

Existing and proposed car parking plan

Required if the proposal will alter or change the car parking and access arrangements e.g. create or alter vehicle and/or pedestrian access; widen visibility splays; add or alter parking spaces. These must be scaled (1:50 or 1:100).

Format: All plans and documents must be submitted in PDF format.

Roof Plans

If any roof would be created or altered by the proposal. These must be scaled (1:50 or 1:100).

Format: All plans and documents must be submitted in PDF format.

BNG

Unless exempt, developers in England are required to provide 10% BNG on all habitats within the redline boundary of their development, whether or not they are impacted. [Separate arrangements apply to on-site irreplaceable habitat.](#)

For off-site gains and significant on-site gains, you must maintain the habitats you create or enhance for a minimum of 30 years. The responsibilities will be set out in a [legal agreement](#).

Biodiversity Net Gain Statement

Required to be completed and signed for **all** applications, with the exemption of Householder Applications, Prior Approvals, Certificate of Lawful Developments. This is to assist officers in the assessment of BNG.

link to document here - and in Appendix 2.

Format: All plans and documents must be submitted in PDF format.

Biodiversity Metric

The [statutory \(official\) biodiversity metric calculation tool](#) must be used in order to demonstrate that you have calculated the number of biodiversity units for existing habitat or habitat enhancements in accordance with the statutory biodiversity metric.

If your development has to meet [mandatory biodiversity net gain \(BNG\) requirements](#), it will need to use the metric tool.

The requirement to use the biodiversity metric will take effect at different times, depending on the size of the development. The relevant metric tool should be used for:

- major developments
- small developments
- nationally significant infrastructure projects from May 2026

You can choose to use a simpler version of the metric tool, called the [small sites metric](#) (SSM) if your development meets the criteria to do so.

Except for small developments using the SSM, a developer or land manager should hire a competent person such as an ecologist to use the metric tool and advise on the metric tool's calculations. The local planning authority (LPA) will review submitted calculations and may reject them if they do not believe they have been completed by a competent person.

An ecologist can enter information into the metric tool about the existing habitat and any planned development or enhancement. The metric will calculate the biodiversity value of the habitat, and how a development, or a change in land management, will

change the biodiversity value. For example, the metric can measure the impact of building houses, planting a woodland or sowing a wildflower meadow.

Early and repeated use of the metric tool can help:

- assess a site to find the number of biodiversity units an existing habitat has – its biodiversity value
- compare BNG proposals for a site - such as [creating or enhancing habitat, on-site or off-site](#)
- plan habitat management decisions that promote biodiversity

For more information, please visit - [Calculate biodiversity value with the statutory biodiversity metric - GOV.UK](#)

Habitat Management and Monitoring Plan (HMMP)

A draft Habitat Management and Monitoring Plan should be submitted with non-BNG exempt proposals.

There's a set of [HMMP tools](#) including templates, a checklist and companion guides, to help you write your HMMP.

The HMMP template is a guide with a structure to help you show details of your project. You do not need to fill in every section as not all of it will be relevant to you. It's suitable for significant on-site enhancements and for off-site gains.

The template's companion document lists habitat condition and assessment criteria.

There is a separate template and habitat guide for [small developments](#).

For further information, please see - [Creating a habitat management and monitoring plan for BNG - GOV.UK](#)

Design and Access Statement

A Design and Access Statement is a concise report accompanying certain applications for planning permission and applications for listed building consent.

Further details of what the design and access should contain are provided [here](#)

A Design and Access Statement is required for the below applications;

- Major Planning Applications
- Applications in a Conservation Area AND
 - 1 or more dwellings
 - Building(s) with a floor space of 100sqm or more
- Applications for Listed Building Consent

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Application type specific requirements

Residential developments

Affordable Housing Statement

When Required: Where 10 or more new or additional units of residential accommodation will be created or where 9 or less units are proposed and the site area is 0.5 hectares or more.

This form must state:

- Whether or not the scheme would provide affordable housing
- On site or as a contribution
- Mix
- Tenure

Draft S106: The Submitted UU request must also include provision of AH.

Affordable Housing viability assessment plus payment of external assessor fee

When required:

Where 10 or more new or additional units of residential accommodation will be created or where 9 or less units are proposed and the site area is 0.5 hectares or more.

Where it is stated in the **Affordable Housing Statement** that the scheme cannot viably provide affordable housing then the submission must be accompanied by a

- Affordable Housing Viability Assessment.
- Payment of the initial appropriate fee for independent external assessment.

If the applicant does not want the Affordable Housing Viability Assessment to be independently assessed and/or does not want to pay the fee, **then the applicant will be required to state in their Affordable Housing Statement that they understand that the proposal would not accord with development plan policies in that regard and is likely to be considered unfavourably.**

Developments Requiring Environmental Impact Assessment (EIA)

Environment Statement

When Required

Will be required for all developments falling within Part 1 or Part 2 of the EIA Regulations.

Minerals & Waste Developments

Planning Statement

Whilst this is only a validation requirement for Mineral and Waste schemes, they are a helpful tool for officers in the assessment of planning applications more generally.

A planning statement can provide an overview and explanation of a proposal. It can include an assessment of how the proposed development accords with relevant national and local planning policies

Land registry Documents

A Land Registry Official Copy of the Register of Title to the Land and Title Plan. These must be dated within the last 3 months. Please note that if you are supplying a Schedule of Leases you will need to ensure that copies of the Register of Title to the Land and Title Plan are supplied for each lease. Please ensure that this information corresponds with the ownership certificates on the application form before submitting the application.

A Search of Index Map (SIM) for application sites that have complex titles e.g. leaseholds, more than one freehold title, if it is unclear whether the red line goes over any other land etc. This provides a detailed list of all titles included in the red line site plan and therefore all titles that will need to be included in the section 106 agreement. The SIM search needs to be conducted against the red line plan and not the title plan. This can be done at the land registry online www.gov.uk/get-information-about-property-and-land/search-the-index-map for a small charge (which includes up to 5 titles). We will accept proof that you have requested the SIM search from the land registry (a copy of the application that you have made to the land registry) and allow the results of the search to be submitted to us within the next 14 days.

If the land required for the proposal is not registered with the Land Registry the onus is on the applicant to prove ownership/title and a Certificate of Title from a Solicitor will be required instead of Land Registry documents. We would accept a solicitor's letter of undertaking on their letterhead in the form of a one page document, headed Certificate of Title, signed by the solicitor stating their qualifications and dated.

On the Certificate, it must show:

- who owns the property
- whether there are any leaseholders, and
- confirmation of any legal charges and mortgagees on the land.

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Policy map specific requirements

To understand whether your proposal falls within the below zones, please use the mapping - [Aurora](#)

Energy and Resource Statement (Poole residential and commercial developments)

For applications that fall to be considered under the Poole Local Plan all proposals for the creation of new dwellings or 1000m² of non-commercial floor space.

Elsewhere if the proposal is for 10 or more dwellings or 1000m² of non-residential floor area.

This document should demonstrate how the proposal complies with the requirements of Policy PP37 of the Poole Local Plan, and notably, set out how the proposals would incorporate a proportion of future energy use from renewable energy sources. This proportion is a;

- Minimum of 10% for proposals of 1-10 homes (net) or under 1,000 sq. m (net) commercial floor space; and
- a minimum of 20% for proposals of 11 or more homes or over 1,000 sq. m commercial floor space.

Such renewable energy source, if constituting development, must be included on the plans.

A BREEAM pre-assessment should accompany the Energy and Resource Statement for **non-residential schemes**. This is not required for residential schemes.

Nutrient Neutrality Catchment Area (Phosphates and Nitrates)

Development located within the catchment of the [River Avon or the Poole Harbour catchment](#) and proposes additional overnight accommodation will need to mitigate the impact of such development.

Under Habitats Regulations, before giving permission, the Council must be satisfied that proposed development will not adversely affect the integrity of the habitats site because of in a net increase in nitrogen and/or phosphorus entering catchment areas. This includes planning applications at the reserved matters approval stage of the planning application process, technical details consent and discharge of pre commencement conditions. Natural England have defined catchment areas in the area around the following internationally designated habitats.

The types of additional development which may result in additional nitrogen and/or phosphorus and a decline in condition are all types of overnight accommodation which includes:

- a net gain in residential units;
- residential institutions, including student accommodation, boarding schools residential colleges and training centres;
- tourism accommodation including overnight tourist accommodation, including self-service and serviced tourist accommodation such as hotels, guest houses, bed and breakfasts, self-catering accommodation including holiday chalets and static caravan sites, caravan and touring holiday accommodation, camping/glamping sites, yurts, shepherd's hut, and 'pop' up or temporary camp sites;
- specialist housing e.g. care homes and retirement homes;
- commercial or industrial developments that include overnight accommodation;
- employment sites where employees will be hosted from outside of the catchment, and/or the development includes overnight accommodation.

Other types of business or commercial development, not involving overnight accommodation, will generally not need to be included in the assessment unless they have other (non-sewerage) water quality implications. Whilst nutrient neutrality is only currently being applied to development that would result in a net increase in population served by a wastewater system, the Habitats Regulations requirements will apply to any plans or projects, including agricultural or industrial plans and projects that have the potential to release additional nitrogen and/or phosphorus into the system.

Further information regarding mitigation, including how to purchase credits, within the [Poole Harbour catchment](#) and [River Avon Catchment](#) are available on the Council's website.

Requirements of the Nutrient Neutrality Statement

The Nutrient Neutrality Statement should include;

- details of arrangements for managing wastewater and surface water arising from the development;
- a nutrient budget calculation for nitrogen made using the Natural England nutrient calculator for Poole Harbour ([the latest calculator is currently May 2024](#)); and
- details (including how this mitigation will be delivered and secured in perpetuity) of the mitigation proposed to offset nutrient loading.

The Nutrient budget calculator

Developers must use nutrient budget calculations to show that their proposals will not bring about a net increase in nutrient pollution to specific habitats sites. Some

local planning authorities also have their own nutrient neutrality calculators which can be used.

The nutrient neutrality calculators are for:

- developers who need to complete a nutrient budget calculation to support a planning application
- local planning authorities who need to understand the mitigation requirements for future development or to assess planning applications

Details of how to complete the calculators and the calculators themselves, can be found online, via the below links;

- [River Avon SAC](#)
- [Poole Harbour](#)

Flood Risk Assessment (FRA)

When required

If the site is in the;

- Environment Agency's Flood Zone 1 and over 1 ha, or in Flood Zones 2 or 3 and/or
- Located within the future flood risk zones (LINK).

Details of what is required within a flood risk assessment are provided [here](#)

Any FRA should clearly demonstrate mitigation measures and link to drainage strategy where appropriate.

Flooding Sequential Test

The Sequential Test is required for all sites in Flood Zones 2 & 3, except where:

- is a householder development like residential extensions, conservatories or loft conversions
- is a small non-domestic extensions with a footprint of less than 250 square metres
- is a change of use (except changes of use to a caravan, camping or chalet site, or to a mobile home or park home site)
- is laid out so that only elements such as public open space, biodiversity and amenity areas are located in areas at risk of any source of current or future flooding
- is solely at risk from surface water flooding and a site-specific FRA demonstrates it will be safe throughout its lifetime, without increasing flood risk elsewhere – this exemption does not apply to sources of flooding other than surface water
- is a development on a site allocated in the development plan through the sequential test, and:
 - the proposal is consistent with site's allocated use; and

- there have been no significant changes to the known level of flood risk to the site, now or in the future, which would have affected the outcome of the test

Sequential Tests for Main Town Centre Uses

Local planning authorities should apply a sequential test to planning applications for main town centre uses which are located outside of an existing centre. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.

Main town centre uses comprise - Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

Main Town Centre use impact assessment

If the proposal is for a main town centre use outside of the Town Centre use over 2,500m² of gross floorspace, an Impact assessment is required. This should include assessment of:

- (a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- (b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

Main Town Centre uses comprise: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

Heritage Statement

For any proposal affecting a listed building, conservation area, registered park and garden, locally listed building, scheduled monument or archaeological site, Historic

park and gardens, regardless of the type of application (i.e. householder, advertisement, outline, full planning)

Tree Survey/ Arboricultural Impact Assessment/ Method Statement

If any tree is within falling distance of any proposed work; if there is a Tree Preservation Order (TPO); or the application site is within a Conservation Area. An Arboricultural Method Statement (AMS) that follows the guidance set out in sections 6 and 7 of BS5837:2012 Trees in relation to design, demolition and construction – Recommendations is required.

The Arboricultural Method Statement will include all measures considered necessary at the application stage to ensure that trees to be retained are fully protected from demolition (if applicable) to completion of development, including landscaping. This

Coastal Vulnerability Zone (CVZ), Coastal Change Management Area, Cliff and Chine Stability Consultation Zone

Proposals within these above zones must be supported with a Coastal Vulnerability Assessment. This comprises and form (see [Section 5.4 & Appendix A](#) -) which must be completed and signed.

If a proposed development is also within a flood risk area, then a Flood Risk Assessment (FRA) will also need to be completed alongside a CVA (**see Section 4.4**)

The purpose of a CVA is to enable a risk-based approach to be taken to development within the coastal zone, and will ensure that the applicant has considered the relevant planning policies in relation to flood and coastal change risks as set-out in the BCP Local Plan and expanded upon in this document, such that the applicant:

- Is aware of and understands the relevant policies and management approach associated with the coastal risks in relation to the proposed development site.
- Demonstrates that the proposed development (including any new and/or servicing infrastructure) will not increase the risk of coastal change elsewhere, for example by increasing surface water run-off and groundwater levels that can lead to cliff instability.
- Demonstrates that the development (including any new and/or servicing infrastructure) will not conflict with the future coastal risk management approach of the wider area and/or adjacent sections of coast.
- Has considered how the development (including any new and/or servicing infrastructure) will be managed at the end of its lifetime*, including measures for the removal or relocation of the development before the site is threatened by coastal change.

- That decisions on investment in the development are made with a full understanding of the risks and uncertainties

Further information can be found within the [Flooding and Coastal Change Background paper](#)

Other documents that may be requested during determination of the application

Aerodrome Safeguarding Assessment

If the proposal will exceed the various height limitations within the aerodrome safeguarding zones; has potential to increase the bird hazard risk; lighting that has the potential to distract pilots, buildings, structures, erections of works which would infringe protected surface, obscure runway approach lights or have the potential to impair the performance or airport navigation aids, radio aids or telecommunication systems. The assessment should include: • details regarding the elevation of the site to an accuracy of 0.25 metres AOD (Above Ordnance Survey Datum); • landscaping details to enable assessment of likely bird attraction; and • materials proposed for assessment of potential radar reflection. Further information:

www.gov.uk/government/publications/safeguarding-aerodromes-technicalsites-and-military-explosives-storage-area

Air Quality Assessment

If the proposal is likely to generate high levels of air pollution or is inside or adjacent to an Air Quality Management Area (AQMA).

Badger, Bat or Barn Owl Survey

If the proposed development includes the following: Does the application include any building, or structure in any locality: • with an existing Dorset Environmental Records Centre (DERC) badger, bat roost, or barn owl record? • where the presence of either badgers, roosting bats or barn owls have been reported on site by the applicant, or a third party? Bat and Barn Owl Surveys are also required where the development includes the following: Any building, or structure over 5 years old: • with an enclosed roof space, or cellar, or similar feature, or agricultural barn in a rural, or village, locality. Or any building, or structure over 5 years old: • with an enclosed roof space, or cellar, or similar feature in a town, or urban locality, that is located immediately adjacent to protected wildlife sites (e.g. SSSI, SNCI), woodlands, parks, watercourses, railway embankments, large areas of rough grassland / scrub,

agricultural fields, large cemetery, golf course, or similar areas of green infrastructure. Where the application includes either the:

- Demolition of any building, or structure with an enclosed unconverted roof space, or cellar, or similar structure. Conversion of an attic space or barn / outbuildings (includes dormer window installation), or conversion of cellar.
- Extensions that tie into an existing enclosed roof space.
- Renovation of derelict building (structures with intact roofs, or cellars).

Cycle Store details

Where the proposal includes cycle stores drawings showing the location, floor layout and elevations of the proposed cycle storage must be submitted, and details of materials to be used in the construction included on the application form. Cycle stores should be designed and sited to minimise their impact and either incorporated internally as part of the building or sited behind the building line.

Drainage/SUDS

If the proposal is for a new building, to increase the footprint of an existing building and/or the development of car parking and/or any other hard standing/impermeable surface. The information submitted should include:

- Details of the sustainable urban drainage system, for example, the soakaway system to be used and the draining points and channels to be shown on the application plans/drawings
- A statement giving details of the proposed provision for maintenance

Please note that any soakaway system will need to be at least 5 metres away from the building. Where development is within 200m of the cliffs proposals should be discussed with Wessex Water before making the application as soakaways will not be suitable and details of a drainage system will need to be submitted with any planning application. Soakaways are specifically banned along the cliff top because they put all the rain water that was previously evenly distributed across the site, into the ground at a point but that does not necessarily mean that other forms of SUDS will be acceptable. If the proposal is for new buildings, and/or to increase the footprint of an existing building, and/or the development of car parking and/or any other hard standing/impermeable surface, details of drainage systems should be indicated on any plans and drawings.

Geotechnical report

Details of what is expected to be included within a Geotechnical Appraisal Report can be found on page 65 (Annex A1) of [TCC9 FCERM Background Paper June 2024](#)

Lighting Assessment

For major developments; or schemes involving the provision of floodlighting; or where the lighting from the proposal would result in a material impact.

Minerals Assessment

Where prior abstraction is required.

Noise Impact Assessment

Where the development would raise issues of disturbance by noise to the occupants of nearby residential buildings, and for developments that are noise sensitive

Planning Statement

A planning statement can provide an overview and explanation of a proposal. It can include an assessment of how the proposed development accords with relevant national, local and Neighbourhood Plan planning policies.

Retail Impact Assessment

If the development proposal could harm the vitality and viability of existing shopping centres e.g. town centres

Refuse disposal and details of Bin Stores

here bin stores are required, details of the location, elevations and materials to be used in the construction of a bin store suitable for housing wheeled or euro bins shall be submitted as part of the application. Bin stores should be designed and sited to minimise their impact and wherever possible be incorporated internally as part of the building or sited behind the building line.

Tourism Viability Report

Where development relates to the loss of tourist accommodation, or the loss or change of use of a tourist or cultural facility. For the loss of a site or premises used, or last used, as tourist accommodation the report will need to include evidence to demonstrate that the:

- business is no longer viable and has no reasonable prospect of continuing; and the
- loss of the tourist accommodation will not harm the function of the area in relation to the tourism industry and the local community. For the loss of a site or premises used or last used, as a tourist or cultural facility the report will need to include evidence to demonstrate that:
- the current use is no longer viable;
- there is no reasonable prospect of the use continuing; and
- It has been actively marketed with a guide price reflecting its market value for a period of 12 months. For the change of use of a site or premises used or

last used, as a tourist or cultural facility the report will need to explain how the new use will maintain:

- the function of the area in relation to the tourism industry and the local community; and
- the character and appearance of the area

In addition, policies in the [Sandbanks Peninsula NP](#) (*Sand10: Existing hotels*) requires additional information where services within a hotel are lost

Transport Statement and assessments

When required

Transport Assessments and Statements are all ways of assessing and mitigating the negative transport impacts of development in order to promote sustainable development. They are required for all developments which generate significant amounts of movements.

What is required

Transport Statements should accord with the requirements set out by the PPG. [Travel Plans, Transport Assessments and Statements - GOV.UK](#)

Transport Assessments are thorough assessments of the transport implications of development, and Transport Statements are a 'lighter-touch' evaluation to be used where this would be more proportionate to the potential impact of the development (ie in the case of developments with anticipated limited transport impacts).

Transport Assessments and Transport Statements primarily focus on evaluating the potential transport impacts of a development proposal. (They may consider those impacts net of any reductions likely to arise from the implementation of a Travel Plan, though producing a Travel Plan is not always required.) The Transport Assessment or Transport Statement may propose mitigation measures where these are necessary to avoid unacceptable or "severe" impacts. Travel Plans can play an effective role in taking forward those mitigation measures which relate to on-going occupation and operation of the development.

Transport Assessments and Statements can be used to establish whether the residual transport impacts of a proposed development are likely to be "severe", which may be a reason for refusal, in accordance with the National Planning Policy Framework.

Such statements should accord with ATE Guidance - [Active Travel England Standing Advice Note: Active travel and sustainable development](#)

Travel Plan

When are they required

Travel Plans are all ways of assessing and mitigating the negative transport impacts of development in order to promote sustainable development. They are required for all developments which generate significant amounts of movements.

What do they need to include?

The primary purpose of a Travel Plan is to identify opportunities for the effective promotion and delivery of sustainable transport initiatives eg walking, cycling, public transport and tele-commuting, in connection with both proposed and existing developments and through this to thereby reduce the demand for travel by less sustainable modes. As noted above, though, they should not be used as way of unfairly penalising drivers.

Travel Plan

For development that may have significant impacts on the transport network. The Travel Plan should outline the way in which the transport implications of the development are going to be managed in order to ensure the minimum environmental, social and economic impacts. Further advice is available in the Communities and Local Government publication 'Good Practice Guidelines: Delivering Travel Plans through the Planning Process 2009'.

Ventilation/ Extraction Statement

Where the development is likely to require ventilation or extraction full details of the position and design of ventilation and extraction equipment should accompany the application and be included on plans/drawings. Where the equipment is included on the application drawings, enclosing a copy of the manufacturer's specification with the application will usually provide sufficient technical detail. All applications for hot-food take-aways, bars/pubs, restaurant uses and launderettes etc. will need to include this information. Details will also be required for retail, business, industrial, leisure or other developments where substantial ventilation/extraction equipment is proposed to be installed.

APPENDIX 1: Matrix

(inserted as a A3 PDF)

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Appendix 2: Validation Check List in List Form

Householder

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50 OR dimensioned)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Parking plan (if changes in parking arrangements) (1:100 or 1:50 OR dimensioned)
- Roof plans (existing and proposed) (1:100 or 1:50 OR dimensioned))
- Correct Fee

If within relevant Mapped Zone;

- Flood Risk Assessment (proportionate to the scale of the development) if located within Flood Zone 2, 3 and/or future flood risk zones
- Heritage Statement (proportionate to the scale of the development) if adjacent to Conservation Area or Listed Building.
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / if the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Householder and Listed Building Consent

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50 OR dimensioned)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Parking plan (if changes in parking arrangements) (1:100 or 1:50 OR dimensioned)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Heritage Statement

If within relevant Mapped Zone;

- Heritage Statement (proportionate to the scale of the development) if adjacent to Conservation Area or Listed Building.
- Flood Risk Assessment (proportionate to the scale of the development) if located within Flood Zone 2, 3 and/or future flood risk zones
- Heritage Statement if adjacent to Conservation Area or Listed Building.

- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / if the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Application for Planning Permission

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Application for Planning and Listed Building Consent.

- Application form

- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Heritage Statement
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Application for Listed Building Consent.

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and sections (existing and proposed) (1:100 or 1:50) (if excavation e.g. pools are proposed)

- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Heritage Statement

Application for Planning Permission and consent to display an advertisement

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents

- agreement to pay legal fees

Application to display an advert

- Application form
- Ownership Certificates
- Location Plan/ Block Plan
- Site Plan
- Existing and proposed elevations and floor plans
- Car parking plan (existing and proposed) (if proposal would be located within the parking area or access).
- Other plans and drawings// photographs to support application
- Heritage Statement if within a Conservation Area or within setting of a Listed Building.
- Correct fee

Outline Planning Permission

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement

- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Certificate of Lawful Development (Proposed)

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

Certificate of Lawful Development (Existing)

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

Approval of details reserved by condition

- Application form
- Ownership Certificates
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

S.73 – removal or variation of condition following grant of planning permission.

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee

- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- If the changing change approved Biodiversity Gain;
 - Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

Non-material amendment

- Application form
- Ownership Certificates
- Other plans, documents, and drawings/ photographs to support the varied condition.
- Payment of correct fee

Prior Approval Applications

See individual application forms and the relevant Class in the Town and Country Planning (General Permitted Development) (England) Order 2015 (as amended) for the requirements to be submitted within each specific prior notification.

Minerals and Waste applications

Please see national Guidance.

Proposals accompanied by an Environmental Statement

Validation requirements are bespoke for these developments.

Forms

Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements

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Appendix A Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements

1. Applicant's name:

.....

2. Agent's name (if applicable):

.....

3. Development proposal title:

.....

4. Development location / address:

.....

5. Pre-application details (if applicable):

.....

6. Which Shoreline Management Plan policy unit(s) cover the development frontage?

.....

7. Which FCERM Strategy covers the development frontage?

Poole Bay, Poole Harbour & Wareham FCERM Strategy	Yes / No
Christchurch Bay & Harbour FCERM Strategy	Yes / No

8. Which FCERM Strategy unit(s) cover the development frontage?

.....

9. Which BCP Sea Cliff and Chine Asset Unit(s) does the development cover?

.....

10. Which risk zone(s) does the development sit within (select "Yes" for all that apply):

Coastal Change Management Area (CCMA)	Yes / No
Coastal Vulnerability Zone (CVZ)	Yes / No
Cliff and Chine Stability Consultation Zone	Yes / No
Flood Zone <i>(if yes, please also complete a separate Flood Risk Assessment)</i>	Yes / No

11. Development category (select "Yes" for all that apply if mixed development):

New residential development	Yes / No
New non-residential development	Yes / No
Extension to existing development	Yes / No
Modification to existing development	Yes / No
Temporary buildings, caravans and land uses	Yes / No
Temporary beach pop-up or similar short term seafront installations <i>(If yes, please also refer to the BCP FCERM Guidance for Beach Pop-Ups and other Temporary Seafront Installations – Appendix B of the "Flooding & Coastal Change in BCP" document)</i>	Yes / No
Infrastructure	Yes / No
Other (please state):	Yes / No

Please provide detailed answers (with supporting evidence as appropriate) to the following:

12. What is the nature and the scale of the proposed development?

.....

13. What impact will the location of the development have for other properties in the adjacent area?

.....

14. Provide details of the predicted shoreline and/or cliff top position in relation to the proposed development. Is the proposed development expected to be lost to the sea, and if so, when?

.....

15. Provide details of measures required to protect the proposed development from loss during its design life. How will the development be safe through its planned lifetime, without increasing the risk to life or property, or requiring new or improved coastal risk management structures or cliff slope stabilisation measures?

.....

16. Provide details of measures required to provide safe access and egress for the site and its users over its planned lifetime?

.....

17. How will the development enhance the ability of communities and the natural environment to adapt sustainably to the impacts of a changing climate?

.....

18. Demonstrate that the development will not affect the stability of the coast or exacerbate the rate of shoreline change.

.....

19. Demonstrate that the development will not cause cliff destabilisation caused by the presence of groundwater in or close to the cliff face due to land drainage and run-off issues. *Please provide a Geotechnical Appraisal Report appended to this Coastal Vulnerability Assessment that follow the requirements provided in **Annex A1**.*

.....

20. Set out details for how the development will be managed at the end of its planned lifetime.

.....

21. Where appropriate, provide evidence of wider sustainability benefits that outweigh the impact of coastal change.

.....

22. Any other relevant information.

.....

23. Declaration:

I understand that the information contained in the Shoreline Management Plan and relevant FCERM Strategy is subject to change and contains the following uncertainties

- Future coastal change / erosion risk trends are not predicted with certainty and future shoreline positions are shown as indicative bands of risk at a range of future intervals. These assessments will change over time as more evidence is captured and analysed.
- Where future policies or strategic approaches are based upon the provision and maintenance of coastal risk management structures to resist coastal change, it is not possible to guarantee that funding will be available to deliver this objective.
- It is possible that where the provision and maintenance of coastal risk management structures is required to sustain a development over its planned lifetime, then a contribution toward the cost of structure management may be

sought from the beneficiaries (including owners/occupiers of properties protected by the structures).

- Policies and strategic approaches to implement them are reviewed and updated at regular intervals, and may be changed to something less favourable than indicated at present.

I confirm that the development proposal is made with a full understanding and acceptance of the risks associated with coastal change contained in the relevant parts of the Shoreline Management Plan, relevant FCERM Strategy(ies) and also the uncertainties listed above.

24. Signed by the applicant:

.....

25. Printed name:

.....

26. Date:

.....

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Annex A1 Geotechnical Appraisal Report Requirements

A.1 Approaches to the investigation of coastal land instability

Ground investigations are undertaken to determine site specific geology, geomorphological processes and the geotechnics of erosion or instability problems in an area.

The approach to geotechnical investigations can vary, and there is a range of national standards, technical documents and general literature that provide guidance for the geotechnical investigation of instability problems in the UK. However, Chapter 4 of the *Cliff Instability and Erosion Management in Great Britain: A Good Practice Guide* (Halcrow, 2011) provides a concise overview of the most appropriate approaches for investigating coastal land instability, including the use of early warning and monitoring systems and the value of ground stability (a.k.a. geotechnical appraisal) reports in ensuring that appropriate expert assessment and evaluation of land stability has been considered in producing development proposals (refer to Section A.2).

A.2 Suggested structure and content of Geotechnical Appraisal Reports

Geotechnical Appraisal Reports prepared to support a planning application are recommended to broadly adhere to the following structure (adapted from Halcrow, 2011):

- 1) **Introduction:** a statement indicating for whom the work was done, the nature and scope of the investigation, its general location, its purpose and the period over which it was carried out.
- 2) **Description of History:** a detailed description of the site based on observations made by a Competent Person (i.e. a chartered geomorphologist, geologist or engineer with experience of coastal cliffs and landslides) during a site reconnaissance. It should be referenced to a plan of the site showing national grid co-ordinates and to a scale no smaller than 1:2,500. Use of GIS is recommended to manage spatial data.
- 3) **Investigations:** information consulted during the course of the desk study should be referred to and listed as an appendix. Fieldwork should be described and full records of boreholes, trial pits or other exploratory methods included as an appendix and their locations shown on a plan. Site tests and laboratory tests and methods should be similarly described and their results included.
- 4) **Ground Conditions:** descriptions of the ground conditions found during the investigation and an interpretation of their relevance to the stability of the site and surrounding area. Anomalies in any of the data collected should be pointed out. The following items should be discussed, where appropriate: geological conditions, hydrogeology, history of past events and ground movement rates, soil and rock properties, other factors (e.g. coast protection).
- 5) **Evaluation of Stability:** the global stability of the site and relevant adjacent area should be evaluated with respect to the proposed development and the assessment of ground conditions. Where global stability calculations are carried out, the method of analysis shall be stated. The global stability calculations must demonstrate both the existing factors of safety and, where appropriate, the factors of safety that would be created by the proposed development and any associated stabilisation measures.

Where structures or services are present and adjacent to the proposed site/works and there is potential for the temporary or permanent works to induce deformation,

displacement or settlement, a detailed assessment is to be undertaken to demonstrate that deformations, displacements, or the induced settlements generated are within tolerable limits for both the temporary and permanent condition.

It is expected that particular attention should be paid to the gradients of cut slopes and fills, applied loads (for both the temporary and permanent state), drainage measures, retaining structures/lateral support measures, failure mechanisms and the design criteria applied must comply with the appropriate codes of practice, standards, Eurocodes and national annexes.

- 6) **Conclusions and Recommendations:** the Competent Person should summarise the main conclusions of the investigation and list the recommendations to ensure both the long-term stability of the site (taking account of the anticipated life of the development) and also in the short term whilst construction proceeds (i.e. ensure the stability of the temporary works). It is expected that particular reference will be made to matters such as: the avoidance of material storage/imposed loads near the crest of steep slopes, restrictions on the depth of excavation at the toe of steep slopes, the maximum length of trenches excavated along the contours of steep slopes at any one time, avoidance of septic tanks and soakaways, provision of flexible jointed pipes capable of sustaining small movements without leakage, provision for free drainage of groundwater, minimising drainage diversions and their lining where site conditions require them.

A.3 Geotechnical Appraisal Report Declaration Form

Alongside the Geotechnical Appraisal Report, the following declaration form should also be submitted (adapted from Halcrow, 2011):

Site Name	?	
Site Address	?	
Category	Question	Answer Yes / No / Uncertain / n/a
A) Competent Person	Has a Competent Person or Geotechnical Specialist prepared the report?	
	Does the Competent Person or Geotechnical Specialist operate a Quality System which meets the requirements of BS EN ISO9001?	
	Does the Competent Person or Geotechnical Specialist have a minimum of £1m Professional Indemnity Insurance?	
B) Site History	Has the site been affected by past ground instability?	
	Is the site located within or adjacent to any instability features?	
C) Site Inspection	Has a detailed site inspection been carried out?	

	Does the site and adjacent land bear any geomorphological evidence of past or incipient ground instability?	
	Does the site or neighbouring property bear any evidence of structural damage or repairs that might be associated with ground instability?	
D) Geotechnical Desk Study	Have any previous ground investigation reports and/or borehole records from the site been consulted?	
	Is the information consulted and referred to sufficient to quantify the ground behaviour constraints, which could affect the stability of the site?	
E) Ground Investigation	Has a ground investigation been carried out and have the results been submitted in support of this application?	
	Did the investigation identify the presence of sub-surface shear zones and low strength compressible soils at the site?	
	Is the information sufficient to quantify the ground behaviour constraints, which could affect the stability of the site?	
F) Stability Assessment	Is the information in B, C, D and E (where applicable) adequate to assess the stability of the site and adjacent land?	
	Can ground instability reasonably be foreseen within or adjacent to the site within the design life of the proposed development, allowing for any deterioration of ground conditions caused by the development itself?	
	Can instability be reduced to a reasonable level through cost-effective mitigation and stabilisation measures that would be environmentally acceptable?	
G) Mitigation Measures	Have mitigation measures been proposed with respect to ground instability issues?	
	Have these been designed to reduce the effects of actual or potential instability to tolerable/allowable limits?	
	Is it possible the mitigation measures may have an adverse effect on the stability of other, adjacent sites (for example by affecting groundwater drainage in the area)?	

H) Name, Qualifications and Signature of Person Responsible for the Geotechnical Appraisal Report	Full Name: Qualifications: Signature: Company Represented (if applicable):
--	---

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BNG checklist: Self-Build Proforma

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BNG Checklist

1. Are you applying for an exemption from BNG?
 - Yes ☐
 - No ☐ If selected, go to question 4;
2. If yes, please select your exemption;
 - De-minimis ☐ If selected, go to question 3
 - Self-Build ☐ If selected, please fill out the [self-build proforma](#)
3. If you have selected de-minimis, please provide;
 - **A Biodiversity Net Gain Statement** to include;
 - dated aerial photographs and
 - dated photographs of all parts of the site and,
 - a written explanation of why the applicant considers the exemption to apply.
4. If no exemption is applicable, the below must be provided;
 - **Up to date Statutory Biodiversity Metric** completed by a competent person, to include all existing habitats at baseline, those existing habitats to be retained or enhanced and any new habitats to be created. A Small Sites Metric may be provided in accordance with these details - .
 - **Completed Condition Assessment forms** for each existing habitat that has been assigned a 'condition' within the metric (applicable when using the Statutory Biodiversity Metric);
 - A **Biodiversity Net Gain Statement** to include:
 - dated aerial photograph/s;
 - dated photographs showing all parts of the site and each habitat parcel within the site;
 - a description of each habitat parcel;
 - steps taken to minimise the adverse effect of the development on the onsite habitat and other habitat within adjoining or nearby sites;
 - details of how the biodiversity gain hierarchy has been applied in the design of the development to maximise the retention and enhancement of existing habitat and creation of new habitat onsite. Please see here for further details of what is expected to this part of the assessment [LINK](#) .

- details of how the proposed habitat relates to and helps provide connections to habitat within surrounding sites.
- **Habitat plans** – Clearly defining the individual habitat parcels. Habitat plans for both baseline (existing) habitat and post development onsite habitat should be provided;
- Where any ‘significant’ biodiversity gains are proposed, **a draft Habitat Management and Monitoring Plan (HMMP)**. This will be likely be required where habitats such as trees and other habitats of medium or higher distinctiveness are proposed. The Defra [Habitat Management and Monitoring Plan Template - JP058](#) should be used. This will set out full details of how the habitat will be managed and maintained for a minimum of 30 years and will enable agreement on the monitoring frequency for proposed habitats. It will also include full details of who will be responsible for the management and maintenance of the habitat, and for reporting to the council on the success of the habitat.
- Where there are no significant biodiversity gains and for all other ecological enhancements, **a draft Landscape and Ecological Management Plan** will be required.

The Biodiversity Metrics, User Guides and Condition Assessments can be accessed here: [Statutory biodiversity metric tools and guides - GOV.UK](#)

*The Small Site Metric User guide sets out the circumstances when the small site metric can or cannot be used.

Please also see BCP’s BNG Guidance [LINK](#)

Self-build/Custom house building BNG exemption proforma



This form should be completed and submitted with an application where an exemption from mandatory Biodiversity Net Gain is claimed due to the proposed development being for self-build or custom build housing.

Applications claiming self-build exemptions need to be supported with the following information:

- Completed pro-forma to confirm the applicant agrees that the development meets the definitions of self-build and custom housebuilding as set out in the Act;
- Land registry documents (title and deed) dated within the last 3 months

It is also highly recommended that the baseline habitat value is also submitted along with photographs demonstrating the habitats onsite.

These proposals will be subject to a legal agreement that will secure the use of the dwelling as self-build as defined in the Act for a period of 3 years following decision. This will show in conveyancing searches.

Please note that if the dwelling does not meet the self-build definition at any point within these three years following decision, then the applicant will become liable for fulfilling the statutory biodiversity gain condition.

If this occurs, the occupier will be responsible for supplying the following information and paying the relevant fee to discharge the condition:

- A Biodiversity Metric with the baseline score calculated;
- Dated photographs of baseline habitats and a dated aerial photograph of the site if possible;
- A redline plan;
- Land registry title and deeds dated within the last 3 months; and
- A baseline habitat and post development habitat plan.

Please note that the suite of BNG information can be expensive. Further, the Town and Country Planning Act 1990 Schedule 7a, part 1, 6B states that if there is insufficient evidence of the baseline value from before the carrying out of the proposal, then the baseline value needs to include the highest biodiversity value that can reasonably be supported by the available evidence relating to the onsite habitat. As a 10% uplift from the baseline is required, this could mean that more units need to be purchased than if the baseline values are known and agreed with the LPA hence why it is encouraged that baseline habitat values are submitted with a planning application claiming this exemption.

Please complete sections 1-5 below.

1. Regulation 8 of the Biodiversity Gain Requirements (Exemptions) Regulations 2024 states that the following in relation to self-build and custom build applications.

8.-(1) The biodiversity gain planning condition does not apply in relation to planning permission for development which—

- consists of no more than 9 dwellings;
 - is on a site that has an area no larger than 0.5 hectares; and
 - consists exclusively of dwellings that are self-build or custom housebuilding as defined in [section 1\(A1\) of the Self-build and Custom Housebuilding Act 2015](#) (“the 2015 Act”)

2. In the 2015 Act “self-build and custom housebuilding” is defined as meaning the building or completion by—

(a) individuals,

(a) associations of individuals, or

(b) persons working with or for individuals or associations of individuals,

of houses to be occupied as homes by those individuals.

However, it does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person.

3. The Government has also produced [Self-build and custom housebuilding guidance](#). Information within it may provide assistance in interpreting the 2015 Act and in that respect, in considering whether the self-build and custom housebuilding exemption from mandatory Biodiversity Net Gain is relevant to a particular proposal. For example, the guidance identifies the following:

- Self-build custom housebuilding covers a wide spectrum, from projects where individuals are involved in building or managing the construction of their home from beginning to end, to projects where individuals commission their home, making key design and layout decisions, but the home is built ready for occupation (‘turnkey’).
- In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout.
- Off-plan housing, homes purchased at the plan stage prior to construction and without input into the design and layout from the buyer, are not considered to meet the definition of self-build and custom housing.

4. Application details

Site address	Click or tap here to enter text.
--------------	----------------------------------

Name of applicant	Click or tap here to enter text.
Email address	Click or tap here to enter text.
Phone number	Click or tap here to enter text.
Description of development	Click or tap here to enter text.

5. Please complete to confirm agreement of the following (please use 'fill and sign' to mark with a tick or cross).

- ☐ I confirm that the proposed development meets the definitions as set out within Regulation 8 of the Biodiversity Gain (Exemptions) Regulations 2024 and Section 1(A) of the Self-build and Custom Housebuilding Act 2015.
- ☐ I have submitted evidence in support of the planning application to demonstrate how the development meets the self-build/ custom build definitions and to enable the application to be validated.
- ☐ I confirm that I understand that the description of development may need to be worded/amended to reflect and include reference to the fact that the proposal relates to self-build or custom housebuilding

Signature and date

Signed Click or tap here to enter text.

Date: Click or tap here to enter text.

Please note: whilst self-build and custom build housing development may be exempt from the requirements of the statutory biodiversity gain condition requiring a 10% net gain in biodiversity, these applications will still be expected to demonstrate how they will achieve a measurable gain in biodiversity through habitat and species enhancements including bat/bird boxes, creation of hedgehog corridors through providing small gaps in fences, bee bricks and other measures, in accordance with the paragraph 180(d) of the National Planning Policy Framework

Please note: if it later turns out that the exemption is not applicable, the statutory biodiversity gain condition would apply. Commencing development which is subject to the biodiversity gain condition without an approved Biodiversity Gain Plan could result in enforcement action for breach of planning control.

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This matrix is for Guidance only and only covers requirements at the validation stage. Site specific factors may require additional documentaiton.	Required																	Required if within Mapped Zone and meet requirement													Development type specific requirements																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																
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																																Net gain of 10 or more residential units.	10+ units PLUS arguing not viable to provide affordable housing -	If self build (for BNG) or net gain in residential units.																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																													
	Application form	Ownership Certificates	Location Plan (1:250 or 1:2500)	Site Plan / Block Plan (1:200 or 1:500)	Existing and proposed elevations and floor plans	Ground levels and section plans (existing and proposed)	When excavation (inc. basements or pools) are proposed	When a change in parking arrangements are proposed	When roof alterations are proposed	For Prior Approval and LDCs					BNG																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																

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Local Validation Checklist

DRAFT JANURARY 2025

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Introduction

To apply for Planning Permission or Consent, you will need to submit an application.

The LPA will assess whether the information submitted meets the national and local requirements. This document sets out what those national and local requirements are for the most common planning application types.

Some information is required in order for the officer to consider your proposals, but does not form part of the nationally set out validation check list. Not having such information upfront can cause delay to the determination of the planning application. The Local Validation Checklist is designed to assist you and our officers in having as much information as reasonably possible upfront that is required in order for the expedient determination of your application. Such additional information is based on local plan or other material designations

However, we are not able to pre-empt all requirements, and some are likely to be ascertained only after consultation responses have been received or after the officer has reviewed the case. Our [pre-application service](#) will help you understand what these are likely to be, but some guidance is provided within the 'information that may be required or requested' section of this report. Please note our '[customer charter](#)' that sets out the Council's approach to accepting additional or revised plans during the processing of the planning application.

This document explains what is required to help you make a better application and for you to establish what may be required upfront, in the aim for a higher quality and more expedient planning service.

Changes since the 2021 Local Validation Checklist

BCPs Local Validation Checklist has been redeveloped to make it easier to navigate and interpret, to create greater consistency and clarity in what is required for your planning application to be validated. The trade off for this is that there is likely to be an increase in requests for information during the planning application stage, where such information could only be ascertained through consultation responses and officer knowledge. However, such instances can be avoided through use of the council's pre-application or PPA services.

The validation requirements for EIA developments, in addition to those set out in the National Requirements List, are to be determined by the determining officer. It is strongly advised that Pre-application discussions (via a Planning Performance Agreement (PPA) or otherwise) have been undertaken along with a screening and scoping assessment to achieve a more expedient validation outcome.

- Removal of the separate checklist lists
- Creation of a single interactive document
- Altered website

- Altered requirements;
 - Requirement of completion of BNG statement form for full and outline planning applications
 - Requirement to complete 'Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements' for developments within the 'Cliff instability zone'.
 - Clarity over requirements for 'redline' plans
 - Explicit requirement for draft UU and payment of S106 upfront for all residential schemes, unless declaration signed acknowledging scheme refusal.
 - If Affordable housing required but argued to be non-viable, DVS fee to be paid upfront, unless signed acknowledging scheme refusal.
 - Bespoke validation requirements for EIA development, determined by the determining officer.
 - No longer accepting paper copies of planning application submissions.
 - Introduction of fees.
 - Nutrient neutrality – if within relevant catchment require submission of statement and relevant calculator

Validation Matrix

The validation matrix is a visual tool to help applicants understand what is required to determine their planning application.

The visual version is in Appendix 1, and can be downloaded here.

Pre-application Service

The local planning authority offers a chargeable pre-application advice service which applicants are encouraged to use before applying for planning permission. Details of how to make an enquiry and can be found on our website:

<https://www.bcpccouncil.gov.uk/Planning-and-building-control/Apply-for-planningpermission/Pre-application-advice/Pre-application-advice.aspx> The guidance document includes details of fees and what to submit:

<https://www.bcpccouncil.gov.uk/Planning-and-building-control/Apply-for-planningpermission/Pre-applicationadvice/Docs/pre-app-guidance-notes-final-version.pdf>

National and Local Requirements

The list below contains details of the national and Local requirements for the validation of planning applications at BCP. The National Requirements can be viewed here [Making an application - GOV.UK](#).

General requirements

Application forms and fees

Application form

This can be completed on-line using the Planning Portal
www.planningportal.co.uk/apply

PDFs can be downloaded from the Planning Portal
www.planningportal.co.uk/info/200126/applications/61/paper_forms or obtained from our Customer Contact Centre. These can be emailed to planning@bcpcouncil.gov.uk. Please note that there may be a fee for the submission of applications by email.

The Council are no longer accepting paper copies of planning applications e.g. that have been posted to the council or handed in.

Ownership and Agricultural Land Certificates

Where included on the application form ownership certificates A, B, C or D must be completed. The 'owner' is anyone with a freehold interest or a leasehold interest where the lease is 7 years or longer.

A notice to all owners must be completed and served in accordance with.

- Certificate A should only be signed where the applicant and the owner are the same individual or organisation.
- Certificate B should be completed and notice served on all owners in all instances where the applicant is not the only owner of land or does not own the site. It is not sufficient to only inform the management company. **This includes flats.**
- Certificate C should be completed if the applicant does not own all of the land to which the application relates and does not know the name and address of all of the owners and/or agricultural tenants. [Notice 1](#) must be completed and sent to all known owners and/or agricultural tenants. Where the owners or agricultural tenants are unknown, [Notice 2](#) must be published in a local newspaper.
- Certificate D should be completed if the applicant does not own all of the land to which the application relates and does not know the names and addresses of any of the owners and/or agricultural tenants. [Notice 2](#) must be published in a local newspaper. A copy of the notice should be sent with the application to the local authority.

This includes a requirement to serve notice on the husband/wife/partner if land is jointly owned but only one of them completes the application.

It also includes a requirement to serve notice where the applicant is an individual and a company owns the land (regardless of whether the applicant is the sole director) or where the applicant is a company to serve notice on all the directors of that company. If the proposed extension or building will be attached to a neighbouring property, and either the foundation, wall or roof overhails the boundary or butts up to the boundary then you will need to serve notice on the owner of the neighbouring land. This is likely to be the case if the application is for a terraced or semi-detached property. Where Certificate C or Certificate D is completed because notice cannot be served on all the owners, the local newspaper that you will need to publish a notice in within 21 days of the date of application is the Bournemouth Echo. Notice must also be served on any agricultural tenants. Applicants must certify that they have notified any agricultural tenants about their application, or that there are no agricultural tenants on the site. This certificate is required whether or not the site is an agricultural holding and is now combined with the ownership certificates on the standard application form where it applies.

Further information about ownership certificates can be found in the government's published Planning Practice Guidance (PPG): [Making an application - GOV.UK](#)

Fees

The correct fee must be paid when the application is submitted.

The Planning Portal website includes a fee calculator [Planning Portal](#)

If an application is submitted via the Planning Portal website the fee payment must be made to the Planning Portal, including their administrative fee.

Fees can only be paid directly to the local authority if the application is emailed directly to us. There may be a local fee to cover the cost of processing the application. A fee may also be applied if your application is found to be invalid, to cover the cost of seeking the required documentation. In such instances the invalidity fee must be paid before the application can be made valid. The application cannot be validated without payment of such fees.

CIL Forms

For proposals that are for CIL liable developments, a **CIL Additional Information Requirement Form** will need to be completed for any applications which are CIL liable. BCP only charges CIL for new dwellings.

[cil_questions.pdf](#)

Plans

All plans and documents must be submitted in PDF format. Photos or other formats cannot be accepted. The exception is the BNG Metrics that must be submitted as a excel document.

Location Plans

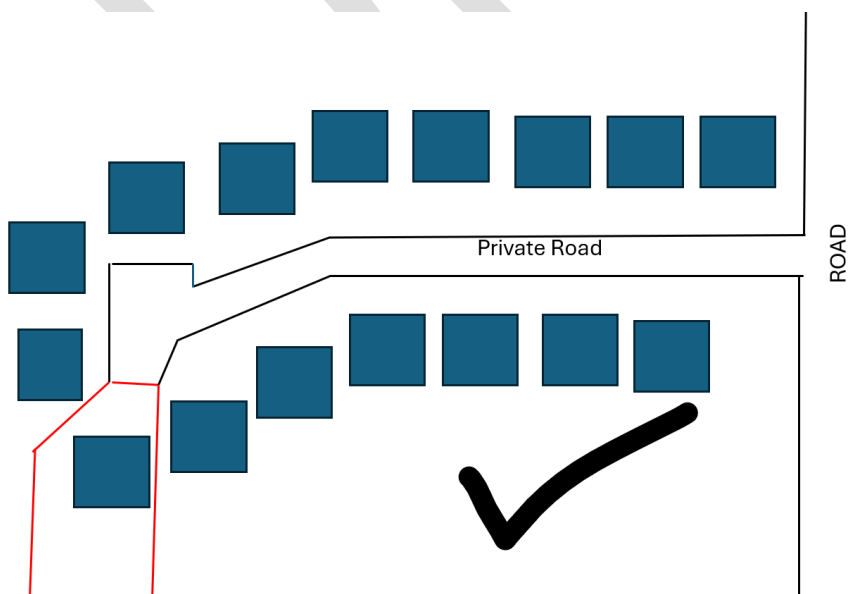
Scale: Must be of a scale of 1:1250 (scaled to fit A4 or A3 paper) with a scale bar, north pointer and showing a minimum of **two named roads and surrounding buildings**.

Redline: The application site (to which your proposal relates) should be edged clearly with continuous a red line.

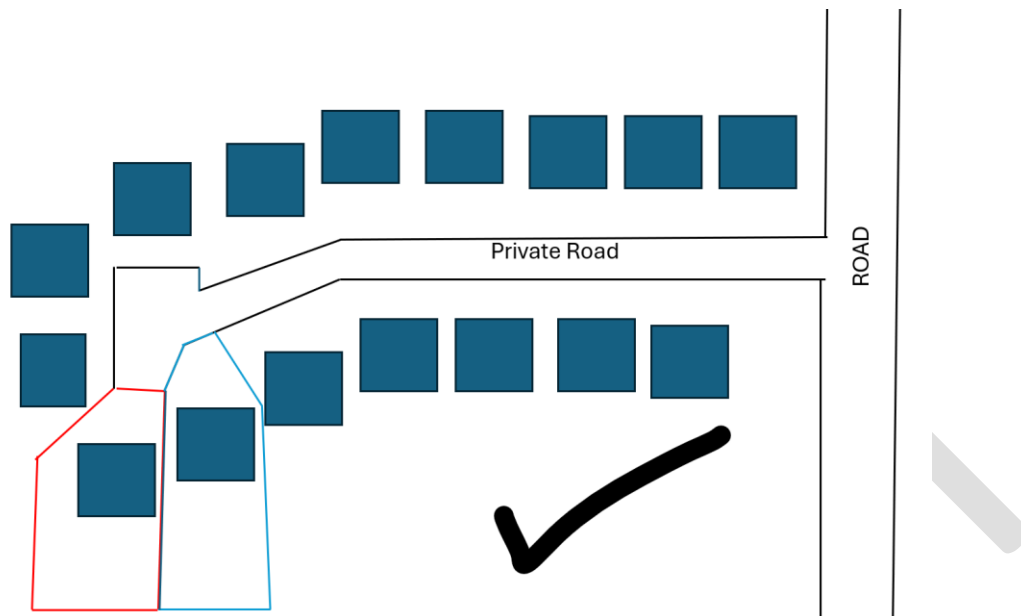
Your red line boundary should include the entire proposal site, i.e., land required for access to the site, car parking, gardens, and other outbuildings around the site, such as garages.

For all applications, whether for residential, rural, or commercial developments, it is vital to show the site's access to roads that link to the public highway and that this is included on the plan itself.

The redline can abut the pavement rather than the road, unless the development proposals require work to the pavement – e.g. a dropped curb. In those cases the redline must include the pavement to the highway.



Blue Line: A blue line should be drawn around any other land owned or controlled by the applicant, close to or adjoining the application site.



Where to purchase: Location plans can be purchased from one of the Planning Portal's accredited suppliers:

www.planningportal.co.uk/homepage/4/buy_a_planning_map

Format: All plans and documents must be submitted in PDF format.

Copyright: We will not accept plans submitted that do not comply with copyright law. For example, Land Registry plans or unlicensed Ordnance Survey maps will not be accepted as site location plans, and your application will be made invalid if such is submitted.

Block Plan/Site Plan

Scale and orientation: Must be a Scale 1:500 or 1:200 accurately showing:

- The direction of North
- The proposed development in relation to the site boundaries and other existing buildings on the site, with written dimensions to the boundaries
- An accurate and annotated scale bar

Details to include where relevant:

- All the buildings, roads and footpaths on land adjoining the site including access arrangements

- e) All public rights of way crossing or adjoining the site
- f) The position of all trees on the site, and those on adjacent land
- g) The extent and type of any hard surfacing
- h) Boundary treatment including walls or fencing where this is proposed

Purchase: Block plans can be purchased from one of the Planning Portal's accredited suppliers: www.planningportal.co.uk/homepage/4/buy_a_planning_map
Please ensure that any plans submitted comply with copyright law.

Existing and Proposed Elevations and floor plans

Required so that officers can clearly see changes.

- For all application types (excluding householder) must be scaled (1:100 or 1:50) with a scale bar

For Householders and householder related Lawful Development Certificate (LDC) applications, these can be drawn by hand but must be a reasonable likeness AND include dimensions.

Format: All plans and documents must be submitted in PDF format.

Ground levels, existing and proposed (as datum points)

Where excavation is proposed (beyond that required for foundations). These must include datum points where ground levels are shown.

Format: All plans and documents must be submitted in PDF format.

Section Plans

Provided for schemes including swimming pools. These must be dimensioned (1:50 or 1:100) with a scale bar. Where ground levels around the pool are to be changed, then a levels plan must be included.

Format: All plans and documents must be submitted in PDF format.

Existing and proposed car parking plan

Required if the proposal will alter or change the car parking and access arrangements e.g. create or alter vehicle and/or pedestrian access; widen visibility splays; add or alter parking spaces. These must be scaled (1:50 or 1:100) with a scale bar.

Format: All plans and documents must be submitted in PDF format.

Roof Plans

If any roof would be created or altered by the proposal. These must be scaled (1:50 or 1:100) with a scale bar.

Format: All plans and documents must be submitted in PDF format.

Photos

To help speed up the processing of planning applications, all householder applications shall be submitted with photos of the site and its surroundings.

For clarity, this shall include the;

- Front, sides and rear elevation of the host building.
- A photo of the frontage with both adjacent dwellings/ buildings in the shot.
- A photo of the rear elevation with both adjacent dwellings/ buildings in shot.
- Photo(s) clearly showing the rear garden in its entity.

BNG

Unless exempt, developers in England are required to provide 10% BNG on all habitats within the redline boundary of their development, whether or not they are impacted. [Separate arrangements apply to on-site irreplaceable habitat.](#)

For off-site gains and significant on-site gains, you must maintain the habitats you create or enhance for a minimum of 30 years. The responsibilities will be set out in a [legal agreement](#).

Biodiversity Net Gain Statement

Required to be completed and signed for **all** applications, with the exemption of Householder Applications, Prior Approvals, Certificate of Lawful Developments. This is to assist officers in the assessment of BNG.

link to document here - and in Appendix 2.

Format: All plans and documents must be submitted in PDF format.

Biodiversity Metric

The [statutory \(official\) biodiversity metric calculation tool](#) must be used in order to demonstrate that you have calculated the number of biodiversity units for existing habitat or habitat enhancements in accordance with the statutory biodiversity metric.

If your development has to meet [mandatory biodiversity net gain \(BNG\) requirements](#), it will need to use the metric tool.

The requirement to use the biodiversity metric will take effect at different times, depending on the size of the development. The relevant metric tool should be used for:

- major developments
- small developments

- nationally significant infrastructure projects from May 2026

You can choose to use a simpler version of the metric tool, called the [small sites metric](#) (SSM) if your development meets the criteria to do so.

Except for small developments using the SSM, a developer or land manager should hire a competent person such as an ecologist to use the metric tool and advise on the metric tool's calculations. The local planning authority (LPA) will review submitted calculations and may reject them if they do not believe they have been completed by a competent person.

An ecologist can enter information into the metric tool about the existing habitat and any planned development or enhancement. The metric will calculate the biodiversity value of the habitat, and how a development, or a change in land management, will change the biodiversity value. For example, the metric can measure the impact of building houses, planting a woodland or sowing a wildflower meadow.

Early and repeated use of the metric tool can help:

- assess a site to find the number of biodiversity units an existing habitat has – its biodiversity value
- compare BNG proposals for a site - such as [creating or enhancing habitat, on-site or off-site](#)
- plan habitat management decisions that promote biodiversity

For more information, please visit - [Calculate biodiversity value with the statutory biodiversity metric - GOV.UK](#)

Habitat Management and Monitoring Plan (HMMP)

A draft Habitat Management and Monitoring Plan should be submitted with non-BNG exempt proposals.

There's a set of [HMMP tools](#) including templates, a checklist and companion guides, to help you write your HMMP.

The HMMP template is a guide with a structure to help you show details of your project. You do not need to fill in every section as not all of it will be relevant to you. It's suitable for significant on-site enhancements and for off-site gains.

The template's companion document lists habitat condition and assessment criteria.

There is a separate template and habitat guide for [small developments](#).

For further information, please see - [Creating a habitat management and monitoring plan for BNG - GOV.UK](#)

Design and Access Statement

A Design and Access Statement is a concise report accompanying certain applications for planning permission and applications for listed building consent.

Further details of what the design and access should contain are provided [here](#)

A Design and Access Statement is required for the below applications;

- Major Planning Applications
- Applications in a Conservation Area AND
 - 1 or more dwellings
 - Building(s) with a floor space of 100sqm or more
- Applications for Listed Building Consent

DRAFT

Application type specific requirements

Residential developments

Affordable Housing Statement

When Required: Where 10 or more new or additional units of residential accommodation will be created or where 9 or less units are proposed and the site area is 0.5 hectares or more.

This form must state:

- Whether or not the scheme would provide affordable housing
- On site or as a contribution
- Mix
- Tenure

Draft S106: The Submitted UU request must also include provision of AH.

Affordable Housing viability assessment plus payment of external assessor fee

When required:

Where 10 or more new or additional units of residential accommodation will be created or where 9 or less units are proposed and the site area is 0.5 hectares or more.

Where it is stated in the **Affordable Housing Statement** that the scheme cannot viably provide affordable housing then the submission must be accompanied by a

- Affordable Housing Viability Assessment.
- Payment of the initial appropriate fee for independent external assessment.

If the applicant does not want the Affordable Housing Viability Assessment to be independently assessed and/or does not want to pay the fee, **then the applicant will be required to state in their Affordable Housing Statement that they understand that the proposal would not accord with development plan policies in that regard and is likely to be considered unfavourably.**

Developments Requiring Environmental Impact Assessment (EIA)

Environment Statement

When Required

Will be required for all developments falling within Part 1 or Part 2 of the EIA Regulations.

Minerals & Waste Developments

Planning Statement

Whilst this is only a validation requirement for Mineral and Waste schemes, they are a helpful tool for officers in the assessment of planning applications more generally.

A planning statement can provide an overview and explanation of a proposal. It can include an assessment of how the proposed development accords with relevant national and local planning policies

Land registry Documents

A Land Registry Official Copy of the Register of Title to the Land and Title Plan. These must be dated within the last 3 months. Please note that if you are supplying a Schedule of Leases you will need to ensure that copies of the Register of Title to the Land and Title Plan are supplied for each lease. Please ensure that this information corresponds with the ownership certificates on the application form before submitting the application.

A Search of Index Map (SIM) for application sites that have complex titles e.g. leaseholds, more than one freehold title, if it is unclear whether the red line goes over any other land etc. This provides a detailed list of all titles included in the red line site plan and therefore all titles that will need to be included in the section 106 agreement. The SIM search needs to be conducted against the red line plan and not the title plan. This can be done at the land registry online www.gov.uk/get-information-about-property-and-land/search-the-index-map for a small charge (which includes up to 5 titles). We will accept proof that you have requested the SIM search from the land registry (a copy of the application that you have made to the land registry) and allow the results of the search to be submitted to us within the next 14 days.

If the land required for the proposal is not registered with the Land Registry the onus is on the applicant to prove ownership/title and a Certificate of Title from a Solicitor will be required instead of Land Registry documents. We would accept a solicitor's letter of undertaking on their letterhead in the form of a one page document, headed Certificate of Title, signed by the solicitor stating their qualifications and dated.

On the Certificate, it must show:

- who owns the property
- whether there are any leaseholders, and
- confirmation of any legal charges and mortgagees on the land.

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Policy map specific requirements

To understand whether your proposal falls within the below zones, please use the mapping - [Aurora](#)

Energy and Resource Statement (Poole residential and commercial developments)

For applications that fall to be considered under the Poole Local Plan all proposals for the creation of new dwellings or 1000m² of non-commercial floor space.

Elsewhere if the proposal is for 10 or more dwellings or 1000m² of non-residential floor area.

This document should demonstrate how the proposal complies with the requirements of Policy PP37 of the Poole Local Plan, and notably, set out how the proposals would incorporate a proportion of future energy use from renewable energy sources. This proportion is a;

- Minimum of 10% for proposals of 1-10 homes (net) or under 1,000 sq. m (net) commercial floor space; and
- a minimum of 20% for proposals of 11 or more homes or over 1,000 sq. m commercial floor space.

Such renewable energy source, if constituting development, must be included on the plans.

A BREEAM pre-assessment should accompany the Energy and Resource Statement for **non-residential schemes**. This is not required for residential schemes.

Nutrient Neutrality Catchment Area (Phosphates and Nitrates)

Development located within the catchment of the [River Avon or the Poole Harbour catchment](#) and proposes additional overnight accommodation will need to mitigate the impact of such development.

Under Habitats Regulations, before giving permission, the Council must be satisfied that proposed development will not adversely affect the integrity of the habitats site because of in a net increase in nitrogen and/or phosphorus entering catchment areas. This includes planning applications at the reserved matters approval stage of the planning application process, technical details consent and discharge of pre commencement conditions. Natural England have defined catchment areas in the area around the following internationally designated habitats.

The types of additional development which may result in additional nitrogen and/or phosphorus and a decline in condition are all types of overnight accommodation which includes:

- a net gain in residential units;
- residential institutions, including student accommodation, boarding schools residential colleges and training centres;
- tourism accommodation including overnight tourist accommodation, including self-service and serviced tourist accommodation such as hotels, guest houses, bed and breakfasts, self-catering accommodation including holiday chalets and static caravan sites, caravan and touring holiday accommodation, camping/glamping sites, yurts, shepherd's hut, and 'pop' up or temporary camp sites;
- specialist housing e.g. care homes and retirement homes;
- commercial or industrial developments that include overnight accommodation;
- employment sites where employees will be hosted from outside of the catchment, and/or the development includes overnight accommodation.

Other types of business or commercial development, not involving overnight accommodation, will generally not need to be included in the assessment unless they have other (non-sewerage) water quality implications. Whilst nutrient neutrality is only currently being applied to development that would result in a net increase in population served by a wastewater system, the Habitats Regulations requirements will apply to any plans or projects, including agricultural or industrial plans and projects that have the potential to release additional nitrogen and/or phosphorus into the system.

Further information regarding mitigation, including how to purchase credits, within the [Poole Harbour catchment](#) and [River Avon Catchment](#) are available on the Council's website.

Requirements of the Nutrient Neutrality Statement

The Nutrient Neutrality Statement should include;

- details of arrangements for managing wastewater and surface water arising from the development;
- a nutrient budget calculation for nitrogen made using the Natural England nutrient calculator for Poole Harbour ([the latest calculator is currently May 2024](#)); and
- details (including how this mitigation will be delivered and secured in perpetuity) of the mitigation proposed to offset nutrient loading.

The Nutrient budget calculator

Developers must use nutrient budget calculations to show that their proposals will not bring about a net increase in nutrient pollution to specific habitats sites. Some

local planning authorities also have their own nutrient neutrality calculators which can be used.

The nutrient neutrality calculators are for:

- developers who need to complete a nutrient budget calculation to support a planning application
- local planning authorities who need to understand the mitigation requirements for future development or to assess planning applications

Details of how to complete the calculators and the calculators themselves, can be found online, via the below links;

- [River Avon SAC](#)
- [Poole Harbour](#)

Flood Risk Assessment (FRA)

When required

If the site is in the;

- Environment Agency's Flood Zone 1 and over 1 ha, or in Flood Zones 2 or 3 and/or
- Located within the future flood risk zones ([LINK](#)).

Details of what is required within a flood risk assessment are provided [here](#)

Any FRA should clearly demonstrate mitigation measures and link to drainage strategy where appropriate.

Flooding Sequential Test

The Sequential Test is required for all sites in Flood Zones 2 & 3, except where:

- is a householder development like residential extensions, conservatories or loft conversions
- is a small non-domestic extensions with a footprint of less than 250 square metres
- is a change of use (except changes of use to a caravan, camping or chalet site, or to a mobile home or park home site)
- is laid out so that only elements such as public open space, biodiversity and amenity areas are located in areas at risk of any source of current or future flooding
- is solely at risk from surface water flooding and a site-specific FRA demonstrates it will be safe throughout its lifetime, without increasing flood risk elsewhere – this exemption does not apply to sources of flooding other than surface water
- is a development on a site allocated in the development plan through the sequential test, and:
 - the proposal is consistent with site's allocated use; and

- there have been no significant changes to the known level of flood risk to the site, now or in the future, which would have affected the outcome of the test

Sequential Tests for Main Town Centre Uses

Local planning authorities should apply a sequential test to planning applications for main town centre uses which are located outside of an existing centre. Main town centre uses should be located in town centres, then in edge of centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out of centre sites be considered.

Main town centre uses comprise - Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

This sequential approach should not be applied to applications for small scale rural offices or other small scale rural development.

Main Town Centre use impact assessment

If the proposal is for a main town centre use outside of the Town Centre use over 2,500m² of gross floorspace, an Impact assessment is required. This should include assessment of:

- (a) the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- (b) the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and the wider retail catchment (as applicable to the scale and nature of the scheme).

Main Town Centre uses comprise: Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).

Heritage Statement

For any proposal affecting a listed building, conservation area, registered park and garden, locally listed building, scheduled monument or archaeological site, Historic

park and gardens, regardless of the type of application (i.e. householder, advertisement, outline, full planning)

Tree Survey/ Arboricultural Impact Assessment/ Method Statement

If any tree is within falling distance of any proposed work; if there is a Tree Preservation Order (TPO); or the application site is within a Conservation Area. An Arboricultural Method Statement (AMS) that follows the guidance set out in sections 6 and 7 of BS5837:2012 Trees in relation to design, demolition and construction – Recommendations is required.

The Arboricultural Method Statement will include all measures considered necessary at the application stage to ensure that trees to be retained are fully protected from demolition (if applicable) to completion of development, including landscaping. This

Coastal Vulnerability Zone (CVZ), Coastal Change Management Area, Cliff and Chine Stability Consultation Zone

Proposals within these above zones must be supported with a Coastal Vulnerability Assessment. This comprises and form (see [Section 5.4 & Appendix A](#) -) which must be completed and signed.

If a proposed development is also within a flood risk area, then a Flood Risk Assessment (FRA) will also need to be completed alongside a CVA (**see Section 4.4**)

The purpose of a CVA is to enable a risk-based approach to be taken to development within the coastal zone, and will ensure that the applicant has considered the relevant planning policies in relation to flood and coastal change risks as set-out in the BCP Local Plan and expanded upon in this document, such that the applicant:

- Is aware of and understands the relevant policies and management approach associated with the coastal risks in relation to the proposed development site.
- Demonstrates that the proposed development (including any new and/or servicing infrastructure) will not increase the risk of coastal change elsewhere, for example by increasing surface water run-off and groundwater levels that can lead to cliff instability.
- Demonstrates that the development (including any new and/or servicing infrastructure) will not conflict with the future coastal risk management approach of the wider area and/or adjacent sections of coast.
- Has considered how the development (including any new and/or servicing infrastructure) will be managed at the end of its lifetime*, including measures for the removal or relocation of the development before the site is threatened by coastal change.

- That decisions on investment in the development are made with a full understanding of the risks and uncertainties

Further information can be found within the [Flooding and Coastal Change Background paper](#)

Other documents that may be requested during determination of the application

Aerodrome Safeguarding Assessment

If the proposal will exceed the various height limitations within the aerodrome safeguarding zones; has potential to increase the bird hazard risk; lighting that has the potential to distract pilots, buildings, structures, erections of works which would infringe protected surface, obscure runway approach lights or have the potential to impair the performance or airport navigation aids, radio aids or telecommunication systems. The assessment should include: • details regarding the elevation of the site to an accuracy of 0.25 metres AOD (Above Ordnance Survey Datum); • landscaping details to enable assessment of likely bird attraction; and • materials proposed for assessment of potential radar reflection. Further information:

www.gov.uk/government/publications/safeguarding-aerodromes-technicalsites-and-military-explosives-storage-area

Air Quality Assessment

If the proposal is likely to generate high levels of air pollution or is inside or adjacent to an Air Quality Management Area (AQMA).

Badger, Bat or Barn Owl Survey

If the proposed development includes the following: Does the application include any building, or structure in any locality: • with an existing Dorset Environmental Records Centre (DERC) badger, bat roost, or barn owl record? • where the presence of either badgers, roosting bats or barn owls have been reported on site by the applicant, or a third party? Bat and Barn Owl Surveys are also required where the development includes the following: Any building, or structure over 5 years old: • with an enclosed roof space, or cellar, or similar feature, or agricultural barn in a rural, or village, locality. Or any building, or structure over 5 years old: • with an enclosed roof space, or cellar, or similar feature in a town, or urban locality, that is located immediately adjacent to protected wildlife sites (e.g. SSSI, SNCI), woodlands, parks, watercourses, railway embankments, large areas of rough grassland / scrub,

agricultural fields, large cemetery, golf course, or similar areas of green infrastructure. Where the application includes either the:

- Demolition of any building, or structure with an enclosed unconverted roof space, or cellar, or similar structure. Conversion of an attic space or barn / outbuildings (includes dormer window installation), or conversion of cellar.
- Extensions that tie into an existing enclosed roof space.
- Renovation of derelict building (structures with intact roofs, or cellars).

Cycle Store details

Where the proposal includes cycle stores drawings showing the location, floor layout and elevations of the proposed cycle storage must be submitted, and details of materials to be used in the construction included on the application form. Cycle stores should be designed and sited to minimise their impact and either incorporated internally as part of the building or sited behind the building line.

Drainage/SUDS

If the proposal is for a new building, to increase the footprint of an existing building and/or the development of car parking and/or any other hard standing/impermeable surface. The information submitted should include:

- Details of the sustainable urban drainage system, for example, the soakaway system to be used
- the drainage points and channels / routes shown on an application plans/drawings

Soakaways are specifically banned along the cliff top because they put all the rain water that was previously evenly distributed across the site, into the ground at a point but that does not necessarily mean that other forms of SUDS will be acceptable.

Where development is within 200m of the cliffs proposals should be discussed with Wessex Water before making the application as soakaways will not be suitable and details of a drainage system will need to be submitted with any planning application

A statement giving details of the proposed provision for maintenance. Please note that any soakaway system will need to be at least 5 metres away from the building.. If the proposal is for new buildings, and/or to increase the footprint of an existing building, and/or the development of car parking and/or any other hard standing/impermeable surface, details of drainage systems should be indicated on any plans and drawings.

Geotechnical report

Details of what is expected to be included within a Geotechnical Appraisal Report can be found on page 65 (Annex A1) of [TCC9 FCERM Background Paper June 2024](#)

Lighting Assessment

For major developments; or schemes involving the provision of floodlighting; or where the lighting from the proposal would result in a material impact.

Minerals Assessment

Where prior abstraction is required.

Noise Impact Assessment

Where the development would raise issues of disturbance by noise to the occupants of nearby residential buildings, and for developments that are noise sensitive

Planning Statement

A planning statement can provide an overview and explanation of a proposal. It can include an assessment of how the proposed development accords with relevant national, local and Neighbourhood Plan planning policies.

Retail Impact Assessment

If the development proposal could harm the vitality and viability of existing shopping centres e.g. town centres

Refuse disposal and details of Bin Stores

Where bin stores are required, details of the location, elevations and materials to be used in the construction of a bin store suitable for housing wheeled or euro bins shall be submitted as part of the application. Bin stores should be designed and sited to minimise their impact and wherever possible be incorporated internally as part of the building or sited behind the building line.

Tourism Viability Report

Where development relates to the loss of tourist accommodation, or the loss or change of use of a tourist or cultural facility. For the loss of a site or premises used, or last used, as tourist accommodation the report will need to include evidence to demonstrate that the:

- business is no longer viable and has no reasonable prospect of continuing; and the
- loss of the tourist accommodation will not harm the function of the area in relation to the tourism industry and the local community. For the loss of a site

or premises used or last used, as a tourist or cultural facility the report will need to include evidence to demonstrate that:

- the current use is no longer viable;
- there is no reasonable prospect of the use continuing; and
- It has been actively marketed with a guide price reflecting its market value for a period of 12 months. For the change of use of a site or premises used or last used, as a tourist or cultural facility the report will need to explain how the new use will maintain:
- the function of the area in relation to the tourism industry and the local community; and
- the character and appearance of the area

In addition, policies in the [Sandbanks Peninsula NP](#) (*Sand10: Existing hotels*) requires additional information where services within a hotel are lost

Transport Statement and assessments

When required

Transport Assessments and Statements are all ways of assessing and mitigating the negative transport impacts of development in order to promote sustainable development. They are required for all developments which generate significant amounts of movements.

What is required

Transport Statements should accord with the requirements set out by the PPG. [Travel Plans, Transport Assessments and Statements - GOV.UK](#)

Transport Assessments are thorough assessments of the transport implications of development, and Transport Statements are a 'lighter-touch' evaluation to be used where this would be more proportionate to the potential impact of the development (ie in the case of developments with anticipated limited transport impacts).

Transport Assessments and Transport Statements primarily focus on evaluating the potential transport impacts of a development proposal. (They may consider those impacts net of any reductions likely to arise from the implementation of a Travel Plan, though producing a Travel Plan is not always required.) The Transport Assessment or Transport Statement may propose mitigation measures where these are necessary to avoid unacceptable or "severe" impacts. Travel Plans can play an effective role in taking forward those mitigation measures which relate to on-going occupation and operation of the development.

Transport Assessments and Statements can be used to establish whether the residual transport impacts of a proposed development are likely to be "severe", which may be a reason for refusal, in accordance with the National Planning Policy Framework.

Such statements should accord with ATE Guidance - [Active Travel England Standing Advice Note: Active travel and sustainable development](#)

Travel Plan

When are they required

Travel Plans are all ways of assessing and mitigating the negative transport impacts of development in order to promote sustainable development. They are required for all developments which generate significant amounts of movements.

What do they need to include?

The primary purpose of a Travel Plan is to identify opportunities for the effective promotion and delivery of sustainable transport initiatives eg walking, cycling, public transport and tele-commuting, in connection with both proposed and existing developments and through this to thereby reduce the demand for travel by less sustainable modes. As noted above, though, they should not be used as way of unfairly penalising drivers.

Travel Plan

For development that may have significant impacts on the transport network. The Travel Plan should outline the way in which the transport implications of the development are going to be managed in order to ensure the minimum environmental, social and economic impacts. Further advice is available in the Communities and Local Government publication 'Good Practice Guidelines: Delivering Travel Plans through the Planning Process 2009'.

Ventilation/ Extraction Statement

Where the development is likely to require ventilation or extraction full details of the position and design of ventilation and extraction equipment should accompany the application and be included on plans/drawings. Where the equipment is included on the application drawings, enclosing a copy of the manufacturer's specification with the application will usually provide sufficient technical detail. All applications for hot-food take-aways, bars/pubs, restaurant uses and launderettes etc. will need to include this information. Details will also be required for retail, business, industrial, leisure or other developments where substantial ventilation/extraction equipment is proposed to be installed.

APPENDIX 1: Matrix

(inserted as a A3 PDF)

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Appendix 2: Validation Check List in List Form

Householder

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50 OR dimensioned)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Parking plan (if changes in parking arrangements) (1:100 or 1:50 OR dimensioned)
- Roof plans (existing and proposed) (1:100 or 1:50 OR dimensioned))
- Correct Fee

If within relevant Mapped Zone;

- Flood Risk Assessment (proportionate to the scale of the development) if located within Flood Zone 2, 3 and/or future flood risk zones
- Heritage Statement (proportionate to the scale of the development) if adjacent to Conservation Area or Listed Building.
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / if the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Householder and Listed Building Consent

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50 OR dimensioned)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Parking plan (if changes in parking arrangements) (1:100 or 1:50 OR dimensioned)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Heritage Statement

If within relevant Mapped Zone;

- Heritage Statement (proportionate to the scale of the development) if adjacent to Conservation Area or Listed Building.
- Flood Risk Assessment (proportionate to the scale of the development) if located within Flood Zone 2, 3 and/or future flood risk zones
- Heritage Statement if adjacent to Conservation Area or Listed Building.

- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / if the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Application for Planning Permission

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Application for Planning and Listed Building Consent.

- Application form

- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Heritage Statement
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Application for Listed Building Consent.

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and sections (existing and proposed) (1:100 or 1:50) (if excavation e.g. pools are proposed)

- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Heritage Statement

Application for Planning Permission and consent to display an advertisement

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement
- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents

- agreement to pay legal fees

Application to display an advert

- Application form
- Ownership Certificates
- Location Plan/ Block Plan
- Site Plan
- Existing and proposed elevations and floor plans
- Car parking plan (existing and proposed) (if proposal would be located within the parking area or access).
- Other plans and drawings// photographs to support application
- Heritage Statement if within a Conservation Area or within setting of a Listed Building.
- Correct fee

Outline Planning Permission

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee
- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

If in mapped zone

- If in Flood Zone 2/3 and / or the future flood risk zone. - Flood Risk Assessment
- If adjacent to a Conservation Area or Listed Building, within a Conservation Area - Heritage Statement
- Arboricultural Impact Assessment – if the proposals are likely to impact trees (including TPOs), / whether the development is within falling distance of a tree.
- Coastal Vulnerability Zone – complete coastal vulnerability assessment, and any associated documents required by it

Based on Development Type

- If the proposal is within Nitrate/ Phosphate Neutrality area and proposes any overnight accommodation – submission of up to date completed relevant nutrient neutrality calculator.
- If the proposal is for 10 or more dwellings - Affordable housing statement

- If the proposal is for 10 or more residential units, and is arguing that the scheme cannot provide a policy compliant level of affordable housing - Affordable housing viability statement, plus payment of assessor fee
- For proposals resulting in a net gain in dwellings
 - Draft S106/S111
 - land registry documents
 - agreement to pay legal fees

Certificate of Lawful Development (Proposed)

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

Certificate of Lawful Development (Existing)

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

Approval of details reserved by condition

- Application form
- Ownership Certificates
- Other Plans and drawings/ photographs to support application.
- Payment of correct fee

S.73 – removal or variation of condition following grant of planning permission.

- Application form
- Ownership Certificates
- Location Plan (1:1250 or 1:2500)
- Site Plan / Block Plan (1:200 or 1:500)
- Existing and proposed elevations and floor plans (1:100 or 1:50)
- Ground levels and section plans (existing and proposed) (1:100 or 1:50) (if excavation e.g. basements, pools are proposed)
- Roof plans (existing and proposed) (1:100 or 1:50)
- Correct Fee

- Design and Access Statement, when in a Conservation Area and;
 - 1 or more dwellinghouses
 - Major developments
 - Build(s) with new floorspace is 100sqm or more.
- If the changing change approved Biodiversity Gain;
 - Biodiversity Net Gain (BNG) checklist (completed with required information/ photos/ reports etc provided)

Non-material amendment

- Application form
- Ownership Certificates
- Other plans, documents, and drawings/ photographs to support the varied condition.
- Payment of correct fee

Prior Approval Applications

See individual application forms and the relevant Class in the Town and Country Planning (General Permitted Development) (England) Order 2015 (as amended) for the requirements to be submitted within each specific prior notification.

Minerals and Waste applications

Please see national Guidance.

Proposals accompanied by an Environmental Statement

Validation requirements are bespoke for these developments.

Forms

Planning application biodiversity checklist (not BNG)

The final column of the checklist should be completed by the applicant/agent to indicate the level of information submitted with the application. In some cases, a written statement explaining that the identified feature is outside of the development footprint/ boundaries and therefore not affected by the proposal may be sufficient. In other circumstances, a more formal ecological impact assessment and/or survey may be required.

Please note that where there is an existing Dorset Environmental Records Centre (DERC) record of a badger, bat roost, or barn owl relating to the site or a building or structure within it, or where the presence of badgers, roosting bats or barn owls have been reported on site by the applicant, or a third party, a bat, barn owl or badger survey will be required.

All information provided will be reviewed by the Council's Ecological Officer. Further supporting information may be requested.

Biodiversity features		Yes	No	Consider impact on the following:	Supporting information provided?
Trees/vegetation	Small areas of woodland, thick scrub or orchards within the site or immediately adjacent to the site			Nesting birds Bats and bat roosts Stag beetles	
	Mature trees with a circumference greater than one metre at chest height or smaller trees that exhibit holes, cracks, splits, cavities, etc.			Other notable species of principal importance	
	Mature/overgrown garden, rough grassland, derelict land, brownfield railway sidings or allotments – any of these features on or directly adjacent to the site.			Nesting birds Other notable species of principal importance	
	Hedgerows or scrub, within the site boundary, where connected to woodland, mature trees and other hedgerows outside of the site boundary.				

	Species rich meadow or grassland or coastal grassland on or immediately adjacent to site.				
	Biodiversity features	Yes	No	Consider impact on the following:	Supporting information provided?
Watercourses	Watercourse within 25m of application site			Amphibians (Note: Great Crested Newts have been recorded with the BCP area but are rarely found)	
	Ponds within 100m of the development site boundary, where the surface area of the pond, when water is at its highest level, is 50sqm or more, particularly where connected to the application site by hedgerows, woodland, grassland or field boundaries.				
Buildings	Demolition of buildings with gable ends, traditional clay tile roofs or slate roofs, hanging tiles, weatherboarding, timber cladding, where within 200m of woodland, water or open space such as parks, golf courses, cemeteries, agricultural fields and railway embankments (including nationally and locally protected sites such as SSSIs, SNCIs, Local Nature Reserves etc.).			Bats, bat roosts and bird roosts	
	Conversion of current enclosed loft/roof space buildings with gable ends, traditional clay tile roofs or slate roofs, hanging tiles, weatherboarding, timber cladding, where within 200m of woodland, water or open space such as parks, golf courses, cemeteries, agricultural fields and railway embankments (including nationally and locally protected sites				

	such as SSSIs, SNCIs, Local Nature Reserves etc.).				
	Underground structures (e.g. cellars/caves).				

Coastal Vulnerability Assessment Template, including Geotechnical Appraisal Report Requirements

1. Applicant's name:

.....

2. Agent's name (if applicable):

.....

3. Development proposal title:

.....

4. Development location / address:

.....

5. Pre-application details (if applicable):

.....

6. Which Shoreline Management Plan policy unit(s) cover the development frontage?

.....

7. Which FCERM Strategy covers the development frontage?

Poole Bay, Poole Harbour & Wareham FCERM Strategy	Yes / No
Christchurch Bay & Harbour FCERM Strategy	Yes / No

8. Which FCERM Strategy unit(s) cover the development frontage?

.....

9. Which BCP Sea Cliff and Chine Asset Unit(s) does the development cover?

.....

10. Which risk zone(s) does the development sit within (select "Yes" for all that apply):

Coastal Change Management Area (CCMA)	Yes / No
Coastal Vulnerability Zone (CVZ)	Yes / No
Cliff and Chine Stability Consultation Zone	Yes / No
Flood Zone <i>(if yes, please also complete a separate Flood Risk Assessment)</i>	Yes / No

11. Development category (select “Yes” for all that apply if mixed development):

New residential development	Yes / No
New non-residential development	Yes / No
Extension to existing development	Yes / No
Modification to existing development	Yes / No
Temporary buildings, caravans and land uses	Yes / No
Temporary beach pop-up or similar short term seafront installations <i>(If yes, please also refer to the BCP FCERM Guidance for Beach Pop-Ups and other Temporary Seafront Installations – Appendix B of the “Flooding & Coastal Change in BCP” document)</i>	Yes / No
Infrastructure	Yes / No
Other (please state):	Yes / No

Please provide detailed answers (with supporting evidence as appropriate) to the following:

12. What is the nature and the scale of the proposed development?

.....

13. What impact will the location of the development have for other properties in the adjacent area?

.....

14. Provide details of the predicted shoreline and/or cliff top position in relation to the proposed development. Is the proposed development expected to be lost to the sea, and if so, when?

.....

15. Provide details of measures required to protect the proposed development from loss during its design life. How will the development be safe through its planned lifetime, without increasing the risk to life or property, or requiring new or improved coastal risk management structures or cliff slope stabilisation measures?

.....

16. Provide details of measures required to provide safe access and egress for the site and its users over its planned lifetime?

.....

17. How will the development enhance the ability of communities and the natural environment to adapt sustainably to the impacts of a changing climate?

.....

18. Demonstrate that the development will not affect the stability of the coast or exacerbate the rate of shoreline change.

.....

19. Demonstrate that the development will not cause cliff destabilisation caused by the presence of groundwater in or close to the cliff face due to land drainage and run-off issues. *Please provide a Geotechnical Appraisal Report appended to this Coastal Vulnerability Assessment that follow the requirements provided in **Annex A1**.*

.....

20. Set out details for how the development will be managed at the end of its planned lifetime.

.....

21. Where appropriate, provide evidence of wider sustainability benefits that outweigh the impact of coastal change.

.....

22. Any other relevant information.

.....

23. Declaration:

I understand that the information contained in the Shoreline Management Plan and relevant FCERM Strategy is subject to change and contains the following uncertainties:

- Future coastal change / erosion risk trends are not predicted with certainty and future shoreline positions are shown as indicative bands of risk at a range of future intervals. These assessments will change over time as more evidence is captured and analysed.
- Where future policies or strategic approaches are based upon the provision and maintenance of coastal risk management structures to resist coastal change, it is not possible to guarantee that funding will be available to deliver this objective.
- It is possible that where the provision and maintenance of coastal risk management structures is required to sustain a development over its planned lifetime, then a contribution toward the cost of structure management may be sought from the beneficiaries (including owners/occupiers of properties protected by the structures).
- Policies and strategic approaches to implement them are reviewed and updated at regular intervals, and may be changed to something less favourable than indicated at present.

I confirm that the development proposal is made with a full understanding and acceptance of the risks associated with coastal change contained in the relevant parts of the Shoreline Management Plan, relevant FCERM Strategy(ies) and also the uncertainties listed above.

24. Signed by the applicant:

.....

25. Printed name:

.....

26. Date:

.....

Annex A1 Geotechnical Appraisal Report Requirements

A.1 Approaches to the investigation of coastal land instability

Ground investigations are undertaken to determine site specific geology, geomorphological processes and the geotechnics of erosion or instability problems in an area.

The approach to geotechnical investigations can vary, and there is a range of national standards, technical documents and general literature that provide guidance for the geotechnical investigation of instability problems in the UK. However, Chapter 4 of the *Cliff Instability and Erosion Management in Great Britain: A Good Practice Guide* (Halcrow, 2011) provides a concise overview of the most appropriate approaches for investigating coastal land instability, including the use of early warning and monitoring systems and the value of ground stability (a.k.a. geotechnical appraisal) reports in ensuring that appropriate expert assessment and evaluation of land stability has been considered in producing development proposals (refer to Section A.2).

A.2 Suggested structure and content of Geotechnical Appraisal Reports

Geotechnical Appraisal Reports prepared to support a planning application are recommended to broadly adhere to the following structure (adapted from Halcrow, 2011):

- 1) **Introduction:** a statement indicating for whom the work was done, the nature and scope of the investigation, its general location, its purpose and the period over which it was carried out.
- 2) **Description of History:** a detailed description of the site based on observations made by a Competent Person (i.e. a chartered geomorphologist, geologist or engineer with experience of coastal cliffs and landslides) during a site reconnaissance. It should be referenced to a plan of the site showing national grid co-ordinates and to a scale no smaller than 1:2,500. Use of GIS is recommended to manage spatial data.
- 3) **Investigations:** information consulted during the course of the desk study should be referred to and listed as an appendix. Fieldwork should be described and full records of boreholes, trial pits or other exploratory methods included as an appendix and their locations shown on a plan. Site tests and laboratory tests and methods should be similarly described and their results included.
- 4) **Ground Conditions:** descriptions of the ground conditions found during the investigation and an interpretation of their relevance to the stability of the site and surrounding area. Anomalies in any of the data collected should be pointed out. The following items should be discussed, where appropriate: geological

conditions, hydrogeology, history of past events and ground movement rates, soil and rock properties, other factors (e.g. coast protection).

5) **Evaluation of Stability:** the global stability of the site and relevant adjacent area should be evaluated with respect to the proposed development and the assessment of ground conditions. Where global stability calculations are carried out, the method of analysis shall be stated. The global stability calculations must demonstrate both the existing factors of safety and, where appropriate, the factors of safety that would be created by the proposed development and any associated stabilisation measures.

Where structures or services are present and adjacent to the proposed site/works and there is potential for the temporary or permanent works to induce deformation, displacement or settlement, a detailed assessment is to be undertaken to demonstrate that deformations, displacements, or the induced settlements generated are within tolerable limits for both the temporary and permanent condition.

It is expected that particular attention should be paid to the gradients of cut slopes and fills, applied loads (for both the temporary and permanent state), drainage measures, retaining structures/lateral support measures, failure mechanisms and the design criteria applied must comply with the appropriate codes of practice, standards, Eurocodes and national annexes.

6) **Conclusions and Recommendations:** the Competent Person should summarise the main conclusions of the investigation and list the recommendations to ensure both the long-term stability of the site (taking account of the anticipated life of the development) and also in the short term whilst construction proceeds (i.e. ensure the stability of the temporary works). It is expected that particular reference will be made to matters such as: the avoidance of material storage/imposed loads near the crest of steep slopes, restrictions on the depth of excavation at the toe of steep slopes, the maximum length of trenches excavated along the contours of steep slopes at any one time, avoidance of septic tanks and soakaways, provision of flexible jointed pipes capable of sustaining small movements without leakage, provision for free drainage of groundwater, minimising drainage diversions and their lining where site conditions require them.

A.3 Geotechnical Appraisal Report Declaration Form

Alongside the Geotechnical Appraisal Report, the following declaration form should also be submitted (adapted from Halcrow, 2011):

Site Name	?
Site Address	?

Category	Question	Answer Yes / No / Uncertain / n/a
A) Competent Person	Has a Competent Person or Geotechnical Specialist prepared the report?	
	Does the Competent Person or Geotechnical Specialist operate a Quality System which meets the requirements of BS EN ISO9001?	
	Does the Competent Person or Geotechnical Specialist have a minimum of £1m Professional Indemnity Insurance?	
B) Site History	Has the site been affected by past ground instability?	
	Is the site located within or adjacent to any instability features?	
C) Site Inspection	Has a detailed site inspection been carried out?	
	Does the site and adjacent land bear any geomorphological evidence of past or incipient ground instability?	
	Does the site or neighbouring property bear any evidence of structural damage or repairs that might be associated with ground instability?	
D) Geotechnical Desk Study	Have any previous ground investigation reports and/or borehole records from the site been consulted?	
	Is the information consulted and referred to sufficient to quantify the ground behaviour constraints, which could affect the stability of the site?	

E) Ground Investigation	Has a ground investigation been carried out and have the results been submitted in support of this application?	
	Did the investigation identify the presence of subsurface shear zones and low strength compressible soils at the site?	
	Is the information sufficient to quantify the ground behaviour constraints, which could affect the stability of the site?	
F) Stability Assessment	Is the information in B, C, D and E (where applicable) adequate to assess the stability of the site and adjacent land?	
	Can ground instability reasonably be foreseen within or adjacent to the site within the design life of the proposed development, allowing for any deterioration of ground conditions caused by the development itself?	
	Can instability be reduced to a reasonable level through cost-effective mitigation and stabilisation measures that would be environmentally acceptable?	
G) Mitigation Measures	Have mitigation measures been proposed with respect to ground instability issues?	
	Have these been designed to reduce the effects of actual or potential instability to tolerable/allowable limits?	
	Is it possible the mitigation measures may have an adverse effect on the stability of other, adjacent sites (for example by affecting groundwater drainage in the area)?	

H) Name, Qualifications and Signature of Person Responsible for the Geotechnical Appraisal Report	Full Name: Qualifications: Signature: Company Represented (if applicable):
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BNG Checklist

1. Are you applying for an exemption from BNG?
 - Yes ☐
 - No ☐ If selected, go to question 4;
2. If yes, please select your exemption;
 - De-minimis ☐ If selected, go to question 3
 - Self-Build ☐ If selected, please fill out the [self-build proforma](#)
3. If you have selected de-minimis, please provide;
 - **A Biodiversity Net Gain Statement** to include;
 - dated aerial photographs and
 - dated photographs of all parts of the site and,
 - a written explanation of why the applicant considers the exemption to apply.
4. If no exemption is applicable, the below must be provided;
 - **Up to date Statutory Biodiversity Metric** completed by a competent person, to include all existing habitats at baseline, those existing habitats to be retained or enhanced and any new habitats to be created. A Small Sites Metric may be provided in accordance with these details - .
 - **Completed Condition Assessment forms** for each existing habitat that has been assigned a 'condition' within the metric (applicable when using the Statutory Biodiversity Metric);
 - A **Biodiversity Net Gain Statement** to include:

- dated aerial photograph/s;
 - dated photographs showing all parts of the site and each habitat parcel within the site;
 - a description of each habitat parcel;
 - steps taken to minimise the adverse effect of the development on the onsite habitat and other habitat within adjoining or nearby sites;
 - details of how the biodiversity gain hierarchy has been applied in the design of the development to maximise the retention and enhancement of existing habitat and creation of new habitat onsite. Please see here for further details of what is expected to this part of the assessment [LINK](#).
 - details of how the proposed habitat relates to and helps provide connections to habitat within surrounding sites.
- **Habitat plans** – Clearly defining the individual habitat parcels. Habitat plans for both baseline (existing) habitat and post development onsite habitat should be provided;
 - Where any 'significant' biodiversity gains are proposed, **a draft Habitat Management and Monitoring Plan (HMMP)**. This will be likely be required where habitats such as trees and other habitats of medium or higher distinctiveness are proposed. The Defra [Habitat Management and Monitoring Plan Template - JP058](#) should be used. This will set out full details of how the habitat will be managed and maintained for a minimum of 30 years and will enable agreement on the monitoring frequency for proposed habitats. It will also include full details of who will be responsible for the management and maintenance of the habitat, and for reporting to the council on the success of the habitat.
 - Where there are no significant biodiversity gains and for all other ecological enhancements, **a draft Landscape and Ecological Management Plan** will be required.

The Biodiversity Metrics, User Guides and Condition Assessments can be accessed here: [Statutory biodiversity metric tools and guides - GOV.UK](#)

*The Small Site Metric User guide sets out the circumstances when the small site metric can or cannot be used.

Please also see BCP's BNG Guidance [LINK](#)

Self-build/Custom house building BNG exemption proforma

This form should be completed and submitted with an application where an exemption from mandatory Biodiversity Net Gain is claimed due to the proposed development being for self-build or custom build housing.

Applications claiming self-build exemptions need to be supported with the following information:

Completed pro-forma to confirm the applicant agrees that the development meets the definitions of self-build and custom housebuilding as set out in the Act;

Land registry documents (title and deed) dated within the last 3 months

It is also highly recommended that the baseline habitat value is also submitted along with photographs demonstrating the habitats onsite.

These proposals will be subject to a legal agreement that will secure the use of the dwelling as self-build as defined in the Act for a period of 3 years following decision. This will show in conveyancing searches.

Please note that if the dwelling does not meet the self-build definition at any point within these three years following decision, then the applicant will become liable for fulfilling the statutory biodiversity gain condition.

If this occurs, the occupier will be responsible for supplying the following information and paying the relevant fee to discharge the condition:

A Biodiversity Metric with the baseline score calculated;

Dated photographs of baseline habitats and a dated aerial photograph of the site if possible;

A redline plan;

Land registry title and deeds dated within the last 3 months; and

A baseline habitat and post development habitat plan.

Please note that the suite of BNG information can be expensive. Further, the Town and Country Planning Act 1990 Schedule 7a, part 1, 6B states that if there is insufficient evidence of the baseline value from before the carrying out of the proposal, then the baseline value needs to include the highest biodiversity value that can reasonably be supported by the available evidence relating to the onsite habitat. As a 10% uplift from the baseline is required, this could mean that more units need to be purchased than if the baseline values are known and agreed with the LPA hence why it is encouraged that baseline habitat values are submitted with a planning application claiming this exemption.

Please complete sections 1-5 below.

1. Regulation 8 of the Biodiversity Gain Requirements (Exemptions) Regulations 2024 states that the following in relation to self-build and custom build applications.

8.-(1) The biodiversity gain planning condition does not apply in relation to planning permission for development which—

consists of no more than 9 dwellings;

is on a site that has an area no larger than 0.5 hectares; and

consists exclusively of dwellings that are self-build or custom housebuilding as defined in [section 1\(A1\) of the Self-build and Custom Housebuilding Act 2015](#) (“the 2015 Act”)

2. In the 2015 Act “self-build and custom housebuilding” is defined as meaning the building or completion by—

(a) individuals,

associations of individuals, or

persons working with or for individuals or associations of individuals,

of houses to be occupied as homes by those individuals.

However, it does not include the building of a house on a plot acquired from a person who builds the house wholly or mainly to plans or specifications decided or offered by that person.

3. The Government has also produced [Self-build and custom housebuilding guidance](#).

Information within it may provide assistance in interpreting the 2015 Act and in that respect, in considering whether the self-build and custom housebuilding exemption from mandatory Biodiversity Net Gain is relevant to a particular proposal. For example, the guidance identifies the following:

Self-build custom housebuilding covers a wide spectrum, from projects where individuals are involved in building or managing the construction of their home from beginning to end, to projects where individuals commission their home, making key design and layout decisions, but the home is built ready for occupation (‘turnkey’).

In considering whether a home is a self-build or custom build home, relevant authorities must be satisfied that the initial owner of the home will have primary input into its final design and layout.

Off-plan housing, homes purchased at the plan stage prior to construction and without input into the design and layout from the buyer, are not considered to meet the definition of self-build and custom housing.

4. Application details

Site address	Click or tap here to enter text.
Name of applicant	Click or tap here to enter text.

Email address	Click or tap here to enter text.
Phone number	Click or tap here to enter text.
Description of development	Click or tap here to enter text.

5. Please complete to confirm agreement of the following (please use 'fill and sign' to mark with a tick or cross).

☐ I confirm that the proposed development meets the definitions as set out within Regulation 8 of the Biodiversity Gain (Exemptions) Regulations 2024 and Section 1(A) of the Self-build and Custom Housebuilding Act 2015.

☐ I have submitted evidence in support of the planning application to demonstrate how the development meets the self-build/ custom build definitions and to enable the application to be validated.

☐ I confirm that I understand that the description of development may need to be worded/amended to reflect and include reference to the fact that the proposal relates to self-build or custom housebuilding

Signature and date

Signed Click or tap here to enter text.

Date: Click or tap here to enter text.

Please note: whilst self-build and custom build housing development may be exempt from the requirements of the statutory biodiversity gain condition requiring a 10% net gain in biodiversity, these applications will still be expected to demonstrate how they will achieve a measurable gain in biodiversity through habitat and species enhancements including bat/bird boxes, creation of hedgehog corridors through providing small gaps in fences, bee bricks and other measures, in accordance with the paragraph 180(d) of the National Planning Policy Framework

Please note: if it later turns out that the exemption is not applicable, the statutory biodiversity gain condition would apply. Commencing development which is subject to the biodiversity gain condition without an approved Biodiversity Gain Plan could result in enforcement action for breach of planning control.

DRAFT

CABINET



Report subject	Our people and communities: Subsidised Bus Services Review
Meeting date	4 February 2026
Status	Public Report
Executive summary	<p>During 2025/26 financial year the council will spend over £1.59m supporting subsidised bus services from a combination of council derived revenue budget and external grants. By 2027/28 the cost is forecast to exceed £2.0m. Continuing to fund the subsidised network in its current form is not sustainable.</p> <p>This report presents recommended changes to the network informed by a performance review including public consultation. The recommendation has been developed in partnership with morebus (main enhanced bus partnership operator).</p> <p>Whilst undertaking the review the council has engaged with the Department for Transport (DfT) Bus Reform Team throughout to ensure that the recommended revised subsidised network is eligible to be funded from the recently announced £2,621,127 Local Authority Bus Grant (LABG) 2026/27 revenue allocation.</p> <p>A report setting out the full planned investment of both the revenue and capital LABG allocations shall be presented to Cabinet in March 2026.</p>
Recommendations	<p>It is RECOMMENDED that:</p> <p>(a) Cabinet recommends to Council the phased withdrawal of the council bus subsidy budget commencing May 2026 resulting in the service changes set out in Appendix 4.</p> <p>(b) Cabinet recommends to Council the use of Local Authority Bus Grant to fund the revised subsidised bus network as set out in Appendix 4.</p>
Reason for recommendations	<p>The subsidy of local bus services is non-statutory, although Local Transport Authorities (LTAs) have a duty to assess the transport needs of their area and the impact of bus services being withdrawn, on the elderly, disabled, and people with mobility problems. There is a statutory duty for the council to provide transport services to schools to meet the requirements of the Education Act 1996.</p>

	<p>The council has undertaken a comprehensive review of subsidised bus services, including a public consultation, and worked in partnership with the local bus operator to develop the proposed revised subsidised bus network that minimises the impact on passengers/residents as follows:</p> <p>Evening and Weekend routes: with minimal adjustments these services to be operated commercially.</p> <p>Weekday routes: the majority either retained without adjustment, enhanced, or retained with minimal adjustment to make them commercial.</p> <p>Subsidised School Service Route 40 recommended to be discontinued at end of the 2025/26 academic year due to high cost per passenger journey, few and reducing numbers of passengers and there is an alternative commercial service covering most of the route indicating that the service is not essential.</p> <p>Subsidised School Service Route 425 recommended to be discontinued at end of 2026/27 academic year due to high cost per passenger journey and there are suitable alternative commercial services that cover most of the route. Reason for retaining this for a year longer than Route 40 is that the alternative journey is less direct with a need to change bus. Extending the service allows parents time to plan for change.</p> <p>Subsidised School Service Routes 81 is recommended to be combined with the 46 service to reduce the level of subsidy required.</p> <p>Routes 744 and 448 subsidies to be retained in their existing form due to them being considered good value for money.</p>
Portfolio Holder(s):	<p>Councillor Andy Hadley, Cabinet Member for Climate Mitigation, Energy and Environment</p> <p>Councillor Mike Cox, Cabinet Member for Finance</p> <p>Councillor Richard Burton, Cabinet Member for Children, Young People, Education and Skills</p>
Corporate Director	<p>Glynn Barton, Chief Operations Officer</p> <p>Cathi Hadley, Children's Services</p>
Report Authors	<p>Richard Pincroft, Head of Transport and Sustainable Travel</p> <p>John McVey, Sustainable Transport Manager</p>
Wards	Council-wide
Classification	For Recommendation

Background

1. Bus subsidy is funding provided by the council to support bus services (or part thereof) that would not otherwise operate, due to there being too few passengers to generate sufficient revenue to cover the cost of operating the service and generate a profit.
2. Most bus routes across BCP operate without extra financial help from the council. However, some routes with fewer passengers, such as evening and Sunday services, and some school services, or those that serve areas away from the busy roads, have needed financial support (subsidy) to keep running.
3. When subsidising a bus route, the council specifies the service that it needs to be provided and procures the service, usually via an open tender, to any interested operators.
4. The council has a statutory duty under the Education Act 1996 to provide home to school transport for eligible children of compulsory school age. To help councils to comply with this duty the Department for Education published guidance in 2024 titled *Travel to school for children of compulsory school age*.
5. Section 509AD of the Education Act 1996 requires local authorities to have regard to any wish of a parent to have their child educated at a school based on their religion or belief when exercising their school travel duties. This does not mean local authorities must arrange travel to a school with a designated religious character for a child whose parents have chosen it on the grounds of their religion or belief (unless the child would be eligible for free travel to that school due to extended rights to support low-income families to exercise school choice), and they should not have a blanket policy that they never provide travel assistance to schools with a designated religious character and may need to make decisions on a case-by-case basis if asked to exercise their discretionary power in relation to such a school.
6. A child under the age of 8 is eligible for free travel to their nearest suitable school if it is more than 2 miles from their home. A child aged 8 years or over is eligible for free travel to their nearest suitable school if it is more than 3 miles from their home. Extended rights also apply to support low-income families. For children aged 8 or over but under 11, assistance is provided to their nearest suitable school if it is more than 2 miles from their home. For children aged 11 to 16, assistance is provided to attend their nearest suitable school provided it is more than 2 miles but not more than 6 miles from their home, or to attend a school chosen on the ground of their religion or belief provided it is their nearest faith school and it is more than 2 miles but not more than 15 miles from their home.
7. A 'suitable school' for school travel purposes is a qualifying school that is suitable for the child's age, ability, aptitude and any special educational needs they may have. It should also be suitable for the child's sex, for example a girls' school could not be considered the nearest suitable school for a boy. 'Suitable school' does not mean the most suitable school for a child. Schools are able to meet a wide range of needs. The nearest secondary school to the home of a child of secondary school age, for example, will almost always be their nearest suitable school (provided it would be able to admit them).
8. When a local authority assesses whether the distance between a child's home and their school is further than the statutory walking distance, the route they measure must be the shortest route along which a child, accompanied as necessary, may walk in reasonable safety. This is not necessarily the shortest distance by road. The

route may also include footpaths, bridleways, other pathways and alternative entrances to the school.

9. The relevant guidance states journey times need to be taken into account. Young people should be able to reach their education or training without incurring such stress, strain, or difficulty that they would be prevented from benefiting from the education provided. For example, a young person should not have to make several changes of public service bus to get to their education or training, if that would result in an unreasonably long journey time. In this context, local authorities should consider which mode of transport will best meet the need to ensure a reasonable journey time.

Guidance suggests that a child of primary school age may reasonably be expected to travel up to 45 minutes, and a child of secondary school age may reasonably be expected to travel up to 75 minutes each way to access learning.

10. Based on the Education Act 1996 local authority guidance none of the subsidised school services are required to mitigate the nearest suitable school requirement.
11. Some school children and young people are eligible for free home to school transport due to special educational needs (SEN), disability or mobility problems. Typically, very few children with SEN, disability or mobility problems utilise the subsidised school services and are instead transported by more specialist travel solutions; parents who receive a mileage rate or taxis with Passenger Assistants which generally pick up multiple passengers on route to a school.
12. In 2023/24 the council funded bus subsidy budget was £868k. As part of 2024/25 budget setting in the MTFP, the budget was reduced by £155k to £713k. This was achievable at the time due to a Department for Transport (DfT) provided Bus Service Improvement Plan Plus grant (BSIP+). In addition, approximately £80k was provided by Children's Services.
13. In 2024/25, the council spent £1.59million to keep subsidised bus services running. Note that due to the need to renew a number of contracts this is expected to increase to more than £2million by 2027/28 if the network/services are not adjusted. £860k of the £1.59m came from council revenue and the remainder from the devolved Bus Service Operators Grant (BSOG) and BSIP+. In addition, approximately £84k was provided by Children's Services.
14. Decision making to balance the 2024/25 council budget in the MTFP included a proposed future year review of the services and potential phased removal of the Bus Subsidy budget across the 2026/27 and 2027/28 financial years, subject to full consideration of the public consultation outputs and a performance review. The current year (2025/26) budget is £713k plus £84k from Children's Services.
15. The subsidy of bus services is non-statutory. However, Local Transport Authorities (LTAs) have a duty to assess the transport needs of their area and the impact of bus services being withdrawn on the elderly, disabled, and people with mobility problems.
16. In addition to council derived bus subsidy funding, ringfenced support is currently provided from the devolved government's Bus Service Operators' Grant (BSOG), which now forms part of a Local Authority Bus Grant (LABG) settlement – see paragraph below. Support for the network is also currently provided across BCP by a temporary Bus Service Improvement Plan Plus (BSIP+) grant which was awarded to local authorities in previous financial years to help them support services in the aftermath of the Covid-19 pandemic.

17. The council has been allocated £5.64m of Local Area Bus Grant (LABG) funding for 2026/27 of which £2.62m is revenue and £3.02m is capital. LABG is being allocated to local authorities nationally to work with local enhanced bus partnerships with the principal aim of delivering Bus Service Improvement Plans (BSIPs) objectives. The revenue allocation is repeated in 2027/28 and 2028/29. The capital funding allocation is also repeated (and slightly inflated) for 2027/28 and 2028/29. A Cabinet paper shall be presented in March 2026 setting out the recommended investment of this grant. The LABG conditions preclude the direct 'like for like' replacement of council bus subsidy. The more LABG that is allocated to subsidising services the less grant is available to enhance and promote bus services, it is therefore very important that services that are considered essential are funded utilising LABG.
18. As the council was aware that the LABG would include the 'like for like' condition, it engaged with the DfT at the beginning of 2025, and it agreed that, subject to a full review of all subsidised local bus services and the council maintaining its 'overall base bus funding' (funding for buses in BCP from all sources), the LABG revenue element could be used to support contracted routes.
19. In mid-December 2025 and through further dialogue in January 2026, DfT confirmed that it would permit the council to utilise the BCP Local Authority Bus Grant (LABG) revenue allocation to fund bus subsidy at a higher level than the legacy BSOG payment. This is on the basis that the local network has been reviewed following consultation (see section below) and a performance review undertaken to demonstrate best value for money. It was also due to the council being able to demonstrate that the overall base bus funding across BCP from all sources is set to increase in 2026/27 owing to substantial amounts of Section 106 funding from the development industry being utilised to prime new services.

Existing Subsidised Services

20. The council currently subsidises 24 local bus service contracts – see **Appendix 1** for indicative route maps. These include six school services (two of these school routes are funded by Children's Services and were originally introduced to transport children with a statutory entitlement to home to school transport).
21. The two dedicated school buses funded through the Children's Services Home to School Transport budget historically carried high numbers of children with a statutory entitlement to free school transport. However, these numbers are now low, and it is likely to be more cost effective to meet this duty in other ways (smaller vehicle, network bus pass, or potentially parental payment).
22. The remainder of the routes are either Monday to Saturday day-time services, or Sunday and Evening Services for otherwise commercial services.
23. Many of the contracts are due for renewal by April 2027 which will very likely result in price increases which would need a substantial increase in BCP council derived subsidy to offset. One of the contracts, Service 20 (Poole to Castlepoint), is due for renewal by April 2026.

Public Consultation

24. On 25 March 2025, Council agreed to a full review of the subsidised local bus service contracts.

25. The review comprised of on-bus passenger surveys; analysis of passenger boarding information supplied by the bus operator, morebus; discussions with morebus; and a ['Have your say' public consultation](#) which ran from 9 July to 18 August 2025.
26. Residents were asked to give their opinions on the council's subsidised bus services with the option of completing paper questionnaires that were made available on the bus routes affected or by submitting responses online. The council's Consultation Team engaged an external research company to undertake the data entry and analysis. A summary of the outcome is attached as **Appendix 2**.
27. There were 2,989 responses to the consultation, 765 (25.6%) of these were received online and 2,224 (74.4%) were on paper questionnaires. Most respondents (2,589) indicated that they use at least one of the Monday to Saturday routes. 919 respondents used at least one of the Sunday services and 881 used the evening routes. 140 respondents identified as users of at least one of the school routes. The key themes from the public consultation were:

Evening Routes

28. 881 respondents identified as users of at least one of the affected Monday to Saturday evening routes.
 - Route 4: Poole - Broadstone - Merley – Wimborne (301 respondents)**
 - Route 8 & 9: Poole - Hamworthy - Turlin Moor - Upton - Creekmoor – Poole (297 respondents)**
 - Route 14: Poole - Bourne Estate – Wallisdown – Kinson (153 respondents)**
 - Route 16: Poole - Bourne Estate – Bournemouth (205 respondents)**
 - Route 25 & Route 26: Poole - Canford Heath - Tower Park (299 respondents)**
29. While evening bus users are disproportionately older, female, and living with disabilities, a significant proportion are younger adults and working age.
30. Core trip purposes include socialising, leisure, visiting family, shopping, attending medical appointments, and commuting to or from employment. Many users also rely on buses for caring responsibilities and volunteering.
31. Respondents fear increased isolation, loneliness, and poorer mental health if evening services are reduced or withdrawn. Many noted they would become housebound and unable to maintain community and family connections.
32. Without buses, many would be unable to access leisure, cultural venues, or evening appointments. Safety concerns were raised about walking long distances after dark, particularly for older people, women, and young people. Many described unmanageable journey times and disrupted routines.
33. Respondents highlighted that withdrawal would prevent them from accessing evening or night-shift employment in hospitality, healthcare, and retail. Alternative options, such as driving or taxis, were described as unaffordable.
34. Families with children, carers, and volunteers reported that withdrawal would make managing responsibilities extremely difficult.
35. Loss of services would push more people into car use, increasing congestion and emissions. Respondents also noted impacts on volunteering, community participation, and local cultural venues, which depend on accessible evening transport.

36. One third of respondents (34%) did not offer an opinion on the proposal to remove evening route subsidies. Among those who did, the majority disagreed with subsidy withdrawal, with strongest opposition from users, female respondents, and younger and middle-aged adults.

Sunday routes

37. 919 respondents identified as users of at least one of the affected Sunday routes.

Route 4: Poole – Broadstone – Merley – Wimborne (324 respondents)

Route 8 & 9: Poole - Hamworthy - Turlin Moor- Upton - Creekmoor – Poole (283 respondents)

Route 16: Poole - Bourne Estate – Bournemouth (191 respondents)

Route 25 & 26: Poole - Canford Heath - Tower Park (283 respondents)

Route X6: Poole - Bearwood (– Ringwood) (172 respondents)

38. Most Sunday route users are over 65, female, and/or living with disabilities. While many users have older persons' bus passes, a significant number of users travel without concessionary passes, reflecting a mix of pensioners, working-aged people, and families.
39. The most common reasons for travel are socialising, leisure, shopping, visiting family, attending church, and commuting to weekend employment.
40. Respondents consistently highlighted risks of increased isolation, loneliness, and poor mental health if Sunday buses were reduced or withdrawn. Many feared becoming housebound or losing contact with friends, family, and faith communities.
41. Withdrawal would restrict access to shops, leisure facilities, church, volunteering, and medical appointments. For many with mobility challenges, walking to distant alternative stops or using multiple connections was described as unfeasible.
42. Loss of Sunday services would jeopardise access to work, particularly weekend and evening shifts in retail, hospitality, and care. Alternatives such as taxis were considered unaffordable.
43. Reduced availability would force longer or more complex journeys, increase waiting times, and disrupt daily routines. Families also noted difficulties in meeting caring responsibilities.
44. Respondents warned that withdrawal would increase car dependency, congestion, and emissions. Community and cultural activities reliant on accessible transport would also be negatively affected.

One third of respondents (32%) did not offer an opinion on the proposal to remove Sunday route subsidies. Of those who did, most disagreed with subsidy withdrawal, with opposition particularly strong among users, female respondents, and those aged younger than 65.

Monday to Saturday (daytime) routes

45. 2,589 respondents indicated that they use at least one of the Monday - Saturday routes.

Route One: Poole Bus Station - Hospital - Rail Station - Quay - Baiter Park (742 respondents)

Route 7A/B/C: Alderney East / Bloxworth Estate / Tower Park - Upper Parkstone (250 respondents)

Route 10: Poole - Sterte - Wessex Gate - Lytchett Matravers (319 respondents)

Route 18: Broadstone (West Way) - Canford Heath – Bournemouth (574 respondents)
Route 20: Poole – Penn Hill - Bournemouth – Castlepoint (489 respondents)
Route 32: Poole – Broadstone - Merley – Slades Farm – Bournemouth (238 respondents)
Route 33: Bournemouth – East Cliff - Bournemouth Hospital – Christchurch (447 respondents)
Route 36: Talbot View – Bournemouth – Kinson (527 respondents)

46. Most weekday route users are over 65, female, and/or living with disabilities. A high proportion hold older persons or disabled bus passes, underlining the accessibility and equity role of these services.
47. Core purposes include shopping for essentials, attending medical appointments, meeting friends, leisure, caring responsibilities, and connecting to other bus services. Many passengers rely on these buses multiple times per week, with significant proportions travelling daily.
48. Respondents expressed concern that reductions or withdrawal would lead to isolation, reduced independence, and poorer mental health, particularly for elderly and disabled residents. Many described the bus as a lifeline.
49. Most users have no alternative means of transport. Withdrawal would prevent many from attending hospital appointments, shopping for essentials, or maintaining family and community connections.
50. Many users would face significant additional costs from taxis or car use, which they described as unaffordable. Some anticipated impacts on their ability to reach work, leading to potential loss of employment.
51. Reduced services would increase travel times, create overcrowding on other routes, and force difficult journey planning, particularly for those with mobility issues.
52. Withdrawal is expected to increase car dependency, traffic congestion, and emissions, undermining environmental efforts. Respondents also noted negative impacts on volunteering and caring responsibilities.
53. Most respondents (93%) expressed an opinion on the proposal to remove Monday–Saturday daytime route subsidies, with most strongly disagreeing with subsidy removal. Opposition was consistent across demographics, with route users particularly opposed.

School routes

54. 140 respondents identified as users of at least one of the affected school routes.

School routes funded from Children's Services Budget:

Route 40: Hamworthy - Turlin Moor - Upton - St Edward's & St Mary's Schools (57 respondents)
Route 425: Wallisdown - Bearwood - Merley - Corfe Hills & Broadstone Middle Schools (43 respondents)

School routes funded from Bus Subsidy budget:

Route 46: Throop - Avonbourne Academies (5 respondents)
Route 81: Charminster - Avonbourne Academies (8 respondents)
Route 448: Old Town - Hamworthy - Parkstone & Poole Grammar Schools (37 respondents)
Route 744: Baiter - Old Town - Oakdale Junior School (18 respondents)

55. Most respondents rely on these services daily, highlighting their importance for routine and reliable school attendance.
56. If bus subsidies were withdrawn, respondents reported they would be forced to rely on driving, lifts from friends and family, taxis, or complex multi-bus journeys. Some indicated their children would be unable to reach school at all. Many children would face longer, more complicated, or unsafe journeys. For some, particularly those with additional needs, the bus is their only viable means of travel.
57. Families anticipate increased costs from fuel, taxis, and lost working hours, with several suggesting the change could jeopardise their employment. Parents with children in different schools described unmanageable schedules if bus routes are withdrawn. Respondents noted environmental impacts from increased car use and higher congestion. Respondents were also concerned over their children's independence and safety.
58. More than a third of respondents (37%) did not offer an opinion on the proposal to remove school route subsidies. Of those who did, the majority disagreed with the withdrawal of subsidies, with strongest opposition from current users, residents, female respondents, and those aged 16–64.

General Consultees Comments

59. Respondents were asked to provide their reasons for their agreement/disagreement. Respondents feared increased isolation, loss of independence, reduced ability to socialise, and negative mental health impacts. Buses were repeatedly described as a lifeline, particularly for older and disabled residents.
60. Respondents emphasised that buses are often their only viable transport option. Cuts would limit access to shops, healthcare, education, work, and social activities. Concerns about safety, distance to alternative stops, and already limited provision were common.
61. Respondents anticipated longer, more complex journeys, reliance on multiple buses, and increased strain on already crowded services.
62. Respondents stressed that buses are the most affordable option. Alternatives such as taxis were unaffordable, and many feared losing employment, particularly shift and weekend work. Some also highlighted that they had chosen homes based on bus access.
63. Respondents noted that subsidy removal would undermine environmental aims, increase congestion, and hinder volunteering and caring responsibilities. Some felt it would erode trust in the council.
64. Respondents feared children would lose access to education, particularly those in rural areas or from low-income families. Some argued pupils should attend local schools, but the dominant view was that removing subsidies would disadvantage children unfairly.
65. A smaller number of respondents supported subsidy withdrawal, arguing that public funds should not support services not used by everyone, or that bus users should bear the cost. Some felt alternative travel options were available.
66. Many respondents proposed alternatives to complete withdrawal, including reducing frequency, introducing smaller buses, diverting existing high-frequency routes, or restructuring services into circular/linked loops. These suggestions were framed as ways to reduce costs while avoiding leaving communities without any service.

Existing Network Performance Analysis

67. **Appendix 3** contains a schedule of the existing services, including the route description, frequency, cost, number of passengers (annual and daily average), cost per passenger trip and consultation outputs.
68. The performance review identified that the evening routes (5 services) and the Sunday routes (5 services) have, on average, the lowest subsidy with the average being £1.22 (range £0.23 to £2.79) per passenger trip.
69. That the Monday to Saturday (daytime) services have a support per passenger trip cost average of £1.35 (range £0.46 to £2.66). This level of support is considered relatively low for a subsidised bus service, suggesting good value for money. There are high numbers of older people using these routes, mainly travelling with concessionary bus passes. It should be noted that concessionary bus travel is a statutory provision and is a subsidy to the passenger and not the bus operator.
70. The school routes (6 services) were found to be the most expensive to operate with an average cost per passenger trip of £4.69 (range £1.37 to £8.28).
- Note: that one of the routes, Route 40, is currently being operated on a temporary basis until the end of the Summer Term 2026 due to the contract being terminated by the previous operator and a new provider procured. This change has resulted in a price increase equating to more than £9k per annum to maintain the service resulting in the cost of subsidy per passenger trip of £8.28.
71. The price that parents pay for their children to utilise the services also varies from route to route. The table 1 below schedules the price of a return trip using each of the respective school routes:

Table 1 – Passenger fares for using subsidised school routes

Bus Route	Price per term [£]	Daily price for a return trip [£]	Notes
46	£247.50	£4.58	-
81	£247.50	£4.58	-
448	£257.40	£4.77	-
744	n/a	£3.40	Zone A bus network period tickets accepted on this service
40	n/a	£2.40	-
425	£212.90	£3.94	-

Note: the price of unlimited travel on the BCP bus network using commercial services when purchased via the morebus app on a weekly basis is £16.70 so if used across 5 days the average price of a return journey is £3.34. If purchased monthly (30-day pass) at a cost of £64.00 this reduces the average cost of a return journey to £3.20 (assuming 20 days travel to/from school). This cost is reduced even further if a 90-day pass is purchased at a price of £165.00 with the average cost of a return journey being £2.75 (assuming 60 days travel to/from school).

For some students using service 425, which travels into Dorset, students using the commercial alternative would require a Zone AB bus network ticket. When purchased via the morebus app on a weekly basis the price is £20.50, so if used across 5 days the average price of a return journey would be £4.10. A 30-day pass costs £73.00 reducing the average cost of a return journey to £3.65 (assuming 20 days travel to/from school). A 90-day pass costs £188.00 making the average cost of a return journey £3.13 (assuming 60 days travel to/from school).

Revised Subsidised Bus Service Network Proposal

72. Using the performance analysis alongside the consultation feedback and informed by dialogue with the DfT, a revised subsidised bus service network proposal has been developed through partnership working with the local bus operator, it is set out in **Appendix 4** and comprises the following:
73. The 10 evening and weekend supported services to become commercial (operated without subsidy) following increases in patronage. There would be changes to some of the routes and/or timetables though these would be expected to maintain a similar level of service to the current provision.
74. This would secure the evening and Sunday services to the key suburbs across the conurbation and is testament to the positive benefit of partnership working, the council's delivery of high-quality waiting facilities, Real Time Passenger Information, CCTV, the priming of routes with Bus Service Improvement Plan (BSIP) funded fares initiatives, and bus priority measures, being matched by morebus' significant investment in new vehicles, driver training and smart ticketing.
75. 3 of the 8 Monday to Saturday daytime services would be adjusted and combined with other services to create new routes. The results of the consultation, together with analysis of Electronic Ticket Machine (ETM) boarding data, has been used to form these proposals. New peak hour services would be introduced, and cross-conurbation links (including to Bournemouth Hospital) would be provided. Some of the services could be enhanced, further utilising additional LABG to prime them and are designed with longer term commerciality in mind.
76. 5 of the 8 Monday to Saturday daytime services would remain in their current form. These routes are considered the most socially necessary and have a low subsidy per passenger journey but are not currently fully commercial. The existing timetables are seen to be efficient and optimised.
77. 4 of the 6 school services are not considered sustainable in their current form because of a combination of the following: they require high or very high subsidy per passenger journey; there is a suitable alternative service and/or there are very low passenger numbers. Therefore, the following is recommended:
 - a. Subsidised School Service Route 40 is recommended to be discontinued at the end of the 2025/26 academic year because the cost per passenger journey is high, there are very few passengers, and a suitable alternative commercial service exists.
 - b. Subsidised School Service Route 425 is recommended to be discontinued at the end of 2026/27 academic year because the cost per passenger journey is high and there are suitable alternative commercial services. The rationale for retaining this for a year longer than Route 40 is that the alternative journey is more complex with a change of bus, hence, delaying the withdrawal affords parents more time to plan for the change.

- c. Subsidised School Service Routes 81 is recommended to be discontinued owing to the high cost per passenger albeit this shall be mitigated by being combined with the 46 service which shall reduce the level of subsidy required to cover the area representing better value for money.
78. Routes 744 and 448 are recommended to be retained in their existing form as the existing timetables are considered efficient and optimised.
79. The council has introduced child period tickets for the first time this year using Bus Grant funding which would help students potentially transferring from dedicated school buses to network services. It has also invested millions in walking and cycling infrastructure making active travel (walking/wheeling) journeys much safer and convenient compared to when the services were originally conceived.

Options Appraisal

80. The following options have been considered when reviewing the subsidised bus network.

81. Option 1 - no changes to existing subsidised bus service network.

This would result in no reductions in service provision in the short term and therefore no immediate impact on passengers. However, in the medium term (from April 2027 onwards) unless the council bus subsidy budget is significantly increased (not currently viable due to ongoing financial pressure) then there would be a need to review all services again and make cuts because many of the services shall need to be retendered which will result in increased costs (more than £500k) – the council cannot afford to increase bus subsidy budgets.

Furthermore, the review has demonstrated that several of the services are commercially viable and that other services do not represent good value for money, hence, if the services are not adjusted then the council would be unable to justify the use of Local Area Bus Grant (LABG) to operate the services. This option is therefore not considered sustainable in the medium/long term and is **not recommended**.

82. Option 2 – Changes to the Evening/Sunday services to enable them to be operated commercially and some daytime Monday to Saturday services and all School Services retained in their current form.

The service provision would be as per **Appendix 4**, but with all the school services retained in their existing form. In consideration of the performance review, whilst the proposals for adjusting the Evening/Sunday Services and the Monday to Saturday daytime services demonstrate best value and use of the LABG to support them is justifiable, some of the school services by comparison are very expensive to operate (Routes 40 and 425 specifically) resulting in poor value for money and there are suitable alternative options via the commercial network (**refer to Appendix 5**).

The LABG has been awarded to the council to improve and grow bus services and not to support services that are not good value for money or not essential. The costs of operating Routes 40 and 425 are set to substantially increase in future years because both services need to be retendered soon (the 40 now and 425 in August 2027) which will result in increased costs (expected to be nearly double) making them even less sustainable.

Using LABG to operate services that largely duplicate the commercial network and that have limited patronage making them very expensive to operate, is not

considered to be the best use of public money, hence, this option is **not recommended**.

83. Option 3 – withdrawal council derived subsidy for bus services and utilise Local Authority Bus Grant to fund a revised subsidised bus network

The service provision would be as set out in **Appendix 4**, which has been developed in full consideration of the consultation and performance review outputs and is considered to represent the best value for money and as such is suitable to be LABG funded with the exception of the 40 and 425 routes which are not good value for money and therefore recommended to cease in a phased manner (they shall continue to be funded by Children's Services until they finish operating).

The council has reviewed the impact on parents and children that use the existing school services to consider the impacts they ceased to operate. Potential suitable options either via the commercially operated bus network or active travel for some or part of the journeys are set out in **Appendix 5**.

The proposed revised network is affordable (utilising the LABG), and some elements could potentially become commercial in the future. This option is considered sustainable in the medium/long term, it is therefore **recommended**.

- 84. Bus timetables across BCP are adjusted for the summer and winter seasons. To minimise disruption to passengers, it is proposed that if any changes to Monday to Saturday daytime, evening and Sunday are approved that they would dovetail with the morebus summer 2026 timetable effective from 24 May 2026.i.e., no services would change until 24 May 2026 and bus subsidy would need to be utilised during 2026/27 financial year to cover the period 1 April to 24 May 2026.
- 85. The variation, or termination of local bus service contracts requires 16 weeks' notice. Morebus has agreed to reduce the notice period to 12 weeks meaning that all the options set out below are deliverable ahead of the 24 May 2026 timetable change date.
- 86. School services would not be withdrawn part-way through the academic year. If the decision is made to withdraw the subsidy to Route 40 it would continue to be operated until the end of the 2025/26 academic year (20 July 2026).
- 87. If the decision is made to withdraw the subsidy to Route 425 it would continue to be operated until the end of the 2026/27 academic year.
- 88. If the decision is made to combine the 46 and 81 they would continue to be operated in current form until the end of the 2025/26 academic year (20 July 2026) funded using bus subsidy and in advance of September 2026 a new timetable would be published for a revised 46 covering both the 46 and required parts of the 81 service that would be funded into the future utilising LABG.

Summary of financial implications

- 89. Refer to options 1 to 3 set out above.
- 90. There would be a substantial increase in financial pressure on the council to maintain the existing services in their current form in 2026/27 and beyond. These services have been in-effect maintained (funded) whilst the bus subsidy review has been undertaken by utilising one off BSIP+ grant to top up, council derived bus subsidy grant and BSOG.

There is no more BSIP+ funding available and BSOG is now incorporated into the LABG settlement. By 2027/28 the cost of providing the subsidised network is estimated to increase from £1.59m to over £2m due to the retendering of existing long-term contracts for services that expire in April 2027 and that are currently being operated on a temporary contract. This is not considered sustainable.

91. Option 3 is sustainable. It can be funded into the future utilising BCP LABG revenue allocation. It is estimated that in 2026/27 financial year £138k of council bus subsidy revenue budget would be used to subsidise the existing services until the respective May timetable changes and end of the school year.

£53k of the £138k would be funded from Children's Services to subsidise Route 40 to the end of the 2026 summer term and to provide the 425 during the 2026/27 financial year. £13k would also be required in 2027/28 financial year from the Children's Services budget to operate the service until the end of the 2027 summer term.

92. On 5 December 2025 DfT published LABG revenue allocations and the council has been allocated £2,621,127 for 2026/27 and the same amount annually through to 2028/29 financial year. This indicates that the recommended proposal would be sustainable until at least end of March 2029. There is no indication that beyond 2028/29 that this annual commitment would cease.

Summary of legal implications

93. Local Transport Authorities (LTAs) have a duty to assess the transport needs of its area and the impact of bus services being withdrawn, on the elderly, disabled, and people with mobility problems. The council, as the LTA, must not decide on the budget cut, and then simply find several bus services that if cut would save them that amount. This review has included a full assessment of how changes to subsidised routes would impact on passengers. The consultation undertaken as part of the review did not predetermine the outcome and sufficient time was allocated to ensure full consideration of the outcome.
94. A reduced timescale has been agreed with morebus for any contract variations or terminations resulting from this review.
95. Local authorities must provide free home-to-school transport for eligible children, but they are not required to run a full public bus network; instead, they arrange suitable transport (like contracted school buses, taxis, or public bus passes) to meet specific needs, for those living beyond walking distance or with special needs/disabilities, focusing on safe, stress-free access to education. The duty under the Education Act 1996 is to ensure access, not necessarily a general public service, using commissioned services or public transport where appropriate.

Summary of human resources implications

96. No significant human resources implications have been identified. There is potential that some BCP Council employees could be affected by any reductions in bus services, either directly or indirectly.

Summary of sustainability impact

97. A Decision Impact Assessment DIA Proposal ID 741 has been created for this decision, and the impact summary is set out below. Major negative impacts were identified for the Transport and Accessibility category; however, these would be

largely mitigated should Option 3 be adopted. No positive or negative impacts were identified for Water and Resource use or Sustainable Procurement.

98. Concern was raised from the Natural Environment perspective that reductions in bus services do not affect the opportunity for people to travel to green spaces, highlighting that green spaces offer huge benefits for health and wellbeing, community cohesion, volunteering and environmental engagement.
99. The remaining categories identified minor negative impacts, or the impacts were unknown. The overall impact is considered **Moderate**.

Impact Summary



Climate Change & Energy	Amber - Minor negative impacts identified / unknown impacts	
Communities & Culture	Amber - Minor negative impacts identified / unknown impacts	
Waste & Resource Use	No positive or negative impacts identified	
Economy	Amber - Minor negative impacts identified / unknown impacts	
Health & Wellbeing	Amber - Minor negative impacts identified / unknown impacts	
Learning & Skills	Amber - Minor negative impacts identified / unknown impacts	
Natural Environment	Amber - Minor negative impacts identified / unknown impacts	
Sustainable Procurement	No positive or negative impacts identified	
Transport & Accessibility	Red - Major negative impacts identified	

Answers provided indicate that the score for the carbon footprint of the proposal is: 7.5

Answers provided indicate that the carbon footprint of the proposal is:	Moderate	
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Summary of public health implications

100. A decision by Council to reduce or withdraw subsidised local bus services is likely to have varying public health implications.
101. A change that encourages those that can do so to walk to a bus stop further away from their usual stop is likely to have positive health benefits. Also, bus passengers switching to cycling for some or all their bus journeys are also likely to have a positive benefit.
102. However, bus journeys that are replaced by car journeys (non-EV) will have a negative effect. Diesel cars are the single biggest contributor to NOx levels, responsible for 41% of all NOx emissions from road transport, impacting on air quality and public health.
103. Bus passengers that do not have alternative modes of travel are likely to make fewer journeys or not travel at all. This is likely to have a negative effect on both physical and mental health.
104. The Revised Subsidised Bus Service Network Proposal and offer of help to plan alternative ways to travel aims to minimise public health implications.

Summary of equality implications

105. An EIA conversation/screening document has been completed for this decision and is attached at **Appendix 6**.

The profile of people that use buses, from both national and local evidence, are groups the Equality Act is intended to benefit by advancing equality of opportunity between people who share a protected characteristic and those who do not. Much older, much younger age groups, people with a disability, women, other ethnic groups, other religions, other sexual orientations and residents from more deprived areas are all more likely to use buses, compared to others in their protected groups.

Any deterioration in service following a decision to reduce or withdraw subsidised bus routes will disproportionately impact on these groups unless adequate mitigation actions can be put in place.

Negotiations with Morebus have resulted in their agreement to operate the evening and Sunday routes on a commercial basis and minimum impact on passengers is expected. In addition, the authorisation from the DfT to use Bus Grant revenue allocation (subject to conditions) will significantly reduce the impact on most passengers.

Alternative journeys for school children currently using the two dedicated school buses proposed for withdrawal and transferring to the general bus network have been investigated. This has concluded that there are options available, albeit involving a change of bus and/or a longer walk to/from the bus stop.

Summary of risk assessment

106. The main risks identified were ensuring that public consultation is undertaken and that the outputs used to understand the impacts to passengers (including children and young people) accessing essential services, employment and education if changes were made to subsidised services. Ensuring that statutory duties regarding public transport and access to education are met. And that sufficient information was/is provided to ensure that decision makers are fully informed of the impacts of recommended changes.

Background papers

None

Appendices

Appendix 1: Indicative route map of the existing subsidised bus network

Appendix 2: BCP Council Bus Subsidies Consultation 2025 Report (Summary)

Appendix 3: Performance Review of the existing subsidised bus network

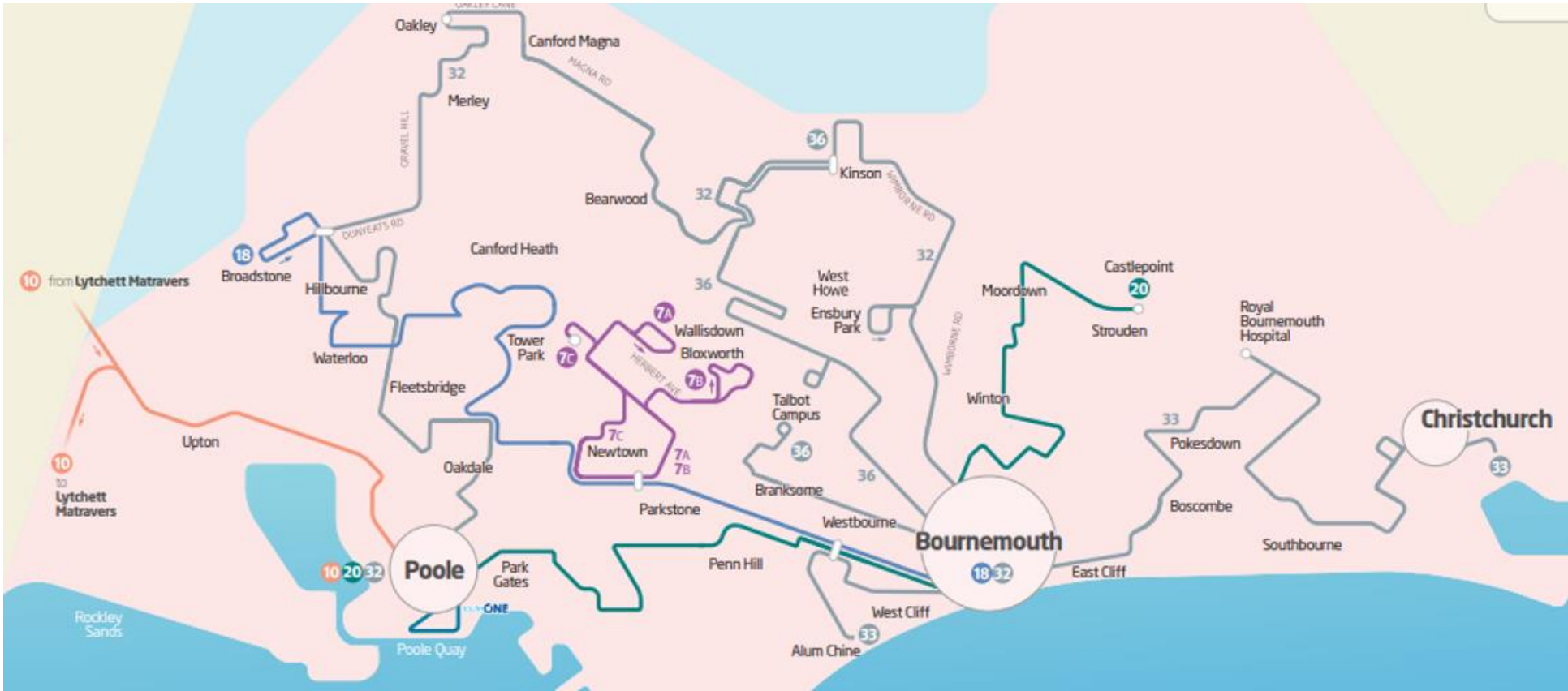
Appendix 4: Subsidised Bus Service Network Proposal (Option 3)

Appendix 5: Alternative journey choices examples

Appendix 6: Equalities Impact Assessment Conversation/Screening

Appendix 1: Indicative route map of the existing subsidised bus network

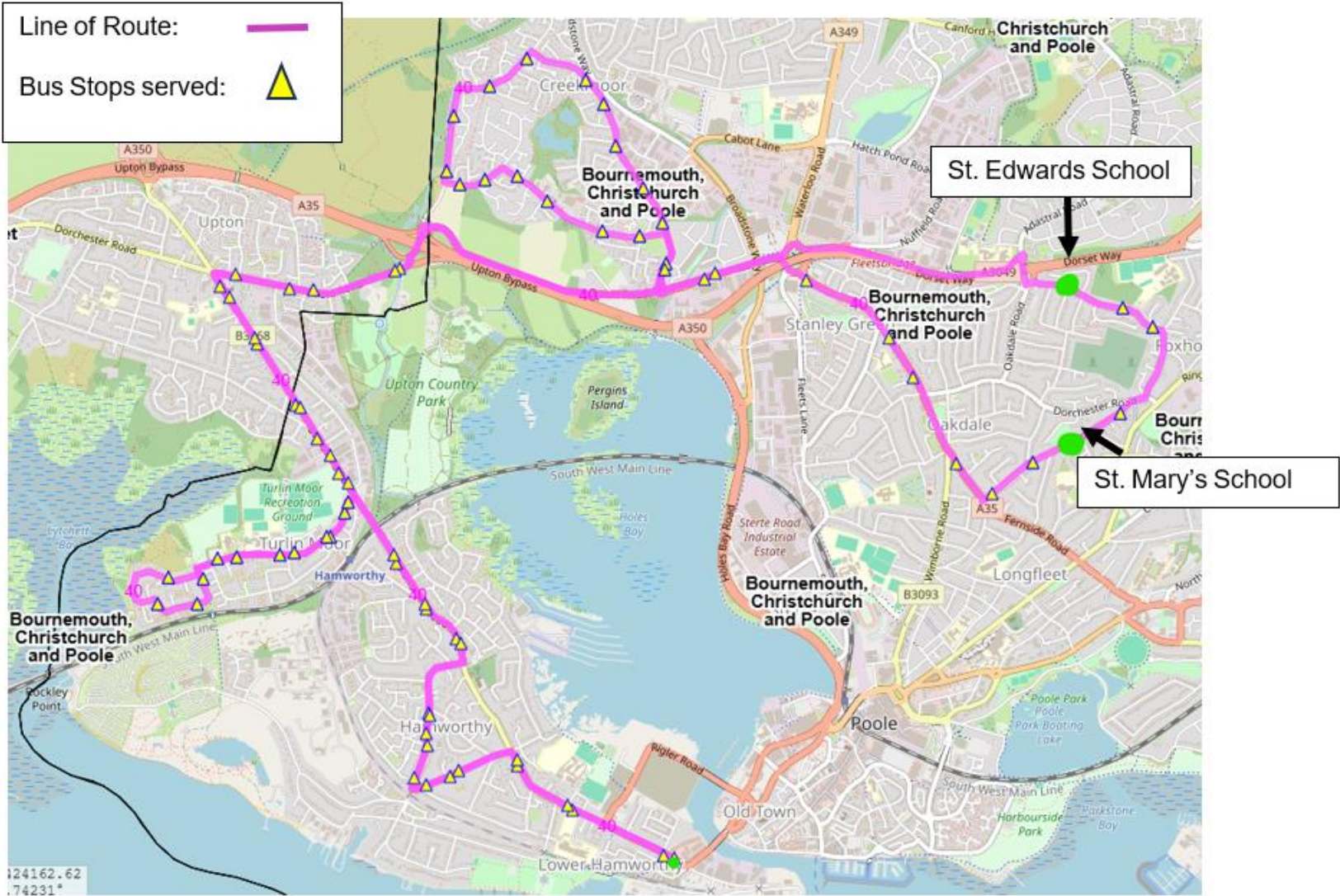
Infographic showing subsidised daytime Monday to Saturday routes (excluding school routes)

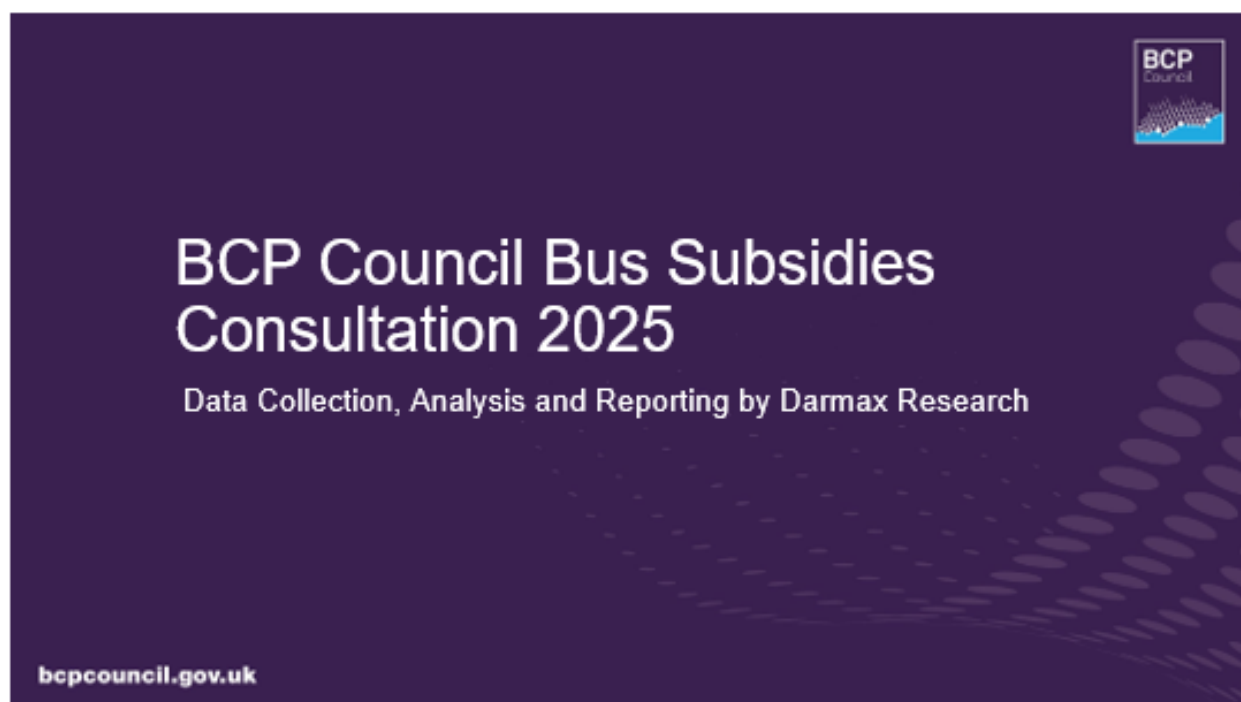


Infographic showing subsidised school bus service routes provided by morebus



Indicative route map showing subsidised school service 40 operated by Linkrider





Introduction



- BCP Council are undertaking a review of subsidised bus services to confirm whether council subsidies are still needed to provide services and to see if viable alternatives exist. The council supports 24 local bus service contracts, consisting of school services (n=6), Monday - Saturday routes (n=8), evening routes (n=5) and Sunday routes (n=5)
- This consultation will inform decision making on which routes the council continue to subsidise
- A survey was designed to collect evidence on the use of subsidised bus services, views and suggestions on the proposals and what users would do if the routes were reduced in frequency or withdrawn
- Paper versions of the survey were made available on buses and in all of BCP Council's libraries. Respondents could also provide their views by completing the survey online
- A total of 2,989 survey responses were received
- Fieldwork took place between 7th July and 18th August 2025
- The council commissioned Darmax Research to undertake the data collection, analysis and reporting of survey results

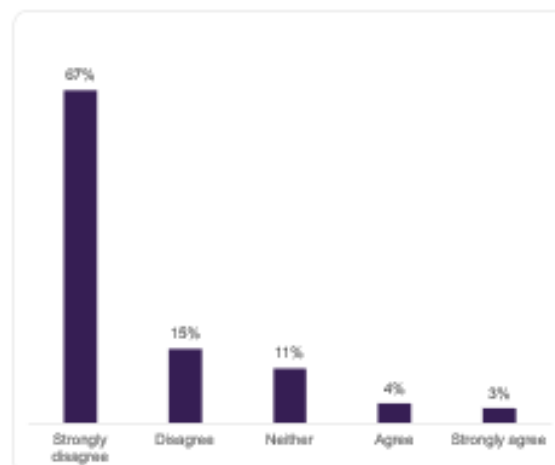
School routes



The majority of respondents disagreed with the proposal to withdraw subsidies on school routes.

Respondents who were significantly most likely to strongly disagree with the proposal to remove the subsidy for school routes were:

- Respondents who use one of the school routes
- Bournemouth, Poole and Dorset residents
- Female respondents
- Those aged 16-64 years



Route 40: Hamworthy - Turlin Moor - Upton - St Edward's & St Mary's Schools



57 respondents indicated that they or their child(ren) use the school route 40.

More than half of the respondents who use the school route 40 do so on a daily basis (57%), while the majority of the other users do so either 2-4 times a week (17%) or weekly (11%).

33% of those who use the school route 40 would have to rely on friends / family to get them or their child to school if the route was withdrawn, while 33% would have to drive. Respondents also indicated that they / their child would walk (17%), use a bus on a different route (15%) or use a taxi (13%).

Some respondents indicated their child(ren) would be unable to reach school at all.

Respondents commented that withdrawing this school route would put additional stress on parents and mean that they would be late to work, impacting the hours that they could work and risk losing their job. These respondents also commented that it would cost them more money to get their child(ren) to school by other means.

Parents with children in different schools described unmanageable schedules if bus routes are withdrawn.



Route 46: Throop - Avonbourne Academies

5 respondents indicated that they or their child(ren) use the school route 46.

4 of these respondents use route 46 on a daily basis.

Respondents would have to drive, rely on friends / family to get them or their child to school, use a taxi or use a bus on a different route if route 46 was withdrawn.

Respondents commented that they have to get to work at the same time that school starts and withdrawing this school route would mean that they would be late to work, impacting the hours that they could work and risk losing their job.

Respondents also commented that it would cost them more money to get their child(ren) to school by other means and that their child would be more tired by travelling to school by alternative means.



Route 81: Charminster - Avonbourne Academies

8 respondents indicated that they or their child(ren) use the school route 81.

4 of these respondents use route 81 on a daily basis, while the other 4 use it either weekly or 2-4 times a week.

Respondents would have to drive, rely on friends / family to get them or their child to school, use a taxi or use a bus on a different route if route 46 was withdrawn.

Respondents commented that they have to get to work at the same time that school starts and withdrawing this school route would mean that they would be late to work, impacting the hours that they could work and risk losing their job.

Respondents also commented that it would cost them more money to get their child(ren) to school by other means or they would be forced to drive, increasing congestion and their environmental impact.

Some respondents commented that it would cause their child to be late to school, or would be unable to get to school at all.





Route 425: Wallisdown - Corfe Hills & Broadstone Middle Schools

43 respondents indicated that they or their child(ren) use the school route 425.

67% of respondents who use the school route 425 do so on a daily basis, while the other users do so either 2-4 times a week (14%) or weekly (19%).

37% of those who use the school route 425 would have to rely on friends / family to get them or their child to school if the route was withdrawn, while 33% would have to drive.

Respondents indicated their child(ren) would be late or unable to reach school at all if this route was withdrawn. Respondents also commented that they are unable to drive and this route is the only way their child can get to school.

Other respondents commented that it would mean that they would be late to work, impact the hours that they could work and risk losing their job. These respondents also commented that it would cost them more money to get their child(ren) to school by other means.

Parents with children in different schools described unmanageable schedules if bus routes are withdrawn, while the route is vitally important for children with a disability.



Route 448: Old Town - Hamworthy - Parkstone & Poole Grammar Schools

37 respondents indicated that they or their child(ren) use the school route 448.

67% of respondents who use the school route 448 do so on a daily basis, while the majority of other users do so either 2-4 times a week (11%) or weekly (14%).

52% of those who use the school route 448 would have to rely on friends / family to get them or their child to school if the route was withdrawn, while 30% would have to drive. Respondents also indicated that they / their child would walk (18%), cycle (15%) or use a taxi (15%).

Respondents indicated their child(ren) would be late or unable to reach school at all if this route was withdrawn. Respondents also commented that they are unable to drive and this route is the only way their child can get to school. It is too far to walk to school and parents are concerned for their child's safety if they had to cycle.

Other respondents commented that it would mean that they would be late to work, impact the hours that they could work and risk losing their job. These respondents also commented that it would cost them more money to get their child(ren) to school by other means.

Parents with children in different schools would struggle if bus routes are withdrawn.



Route 744: Baiter - Old Town - Oakdale Junior School

18 respondents indicated that they or their child(ren) use the school route 744.

78% of respondents who use the school route 744 do so on a daily basis.

47% of those who use the school route 744 would have to rely on friends / family to get them or their child to school if the route was withdrawn, while 41% would walk. Other respondents would use a taxi (18%) or a bus on a different route (12%).

Respondents indicated their child(ren) would be late or unable to reach school at all if this route was withdrawn. Respondents also commented that it is too far to walk to school and parents would be concerned for their child's safety.

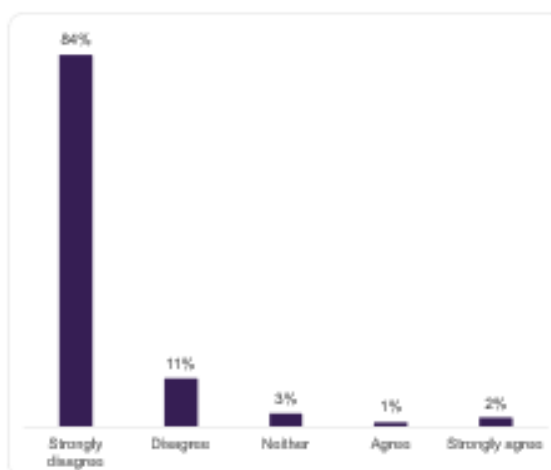
Other respondents commented that it would mean that they would be late to work, impact the hours that they could work and risk losing their job. These respondents also commented that it would cost them more money to get their child(ren) to school by other means.

Parents with children in different schools would struggle if bus routes are withdrawn.

Monday - Saturday routes

The vast majority of respondents disagreed with the proposal to withdraw subsidies on Monday - Saturday routes.

Respondents who were significantly most likely to strongly disagree with the proposal to remove the subsidy for Monday - Saturday routes were those who use one of the routes



Route One: Poole Bus Station - Hospital - Rail Station - Quay - Baiter Park



742 respondents indicated that they use Route One on Monday - Saturday.

The vast majority of Route One users live in Poole (87%) and are older than 65 years of age (80%). 67% of respondents who use Route One are female, while 70% have a disability. The majority of users have an older persons bus pass (76%).

80% of users travel on this route at least once a week.

The most common reasons for travelling on Route One are shopping for food, shopping for other items, social/meeting friends, medical reasons and for leisure purposes.

Respondents travel on Route One because it is too far/difficult to walk and they don't have the option of travelling by other means. In addition, users of this route do so because they have a disability and it is both better for the environment and more convenient than the car.

Respondents would not go anymore (35%), don't know what they would do (29%) or would travel at a different time (28%) if the route was reduced in frequency.

Respondents would not go anymore (44%) or don't know what they would do (32%) if the route was withdrawn.

Respondents expressed concern that they have no alternative means of transport. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation and poorer mental health, particularly for elderly and disabled residents.

Many users would face significant additional and unaffordable costs from taxis or car use. Some anticipated impacts on their ability to reach work, leading to potential loss of employment. Withdrawal is expected to increase traffic congestion and emissions, undermining environmental efforts. Respondents also noted negative impacts on volunteering and caring responsibilities.

Route 7A/B/C: Alderney East / Bloxworth Estate / Tower Park - Upper Parkstone



250 respondents indicated that they use Route 7A/B/C on Monday - Saturday.

The vast majority of Route 7A/B/C users live in Poole (96%) and are older than 65 years of age (76%). 68% of respondents who use Route 7A/B/C are female, while 67% have a disability. The majority of users have an older persons bus pass (68%).

92% of users travel on this route at least once a week.

The most common reasons for travelling on Route 7A/B/C are shopping for food, shopping for other items, social/meeting friends, medical reasons and for leisure purposes.

Respondents travel on Route 7A/B/C because it is too far/difficult to walk and they don't have the option of travelling by other means.

Respondents would not go anymore (45%) or don't know what they would do (33%) if the route was reduced in frequency.

Respondents would not go anymore (55%) or don't know what they would do (33%) if the route was withdrawn.

Respondents expressed concern that they have no alternative means of transport. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health, particularly for elderly and disabled residents.

Many users would face significant additional and unaffordable costs from taxis or car use. Some anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 10: Poole - Sterte - Wessex Gate - Lytchett Matravers



319 respondents indicated that they use Route 10 on Monday - Saturday.

64% of Route 10 users live in Dorset, while 32% live in Poole. 65% of users are older than 65 years of age. 72% of respondents who use Route 10 are female, while 49% have a disability. 33% of users do not have an older persons bus pass or a disabled persons bus pass.

80% of users travel on this route at least once a week.

The most common reasons for travelling on Route 10 are shopping for other items, social/meeting friends, shopping for food, leisure purposes and for medical reasons.

Respondents travel on Route 10 because it is too far/difficult to walk, they don't have the option of travelling by other means and it is more convenient, cheaper and better for the environment than the car.

Respondents would not go anymore (37%) or don't know what they would do (32%) if the route was reduced in frequency. 21% would drive, rely on friends / family or travel at a different time.

Respondents would not go anymore (46%) or don't know what they would do (34%) if the route was withdrawn. 19% would drive and 20% would rely on friends / family.

Respondents expressed concern that they have no alternative means of transport and it is too far/difficult to walk to alternative bus stops. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 18: Broadstone (West Way) - Canford Heath - Bournemouth



574 respondents indicated that they use Route 18 on Monday - Saturday.

The majority of Route 18 users live in Poole (84%), while just less than three quarters of users are older than 65 years of age (72%). Two thirds of respondents who use Route 18 are female (67%), while more than half have a disability (56%). Two thirds of users (65%) have an older persons bus pass.

83% of users travel on this route at least once a week.

The most common reasons for travelling on Route 18 are shopping for food, social/meeting friends, shopping for other items, leisure purposes and for medical reasons.

Respondents travel on Route 18 because it is too far/difficult to walk, they don't have the option of travelling by other means, they have a disability and it is more convenient, cheaper and better for the environment than the car.

Respondents would not go anymore (33%) or don't know what they would do (26%) if the route was reduced in frequency. 27% would use a bus on a different route, 24% would travel at a different time, 17% would rely on friends / family and 15% would drive.

Respondents would not go anymore (40%) or don't know what they would do (27%) if the route was withdrawn. 28% would use a bus on a different route.

Respondents expressed concern that they have no alternative means of transport and it is too far/difficult to walk to alternative bus stops. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment. Some warned that it would increase congestion and emissions, while others commented that it would impact on their ability to undertake volunteering and/or help with caring responsibilities.

Route 20: Poole - Penn Hill - Bournemouth - Castlepoint



489 respondents indicated that they use Route 20 on Monday - Saturday.

Two thirds of Route 20 users live in Poole (66%), while one third live in Bournemouth (32%). The majority of users are older than 65 years of age (82%). Two thirds of respondents who use Route 20 are female (66%), while more than half have a disability (60%). More than three quarters of users (78%) have an older persons bus pass.

86% of users travel on this route at least once a week.

The most common reasons for travelling on Route 20 are shopping for other items, shopping for food, social/meeting friends, leisure purposes and for medical reasons.

Respondents travel on Route 20 because it is too far/difficult to walk, they don't have the option of travelling by other means, they have a disability and it is more convenient, cheaper and better for the environment than the car and other means of transport.

Respondents would not go anymore (36%) or don't know what they would do (27%) if the route was reduced in frequency. 28% would travel at a different time and 25% would use a bus on a different route.

Respondents would not go anymore (40%) or don't know what they would do (29%) if the route was withdrawn. 26% would use a bus on a different route.

Respondents expressed concern that they have no alternative means of transport and it is too far/difficult to walk to alternative bus stops. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment. Some warned that it would increase congestion and emissions, while others commented that it would impact on their ability to undertake volunteering and/or help with caring responsibilities.

Route 32: Poole - Broadstone - Merley - Slades Farm - Bournemouth



238 respondents indicated that they use Route 32 on Monday - Saturday.

Two thirds of Route 32 users live in Poole (68%), while just less than one third live in Bournemouth (29%). Three quarters of users are older than 65 years of age (77%). Two thirds of respondents who use Route 32 are female (65%), while two thirds have a disability (64%). Three quarters of users (73%) have an older persons bus pass.

84% of users travel on this route at least once a week.

The most common reasons for travelling on Route 32 are shopping for food, shopping for other items, social/meeting friends, medical reasons and for leisure purposes.

Respondents travel on Route 32 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient and better for the environment than the car.

Respondents would not go anymore (41%) or don't know what they would do (31%) if the route was reduced in frequency. 20% would rely on friends / family.

Respondents would not go anymore (42%) or don't know what they would do (32%) if the route was withdrawn. 20% would use a bus on a different route.

Respondents expressed concern that they have no alternative means of transport and it is too far/difficult to walk to alternative bus stops. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 33: Bournemouth - East Cliff - Bournemouth Hospital - Christchurch



447 respondents indicated that they use Route 33 on Monday - Saturday.

Just less than three quarters of Route 33 users live in Bournemouth (71%), while the remaining users are split between Poole (13%) and Christchurch (15%) residents. The majority of users are older than 65 years of age (83%). Just less than two thirds of respondents who use Route 33 are female (62%), while 59% have a disability. Three quarters of users (76%) have an older persons bus pass.

83% of users travel on this route at least once a week.

The most common reasons for travelling on Route 33 are medical reasons, shopping for food, shopping for other items, social/meeting friends and for leisure purposes.

Respondents travel on Route 33 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient and better for the environment than the car.

Respondents would not go anymore (28%) or don't know what they would do (28%) if the route was reduced in frequency. 27% would use a bus on a different route, 20% would rely on friends / family, 18% would travel at a different time or use a taxi. 16% would drive.

Respondents would not go anymore (32%) or don't know what they would do (39%) if the route was withdrawn. 31% would use a bus on a different route, 21% would rely on friends / family, 20% would travel at a different time and 17% would drive.

Respondents expressed concern that they have no alternative means of transport and it is too far/difficult to walk to alternative bus stops. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 36: Talbot View - Bournemouth - Kinson



527 respondents indicated that they use Route 36 on Monday - Saturday.

The majority of Route 36 users live in Bournemouth (81%), while the remaining users live in Poole (19%). Two thirds of users are older than 65 years of age (68%). More than half of respondents who use Route 36 are female (58%), while half have a disability. Two thirds of users (65%) have an older persons bus pass.

90% of users travel on this route at least once a week.

The most common reasons for travelling on Route 36 are shopping for other items, social/meeting friends, shopping for food, leisure purposes and for medical reasons.

Respondents travel on Route 36 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because it is more convenient, better for the environment and cheaper than the car and other means of transport.

Respondents would not go anymore (36%) or don't know what they would do (32%) if the route was reduced in frequency. 21% would use a bus on a different route.

Respondents would not go anymore (48%) or don't know what they would do (26%) if the route was withdrawn. 23% would use a bus on a different route.

Respondents expressed concern that they have no alternative means of transport and it is too far/difficult to walk to alternative bus stops. Withdrawal would prevent many from attending medical appointments, shopping for essentials, or maintaining family and community connections. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

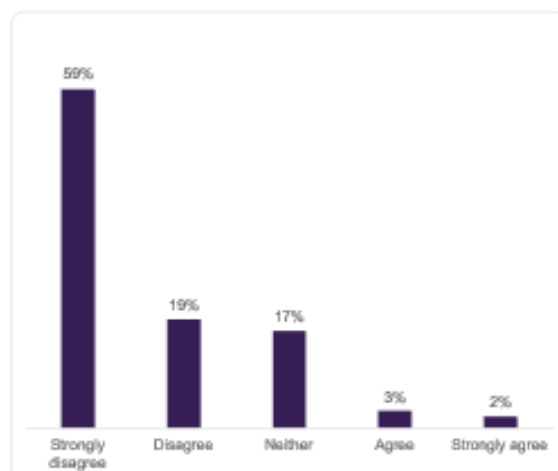
Evening routes



The majority of respondents disagreed with the proposal to withdraw subsidies on evening routes.

Respondents who were significantly most likely to strongly disagree with the proposal to remove the subsidy for evening routes were:

- Respondents who use one of the evening routes
- Bournemouth, Poole and Dorset residents
- Female respondents
- Those aged 16-24 years, as well as those aged 25-64



Route 4: Poole - Broadstone - Merley - Wimborne



301 respondents indicated that they use Route 4 in the evening.

The majority of Route 4 users live in Poole (87%), while two thirds of users are older than 65 years of age (65%). Just less than two thirds of respondents who use Route 4 are female (63%), while more than half have a disability (53%). 60% of users have an older persons bus pass.

55% of respondents who use Route 4 in the evening (after 6pm) use it at least once a week.

The most common reasons for travelling on Route 4 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items, shopping for food and medical reasons.

Respondents travel on Route 4 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because it is more convenient, better for the environment and cheaper than the car.

Respondents would not go anymore (39%) or don't know what they would do (26%) if the route was reduced in frequency. 38% would use a bus on a different route, 21% would travel at a different time and 20% would drive.

Respondents would not go anymore (53%) or don't know what they would do (20%) if the route was withdrawn. 20% would drive.

Respondents expressed concern that they have no alternative means of transport and it would make travelling in the evening much more difficult. Withdrawal would prevent many from attending evening social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 8 & 9: Poole - Hamworthy - Turlin Moor - Upton - Creekmoor - Poole



297 respondents indicated that they use Route 8 & 9 in the evening.

The majority of Route 8 & 9 users live in Poole (84%), while more than half of users are older than 65 years of age (57%). More than two thirds of respondents who use Route 8 & 9 are female (71%), while more than half have a disability (55%). While more than half of users have an older persons bus pass (53%), two fifths have no concessionary bus pass (39%).

68% of respondents who use Route 8 & 9 in the evening (after 6pm) use it at least once a week.

The most common reasons for travelling on Route 8 & 9 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for food, shopping for other items, medical reasons and for commuting to/from work. Respondents travel on Route 8 & 9 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient, better for the environment and cheaper than the car.

Respondents would not go anymore (46%) or don't know what they would do (27%) if the route was reduced in frequency. 39% would use a bus on a different route, 21% would rely on friends / family and 18% would travel at a different time.

Respondents would not go anymore (56%) or don't know what they would do (27%) if the route was withdrawn. 20% would rely on friends / family.

Respondents expressed concern that they have no alternative means of transport and it would make travelling in the evening much more difficult. Withdrawal would prevent many from attending evening social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 14: Poole - Bourne Estate – Wallisdown - Kinson



153 respondents indicated that they use Route 14 in the evening.

60% of Route 14 users live in Poole while 38% live in Bournemouth. Just less than half of users are older than 65 years of age (45%), while 44% are aged 25-64. 62% of respondents who use Route 14 are female, while more than half have a disability (61%). While 39% of users have an older persons bus pass, half have no concessionary bus pass (49%).

64% of respondents who use Route 14 in the evening (after 6pm) use it at least once a week.

The most common reasons for travelling on Route 14 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items, medical reasons, shopping for food and for commuting to/from work.

Respondents travel on Route 14 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient, better for the environment and cheaper than the car.

Respondents would not go anymore (35%) or don't know what they would do (33%) if the route was reduced in frequency. 53% would use a bus on a different route, 20% would rely on friends / family and 20% would travel at a different time.

Respondents would not go anymore (41%) or don't know what they would do (30%) if the route was withdrawn. 25% would use a bus on a different route, 20% would use a taxi and 18% would rely on friends / family.

Respondents expressed concern that they have no alternative means of transport and it would make travelling in the evening much more difficult. Withdrawal would prevent many from attending evening social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health. Respondents would also not be able to get to medical appointments or to shops.

Many users anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 16: Poole - Bourne Estate - Bournemouth



205 respondents indicated that they use Route 16 in the evening.

78% of Route 16 users live in Poole while 20% live in Bournemouth. Half of users are older than 65 years of age (51%), while 63% of respondents who use Route 16 are female. Half of Route 16 users have a disability (51%). While 45% of users have an older persons bus pass, 48% have no concessionary bus pass.

69% of respondents who use Route 16 in the evening (after 6pm) use it at least once a week.

The most common reasons for travelling on Route 16 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items, shopping for food, commuting to/from work and for medical reasons.

Respondents travel on Route 16 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because it is more convenient, better for the environment and cheaper than the car and other means of transport.

Respondents would not go anymore (40%) or don't know what they would do (32%) if the route was reduced in frequency. 50% would use a bus on a different route and 19% would travel at a different time.

Respondents would not go anymore (48%) or don't know what they would do (26%) if the route was withdrawn. 28% would use a bus on a different route, 19% would rely on friends / family and 18% would use a taxi.

Respondents expressed concern that they have no alternative means of transport and it would make travelling in the evening much more difficult. Withdrawal would prevent many from attending evening social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health. Respondents would also not be able to get to medical appointments or to shops.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 25 & Route 26: Poole - Canford Heath - Tower Park



299 respondents indicated that they use Route 25 & Route 26 in the evening.

The vast majority of Route 25 & 26 users live in Poole (92%). More than half of users are older than 65 years of age (61%), while 67% of respondents who use Route 25 & 26 are female. Half of Route 25 & 26 users have a disability (53%). While 56% of users have an older persons bus pass, 36% have no concessionary bus pass.

64% of respondents who use Route 25 & 26 in the evening (after 6pm) use it at least once a week.

The most common reasons for travelling on Route 25 & 26 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for food, shopping for other items, medical reasons and for commuting to/from work.

Respondents travel on Route 25 & 26 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient, better for the environment and cheaper than the car.

Respondents would not go anymore (41%) or don't know what they would do (31%) if the route was reduced in frequency. 28% would use a bus on a different route and 19% would travel at a different time. 21% would rely on friends / family and 18% would drive.

Respondents would not go anymore (50%) or don't know what they would do (28%) if the route was withdrawn. 21% would rely on friends / family and 20% would drive.

Respondents expressed concern that they have no alternative means of transport and it would make travelling in the evening much more difficult. Withdrawal would prevent many from attending evening social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health. Respondents would also not be able to get to shops.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

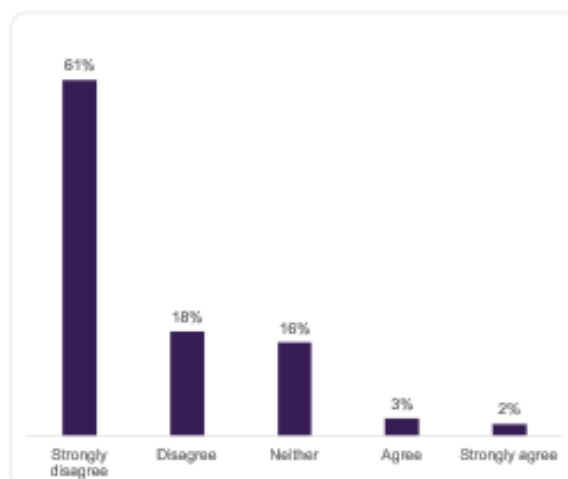
Sunday routes



The majority of respondents disagreed with the proposal to withdraw subsidies on Sunday routes.

Respondents who were significantly most likely to strongly disagree with the proposal to remove the subsidy for Sunday routes were:

- Respondents who use one of the Sunday routes
- Bournemouth, Poole and Dorset residents
- Female respondents
- Those aged 16-24 years, as well as those aged 25-64



Route 4: Poole - Broadstone - Merley-Wimborne



324 respondents indicated that they use Route 4 on Sundays.

The vast majority of Route 4 users live in Poole (86%). More than two thirds of users are older than 65 years of age (69%), while 68% of respondents who use Route 4 are female. More than half of Route 4 users have a disability (55%). While 63% of users have an older persons bus pass, 30% have no concessionary bus pass.

40% of respondents who use Route 4 on Sundays use it weekly.

The most common reasons for travelling on Route 4 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items and food.

Respondents travel on Route 4 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because it is more convenient, better for the environment and cheaper than the car.

Respondents would not go anymore (47%) or don't know what they would do (24%) if the route was reduced in frequency. 19% would drive, 18% would travel at a different time and 15% would rely on friends / family.

Respondents would not go anymore (56%) or don't know what they would do (20%) if the route was withdrawn. 21% would drive and 16% would rely on friends / family.

Respondents expressed concern that they have no alternative means of transport and it would make travelling on Sundays much more difficult. Withdrawal would prevent many from attending social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health. A withdrawal of service would also mean that they would not be able to get to church.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 8 & 9: Poole - Hamworthy - Turlin Moor- Upton - Creekmoor - Poole



283 respondents indicated that they use Route 8 & 9 on Sundays.

The vast majority of Route 8 & 9 users live in Poole (84%). Two thirds of users are older than 65 years of age (63%), while 72% of respondents who use Route 8 & 9 are female. More than half of Route 8 & 9 users have a disability (56%). While 58% of users have an older persons bus pass, 35% have no concessionary bus pass.

50% of respondents who use Route 8 & 9 on Sundays use it weekly.

The most common reasons for travelling on Route 8 & 9 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items and food.

Respondents travel on Route 8 & 9 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient, better for the environment and cheaper than the car.

Respondents would not go anymore (47%) or don't know what they would do (30%) if the route was reduced in frequency. 19% would travel at a different time, 19% would rely on friends / family and 15% would drive.

Respondents would not go anymore (60%) or don't know what they would do (26%) if the route was withdrawn. 20% would rely on friends / family and 14% would drive.

Respondents expressed concern that they have no alternative means of transport and it would make travelling on Sundays much more difficult. Withdrawal would prevent many from attending social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health. A withdrawal of service would also mean that they would not be able to get to church.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 16: Poole - Bourne Estate - Bournemouth



191 respondents indicated that they use Route 16 on Sundays.

The vast majority of Route 16 users live in Poole (86%). 81% of users are older than 65 years of age, while 67% of respondents who use Route 16 are female. More than half of Route 16 users have a disability (58%). While 55% of users have an older persons bus pass, 37% have no concessionary bus pass.

57% of respondents who use Route 16 on Sundays use it weekly.

The most common reasons for travelling on Route 16 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items and food, commuting to/from work and for medical reasons.

Respondents travel on Route 16 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient, better for the environment and cheaper than the car and other means of transport.

Respondents would not go anymore (43%) or don't know what they would do (30%) if the route was reduced in frequency. 29% would use a bus on a different route, 22% would travel at a different time and 19% would rely on friends / family.

Respondents would not go anymore (53%) or don't know what they would do (24%) if the route was withdrawn. 26% would use a bus on a different route.

Respondents expressed concern that they have no alternative means of transport and it would make travelling on Sundays much more difficult. Withdrawal would prevent many from attending social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health. A withdrawal of service would also mean that they would not be able to get to church.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route 25 & 26: Poole - Canford Heath - Tower Park



283 respondents indicated that they use Route 25 & 26 on Sundays.

The vast majority of Route 25 & 26 users live in Poole (94%). 65% of users are older than 65 years of age, while 89% of respondents who use Route 25 & 26 are female. More than half of Route 25 & 26 users have a disability (53%). While 59% of users have an older persons bus pass, 33% have no concessionary bus pass.

47% of respondents who use Route 25 & 26 on Sundays use it weekly.

The most common reasons for travelling on Route 25 & 26 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items and food.

Respondents travel on Route 25 & 26 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because it is more convenient, better for the environment and cheaper than the car.

Respondents would not go anymore (35%) or don't know what they would do (33%) if the route was reduced in frequency. 19% would travel at a different time, 18% would drive and 16% would rely on friends / family.

Respondents would not go anymore (47%) or don't know what they would do (27%) if the route was withdrawn. 19% would drive and 18% would rely on friends / family.

Respondents expressed concern that they have no alternative means of transport and it would make travelling on Sundays much more difficult. Withdrawal would prevent many from attending social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Route X6: Poole - Bearwood - Ringwood



172 respondents indicated that they use Route X6 on Sundays.

70% of Route X6 users live in Poole, 20% live in Bournemouth and 11% live in Dorset. 58% of users are older than 65 years of age, while 70% of respondents who use Route X6 are female. More than half of Route X6 users have a disability (59%). While 52% of users have an older persons bus pass, 39% have no concessionary bus pass.

43% of respondents who use Route X6 on Sundays use it weekly.

The most common reasons for travelling on Route X6 are social/meeting friends and for leisure purposes. In addition, respondents also use this route for shopping for other items and food.

Respondents travel on Route X6 because they don't have the option of travelling by other means and it is too far/difficult to walk. Others do so because they have a disability and it is more convenient, better for the environment and cheaper than the car and other means of transport.

Respondents would not go anymore (57%) or don't know what they would do (30%) if the route was reduced in frequency.

Respondents would not go anymore (83%) or don't know what they would do (22%) if the route was withdrawn.

Respondents expressed concern that they have no alternative means of transport and it would make travelling on Sundays much more difficult. Withdrawal would prevent many from attending social or leisure activities, reducing opportunities to connect with friends, family, and their community. Reductions or withdrawal would lead to isolation, loneliness and poorer physical and mental health. A withdrawal of service would also mean that they would not be able to get to church.

Many users would face significant additional and unaffordable costs from taxis or car use. Others anticipated impacts on their ability to reach work, leading to potential loss of employment.

Appendix 3: Performance Review of the existing subsidised bus network

Performance review: Evening services Monday to Saturday

Route	Route Description	Frequency	Cost of subsidy in 2025/26	Annual passenger numbers	Average number of passengers per evening (approx.)	Cost per passenger trip	Number of consultation responses linked to the route	Additional information (where applicable)
Route 4	Poole-Wimborne via Oakdale, Waterloo, Broadstone & Merley	4x return journeys after 19:00 until end of service	£50,580.97	42,612	137	£1.19	301	87% live in BCP area. 55% of respondents use the service at least once a week.
Route 8/9	Poole-Creekmoor-Upton	7x service 8 journeys. 6x service 9 operating from 18:20 until end of service	£78,966.79	91,668	294	£0.86	297	68% of respondents use the service at least once a week.
Route 14	Poole-Bourne Estate-Wallisdown-Kinson	5x return journeys hourly from 1910 operating to Kinson only.	£66,007.42	48,012	154	£1.37	153	Currently enhanced to extend journeys from Kinson to Royal Bournemouth Hospital
Route 16	Poole-Bourne Estate-Bournemouth	4x return journeys hourly from 20:30	£56,923.86	41,040	132	£1.39	205	
Route 25/26	Poole-Canford Heath/Tower Park	8x return journeys half-hourly from 18:30 then hourly from 21:15	£52,926.98	35,592	114	£1.49	299	

Performance review: Sunday Services

Route	Route Description	Frequency	Cost of subsidy in 2025/26	Annual passenger numbers	Average number of passengers per day (approx.)	Cost per passenger trip	Number of consultation responses linked to the route	Additional information (where applicable)
Route 4	Poole-Wimborne via Oakdale, Waterloo, Broadstone & Merley	Half-Hourly until 17:10 then 2x return journeys until 20:32	£20,603.50	30,444	585	£0.68	324	
Route 8	Poole-Turlin Moor via Creekmoor (Circular)	Hourly from 08:22 until 19:35. An additional 23:10 service 8 from Turlin Moor	£10,900.26	33,468	644	£0.33	283	
Route 16	Poole-Bournemouth via Newtown, Alderney, Rossmore and Westbourne	Hourly from 08:20 until 18:20. 3x return journeys from 18:30 until end of service	£8,478.08	36,564	703	£0.23	191	
Route 25	Poole-Canford Heath	1x return journey at 0830. Then 6x return journeys from 18:30 until end of service.	£11,384.70	4,080	78	£2.79	283	
Route X6	Poole-Bearwood	5x return journeys between Poole and Bearwood only	£12,959.27	6,804	131	£1.90	172	

Performance review: Monday to Saturday daytime services

Route	Route Description	Frequency	Cost of subsidy in 2025/26	Annual passenger numbers	Average number of passengers per day (approx.)	Cost per passenger trip	Number of consultation responses linked to the route	Additional information (where applicable)
Route ONE	Poole Town Circular via Hospital, Railway Station, Poole Quay and Baiter	Half-Hourly	£78,811.44	135,624	435	£0.58	742	80% of passengers aged 65+. 70% have a disability. 89% use this service at least once a week. 76% have a concessionary bus pass. Contract price will reduce in 2026 when vehicles are supplied by BCP Council.
Route 7 A/B/C	Upper Parkstone-Alderney East/Bloxworth/Tower Park (Circulars)	4x round trips for each service variation.	£20,623.40	44,388	142	£0.46	250	76% of passengers aged 65+. 67% have a disability. 92% use this service at least once a week. 68% have a concessionary bus pass.
Route 10	Poole-Lytchett Matravers via Sterte, Wessex Gate and Upton	7x round trips	£14,745.29	6,960	22	£2.12	319	64% of passengers live in Dorset. 65% of passengers aged 65+.
Route 18	Bournemouth-Broadstone via Westbourne, Upper Parkstone, Canford Heath	Hourly	£274,511.81	306,984	984	£0.89	574	72% of passengers aged 65+. 83% use this service at least once a week.
Route 20	Poole-Castlepoint via Lilliput, Penn Hill, Westbourne & Bournemouth	Hourly	£103,230.36	136,332	437	£0.76	489	82% of passengers aged 65+. 60% have a disability. 86% of passengers use this service at least once a week.
Route 32	Poole-Bournemouth via Oakdale, Broadstone, Merley, Kinson and Winton	2x return journeys	£72,305.44	27,132	87	£2.66	238	77% of passengers aged 65+. 64% have a disability. 84% travel on this route at least once a week.
Route 33	Bournemouth-Christchurch via East Cliff, Boscombe, RBH & Southbourne	Hourly. Reduced route on Saturday PM (Bournemouth to Royal Bournemouth Hospital only)	£227,159.85	160,212	514	£1.42	447	83% of passengers aged 65+. 59% have a disability. 83% use this service at least once a week.
Route 36	Talbot View-Kinson via Bournemouth, Branksome Woods & West Howe	Hourly	£231,428.36	119,280	382	£1.94	527	68% of passengers aged 65+. 50% have a disability. 90% use this service at least once a week.

Performance review: School Services

Route	Route Description	Frequency	Cost of subsidy in 2025/26	Annual passenger numbers (2024/25 academic year)	Average number of passengers per trip (approx.)	Cost per passenger trip	Number of consultation responses linked to the route	Additional information (where applicable)
Route 46	Throop-Avonbourne Academies via Winton, Charminster and Lansdowne	1 return journey on schooldays	£32,336.85	9,789	26	£3.30	5	13 passengers with statutory entitlement to school transport using the 46 and 81 routes. 4 of the respondents use the 46 route on a daily basis and 4 use the 81 route on a daily basis.
Route 81	Fiveways-Avonbourne Academies via Castle La. West & Chesildene Dr.	1 return journey on schooldays	£36,001.61	5,741	15	£6.27	8	
Route 448	Poole-Parkstone & Poole Grammar Schools via Hamworthy and Creekmoor	1 return journey on schooldays	£33,307.71	10,054	26	£3.31	37	67% of respondents use the 448 route on a daily basis.
Route 744	Baiter & Poole Old Town - Oakdale Junior School	1 return journey on schooldays	£15,726.36	11,445	30	£1.37	18	Approx 1.3 miles at furthest point. 78% of respondents use the 744 on a daily basis.
Route 40	Lower Hamworthy/T.Moor-St Edward's & St Mary's Schools via Creekmoor	1 return journey on schooldays	£45,600.00	5,510	15	£8.28	57	Price is for annual equivalent of current temporary contract set up until end of Summer Term 2026 following termination be previous operator. Previous price was £36,556 = £6.63 per passenger trip. 1 passenger with statutory entitlement to school transport. 57% use the 40 daily. Passengers redirected to alternative network bus routes.
Route 425	Wallisdown-Corfe Hills & Broadstone (Mid) Schools via Bearwood & Merley	1 return journey on schooldays	£38,339.00	6,864	18	£5.59	43	3 passengers with statutory entitlement to school transport. 67% of the respondents using the 425 travel daily.

Appendix 4: Subsidised Bus Service Network Proposal (Option 3)

Recommended changes (Option 3): Evening services Monday to Saturday

Route	Route Description	Current frequency	Cost of subsidy in 2025/26	Average number of passengers per evening (approx.)	Cost per passenger trip	Additional information (where applicable)	Recommended change	Estimated council derived bus subsidy spend in 2026/27 (up to end of May 2026)
Route 4	Poole-Wimborne via Oakdale, Waterloo, Broadstone & Merley	4x return journeys after 19:00 until end of service	£50,580.97	137	£1.19	87% live in BCP area. 55% of respondents use the service at least once a week.	Morebus to operate commercially. Timetable to be confirmed but is expected that some of the journeys will operate via Corfe Mullen rather than Merley. May be slight overall reduction in service.	£8,430.16
Route 8/9	Poole-Creekmoor-Upton	7x service 8 journeys. 6x service 9 operating from 18:20 until end of service	£78,966.79	294	£0.86	68% of respondents use the service at least once a week.	Morebus to operate commercially. Timetable to be confirmed. Poole-Hamworthy-Upton remains hourly. Other journeys expected to see some reduction.	£13,161.13
Route 14	Poole-Bourne Estate-Wallisdown-Kinson	5x return journeys hourly from 1910 operating to Kinson only.	£66,007.42	154	£1.37	Currently enhanced to extend journeys from Kinson to Royal Bournemouth Hospital	Morebus to operate commercially. Timetable to be confirmed but likely to see minor changes only.	£11,001.24
Route 16	Poole-Bourne Estate-Bournemouth	4x return journeys hourly from 20:30	£56,923.86	132	£1.39	-	Morebus to operate commercially. Timetable to be confirmed but likely to see minor changes only.	£9,487.31
Route 25/26	Poole-Canford Heath/Tower Park	8x return journeys half-hourly from 18:30 then hourly from 21:15	£52,926.98	114	£1.49	-	Morebus to operate commercially. Timetable to be confirmed but a minimum hourly service will be retained. Daytime commercial service will also be reviewed with expected reductions.	£8,821.16

Recommended changes (Option 3): Sunday Services

Route	Route Description	Frequency	Cost of subsidy in 2025/26	Average number of passengers per day (approx.)	Cost per passenger trip	Additional information (where applicable)	Recommended change	Estimated council derived bus subsidy spend in 2026/27 (up to end of May 2026)
Route 4	Poole-Wimborne via Oakdale, Waterloo, Broadstone & Merley	Half-Hourly until 17:10 then 2x return journeys until 20:32	£20,603.50	585	£0.68	-	Morebus to operate commercially. Timetable to be confirmed but no significant changes expected.	£3,433.92
Route 8	Poole-Turlin Moor via Creekmoor (Circular)	Hourly from 08:22 until 19:35. An additional 23:10 service 8 from Turlin Moor	£10,900.26	644	£0.33	-	Morebus to operate commercially. Timetable to be confirmed but no significant changes expected.	£1,816.71
Route 16	Poole-Bournemouth via Newtown, Alderney, Rossmore and Westbourne	Hourly from 08:20 until 18:20. 3x return journeys from 18:30 until end of service	£8,478.08	703	£0.23	-	Morebus to operate commercially. Timetable to be confirmed but no significant changes expected.	£1,413.01
Route 25	Poole-Canford Heath	1x return journey at 0830. Then 6x return journeys from 18:30 until end of service.	£11,384.70	78	£2.79	-	Morebus to operate commercially. Timetable to be confirmed but no significant changes expected.	£1,897.45
Route X6	Poole-Bearwood	5x return journeys between Poole and Bearwood only	£12,959.27	131	£1.90	-	Morebus to operate commercially. Timetable to be confirmed but no significant changes expected.	£2,159.88

Recommended changes (Option 3): Monday to Saturday daytime services

Route	Route Description	Frequency	Cost of subsidy in 2025/26	Average number of passengers per day (approx.)	Cost per passenger trip	Additional information (where applicable)	Recommended change	Estimated council derived bus subsidy spend in 2026/27 (up to end of May 2026)
Route ONE	Poole Town Circular via Hospital, Railway Station, Poole Quay and Baiter	Half-Hourly	£78,811.44	435	£0.58	80% of passengers aged 65+. 70% have a disability. 89% use this service at least once a week. 76% have a concessionary bus pass. Contract price will reduce in 2026 when vehicles are supplied by BCP Council.	No change to the route or timetable.	n/a in lieu of LABG
Route 7 A/B/C	Upper Parkstone-Alderney East/Bloxworth/Tower Park (Circulars)	4x round trips for each service variation.	£20,623.40	142	£0.46	76% of passengers aged 65+. 67% have a disability. 92% use this service at least once a week. 68% have a concessionary bus pass.	No change to the route or timetable.	n/a in lieu of LABG
Route 10	Poole-Lytchett Matravers via Sterte, Wessex Gate and Upton	7x round trips	£14,745.29	22	£2.12	64% of passengers live in Dorset. 65% of passengers aged 65+.	No change to the route or timetable.	n/a in lieu of LABG
Route 18	Bournemouth-Broadstone via Westbourne, Upper Parkstone, Canford Heath	Hourly	£274,511.81	984	£0.89	72% of passengers aged 65+. 83% use this service at least once a week.	No change to the route or timetable.	n/a in lieu of LABG
Route 20	Poole-Castlepoint via Lilliput, Penn Hill, Westbourne & Bournemouth	Hourly	£103,230.36	437	£0.76	82% of passengers aged 65+. 60% have a disability. 86% of passengers use this service at least once a week.	Revised hourly service to operate from Poole – Bournemouth - Castlepoint – Royal Bournemouth Hospital – Southbourne – Christchurch, replacing route 33 between Royal Bournemouth Hospital and Christchurch via Southbourne Additional peak hour journeys provided with new direct links to Bournemouth Hospital. Morebus to confirm revised timetable.	n/a in lieu of LABG
Route 32	Poole-Bournemouth via Oakdale, Broadstone, Merley, Kinson and Winton	2x return journeys	£72,305.44	87	£2.66	77% of passengers aged 65+. 64% have a disability. 84% travel on this route at least once a week.	No change to the route or timetable.	n/a in lieu of S106 developer funding
Route 33	Bournemouth-Christchurch via East Cliff, Boscombe, RBH & Southbourne	Hourly. Reduced route on Saturday PM (Bournemouth to Royal Bournemouth Hospital only)	£227,159.85	514	£1.42	83% of passengers aged 65+. 59% have a disability. 83% use this service at least once a week.	No change to the route or timetable.	n/a in lieu of LABG
Route 36	Talbot View-Kinson via Bournemouth, Branksome Woods & West Howe	Hourly	£231,428.36	382	£1.94	68% of passengers aged 65+. 50% have a disability. 90% use this service at least once a week.	No change to the route or timetable.	n/a in lieu of LABG

Recommended changes (Option 3): School Services

Route	Route Description	Frequency	Cost of subsidy in 2025/26	Average number of return journeys per day approx. 2024/25 academic year	Cost per passenger trip	Additional information (where applicable)	Recommended change	Estimated council derived bus subsidy spend in 2026/27
Route 46	Throop-Avonbourne Academies via Winton, Charminster and Lansdowne	1 return journey on schooldays	£32,336.85	26	£3.30	13 passengers with statutory entitlement to school transport using the 46 and 81 routes. 4 of the respondents use the 46 route daily and 4 use the 81 route daily.	Services 46 and 81 to be withdrawn at the end of the Summer Term 2026 and replaced with a new combined route from the start of the Autumn Term 2026.	£22,780.00
Route 81	Fiveways-Avonbourne Academies via Castle La. West & Chesildene Dr.	1 return journey on schooldays	£36,001.61	15	£6.27			
Route 448	Poole-Parkstone & Poole Grammar Schools via Hamworthy and Creekmoor	1 return journey on schooldays	£33,307.71	26	£3.31	67% of respondents use the 448 route daily.	No change to the route or timetable.	n/a in lieu of LABG
Route 744	Baiter & Poole Old Town - Oakdale Junior School	1 return journey on schooldays	£15,726.36	30	£1.37	Approx 1.3 miles at furthest point. 78% of respondents use the 744 daily.	No change to the route or timetable.	n/a in lieu of LABG
Route 40	Lower Hamworthy/T.Moor-St Edward's & St Mary's Schools via Creekmoor	1 return journey on schooldays	£45,600.00	15	£8.28	Price is for annual equivalent of current temporary contract set up until end of Summer Term 2026 following termination by previous operator. Previous price was £36,556 = £6.63 cost per passenger trip. 1 passenger with statutory entitlement to school transport. 57% use the 40 daily. Passengers redirected to alternative network bus routes. Sept to Dec 2025 data indicates the average number of return journeys has reduced to 9 per day. If this continued across the 2025/26 academic year, then the cost per passenger trip would be £13.33	Service to not operate beyond end of 2026 summer term. Passengers redirected to alternative network bus routes and/or other sustainable transport alternatives.	£15,200.00 (Children's Services)
Route 425	Wallisdown-Corfe Hills & Broadstone (Mid) Schools via Bearwood & Merley	1 return journey on schooldays	£38,339.00	18	£5.59	3 passengers with statutory entitlement to school transport. 67% of the respondents using the 425 travel daily. Sept to Dec 2025 data indicates the average number of return journeys has marginally increased. Sept to Dec 2024 the average number of return journeys was 22 per day. Sept to Dec 2025 the average number of return journeys was 23 per day.	Service to not operate beyond end of 2027 summer term. Passengers redirected to alternative network bus routes and/or other sustainable transport alternatives.	£40,256.00 (Children's Services) Note: approx. £13,000 required in 2027/28 financial year to operate service until end of Summer 2027 term.

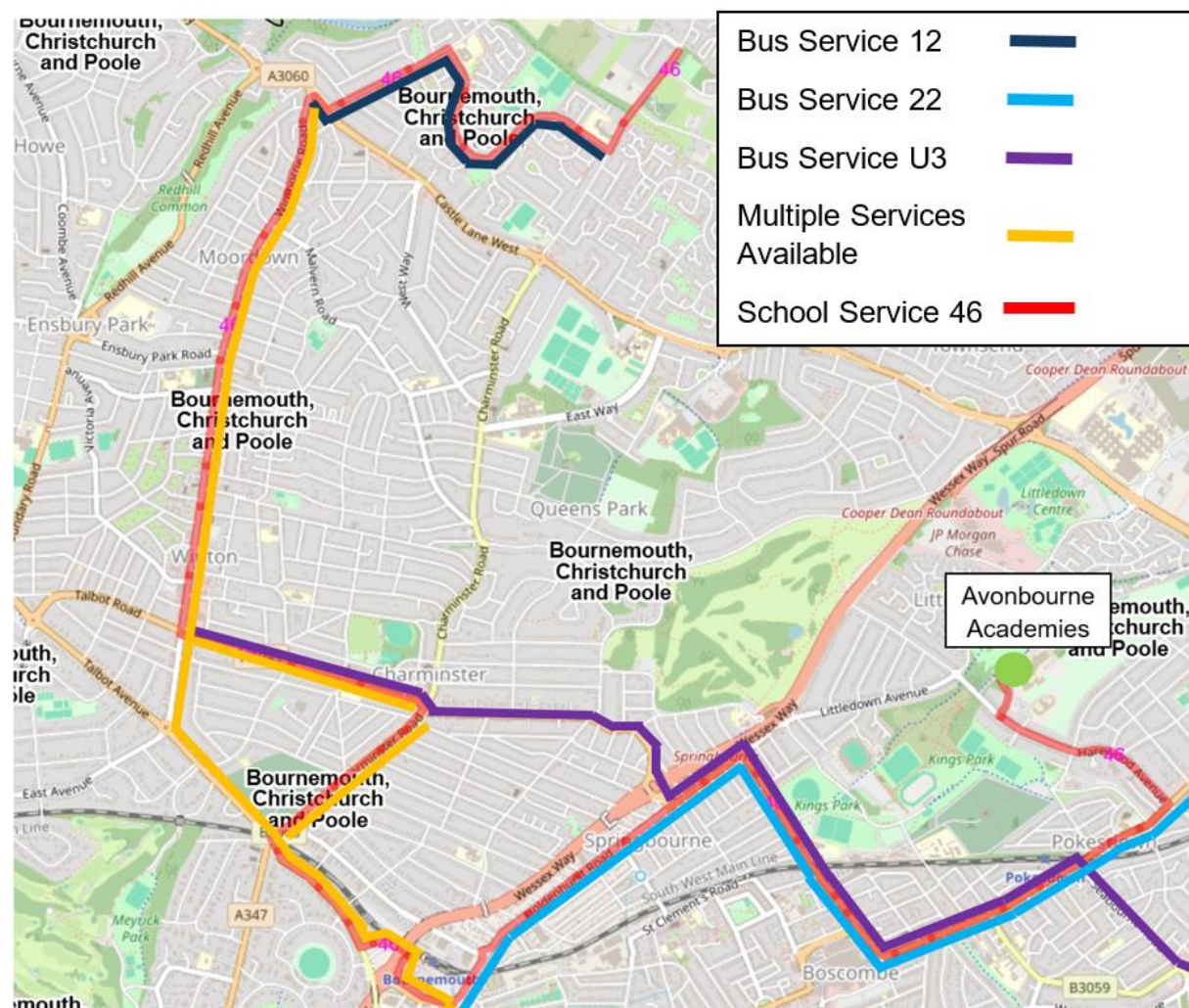
Appendix 5: Alternative journey options examples for school services and Children's Services Comments

Where local authority school bus services are recommended for withdrawal, there are instances where the existing local bus network can offer alternative travel options. Please note the following alternative journey suggestions are based on current timetabled services that make up the local bus network. These services could be subject to change by the operator. Services may also be subject to unforeseen disruption, such as breakdown or abnormal traffic congestion, which could lead to advertised journeys being delayed or cancelled.

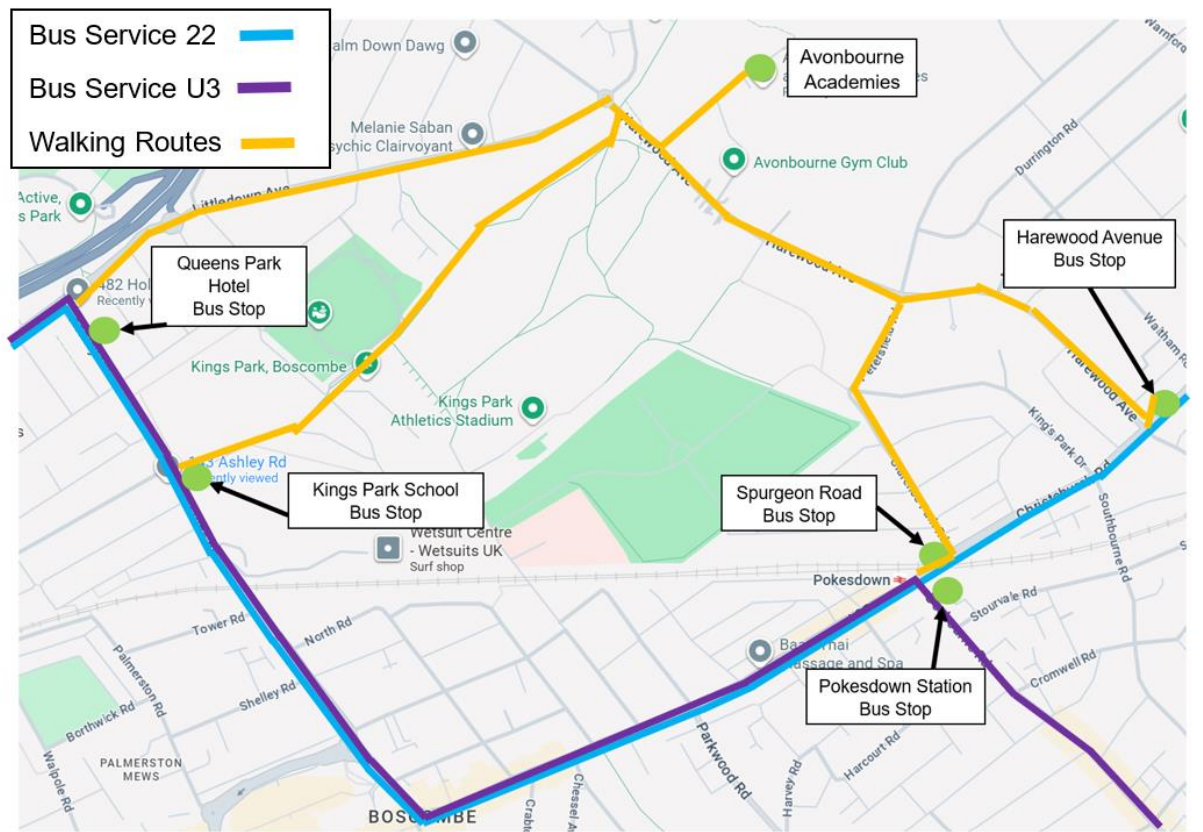
Service 46

Service 46 operates from Throop and serves Avonbourne Academies. The service departs at 07:20 and operates via Muscliff, Moordown, Winton, Charminster, Bournemouth Station, Springbourne, Boscombe and Pokesdown before arriving at Avonbourne Academies at 08:05. Students are required to be on site for registration at 08:30

Most of the route is covered by the local bus network, although for many, there would need to be a bus change as part of their journey. For students in Throop, they would need to undertake a 10-minute walk to the nearest bus stop on Shillingstone Drive for the nearest local bus service. There will also be a short walk between the bus stops and school site. The map below shows services available in comparison to the existing service.



Due to the location of the school relative to the nearest network provision, students have several choices where they can disembark bus services in Boscombe and Pokesdown, all of which are an approximate 20-minute walk to the school site. The map below shows the multiple walking routes available following disembarking from services 22 or U3.



For students in Moordown, Winton and Charminster, there are multiple services available to get students to Bournemouth Station. From there, they can connect with the Service 22 which departs Bournemouth Square at 07:25, connecting with the service at Bournemouth Station at 07:33. The service then reaches Boscombe at around 07:48. With walking considered, students would be on site at around 08:08. This is three minutes later than the scheduled arrival time for the current school service.

22	
Bournemouth Square [Q]	07:25
Bournemouth Railway Station [6]	07:33
Springbourne Library	07:38
Boscombe Bus Station [D]	07:48
Royal Bournemouth Hospital [C]	08:08
Mount Pleasant Drive	-
Townsend, Jewell Academy	08:16
Castlepoint, Hamblin Way [F]	08:22

Board service at Bournemouth Station at 07:33 to disembark at Boscombe at 07:48

Those in Winton and Charminster can also consider using Service U3 (during university term time only) which travels direct between Winton and Charminster to Boscombe. Students can board the service which departs Bournemouth University at 0735 and arrives at Boscombe around 08:02, With walking considered, students would be on site at around 08:22.

U3	
Bournemouth University, Talbot Campus [D]	07:35
Winton Banks, Alma Road [E]	07:42
Charminster, Richmond Park Road	07:48
Richmond Park Road, Gilbert Road	07:55
Boscombe, Christchurch Road	08:02
Pokesdown Railway Station	08:06
Douglas Mews	08:08
Southbourne, Fishermans Walk	08:10

Disembark at
Boscombe at 08:02

As mentioned, students living in Muscliff and Throop are impacted due to being at the furthest end of the route. One option available to students is to board Service 12 which departs Castlepoint at 07:04 and to disembark at Bournemouth Station at 07:31, to connect with the above-mentioned Service 22 from Bournemouth Square. However, this only gives students 2 minutes to make the switch between services; any delay to Service 12 could result in missing this connection.

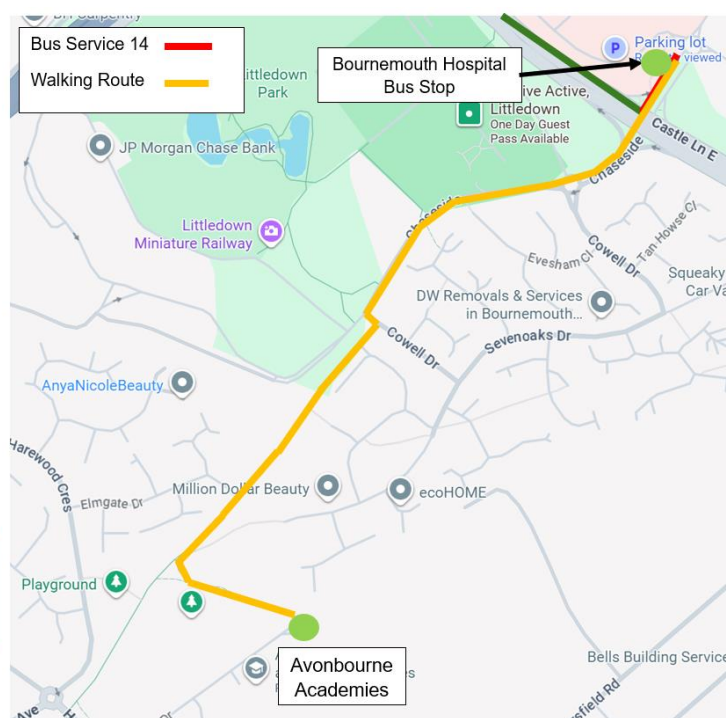
Alternatively, students in Muscliff can board Service 12 which departs Bournemouth Square at 06:32 and travel to Castlepoint, arriving at 07:02. The service then Service 22 departing Castlepoint at 07:05, arriving at Boscombe around 07:32. With walking from time from the bus stop considered, students would be arriving to school before 08:00; this is five minutes earlier than the current school service.

12	
Bournemouth Square [Z]	06:32
Bournemouth Railway Station [2]	06:39
Winton Banks, Waitrose [B]	06:45
Westover Retail Park	06:52
Muscliff Primary School	06:56
Castlepoint, Hamblin Way [E]	07:02

22	
Castlepoint, Hamblin Way [E]	07:05
Mount Pleasant Drive	-
Townsend, Jewell Academy	07:09
Royal Bournemouth Hospital [A]	07:18
Boscombe Bus Station [C]	07:32
Springbourne Library	07:39
Dorchester House, Holdenhurst Road [7]	07:42
Bournemouth Square [Q]	07:50

The final option would be for students in Muscliff to walk to Castle Lane West to connect with Service 14 which departs Poole Bus Station at 06:30. The service runs along Castle Lane West at around 07:24 and arrives at Bournemouth Hospital at 07:40. The walking time from Bournemouth Hospital to Avonbourne Academies is approximately 20 minutes, similar to the walking times for other services. Students would arrive on site at approximately 08:00, which is five minutes before the scheduled time of the current school service.

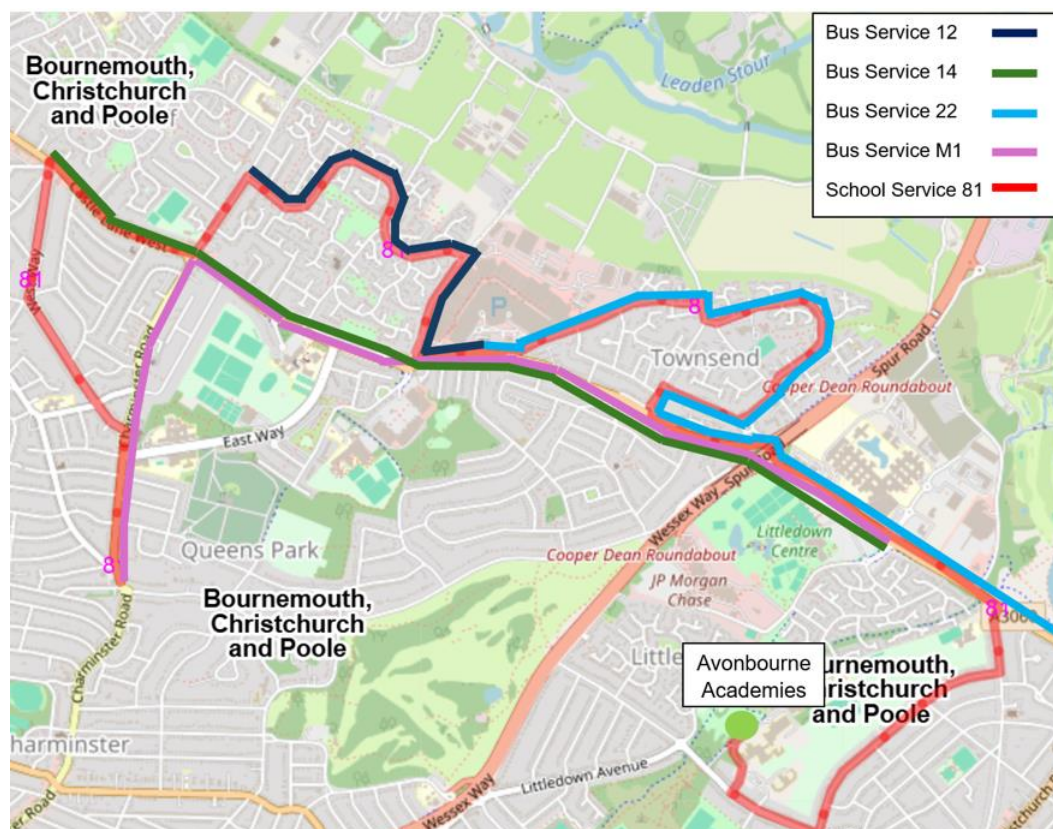
14	
Poole Bus Station [N]	06:30
Sea View, Constitution Hill [A]	06:38
Newtown Tesco	06:42
Alderney, Stone Park Corner	06:45
Mountbatten Roundabout, Walli...	06:49
Wallisdown Roundabout, Tesco	06:53
West Howe, Fernheath Road	06:56
West Howe, Cunningham Cresc...	07:02
Kinson Library, Wimborne Road	07:09
East Howe, Palfrey Road	07:12
Ensburry Park, Cherries Drive	07:17
Westover Retail Park	07:24
Castlepoint, Castle Lane [B]	07:31
Royal Bournemouth Hospital [C]	07:40



Service 81

Service 81 operates from The Fiveways, Charminster and serves Avonbourne Academies. The service departs at 07:23 and operates via Muscliff, Castlepoint and Townsend, arriving at Avonbourne Academies at 08:05.

The majority of the route is covered by the local bus network. A small section of the route that is uncovered is West Way. Students can either walk to Charminster Road to connect with service M1 or walk to Castle Lane West to connect with service 14. In both cases this walk is approximately 10 minutes from the existing route. Where sections are not covered, there may be a small walk for students to connect with these services. The map below shows services available in comparison to the existing service.



The majority of services terminate at Bournemouth Hospital, though service 22 continues along Castle Lane East, giving opportunity for students to alight at 'Castle Lane Tesco' bus stop. The map below shows the multiple walking routes available from these stops. The walking time for these routes is approximately 20 minutes, and these are currently utilised by existing students that use the local bus network.



For most students there are multiple journeys provided by services 14, 22 and M1 along Castle Lane West which give multiple options to travel to Bournemouth Hospital then walk to school. Whilst students in Muscliff can use options outlined in relation to Service 46 above.

12	
Bournemouth Square [Z]	06:32
Bournemouth Railway Station [2]	06:39
Winton Banks, Waitrose [B]	06:45
Westover Retail Park	06:52
Muscliff Primary School	06:56
Castlepoint, Hamblin Way [E]	07:02

22	
Castlepoint, Hamblin Way [E]	07:05
Mount Pleasant Drive	-
Townsend, Jewell Academy	07:09
Royal Bournemouth Hospital [A]	07:18
Boscombe Bus Station [C]	07:32
Springbourne Library	07:39
Dorchester House, Holdenhurst Road [7]	07:42
Bournemouth Square [Q]	07:50

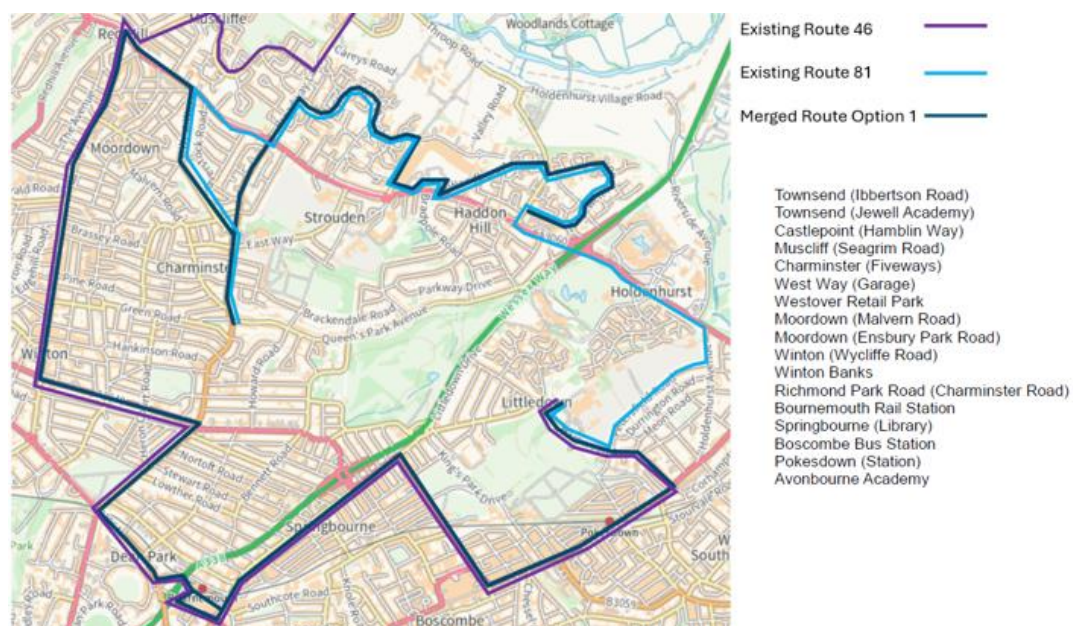
m1			
Poole Bus Station [A]	06:44	06:50	06:56
Lower Parkstone, Ashley Cross	06:51	06:57	07:03
Upper Parkstone, Jubilee Road	06:57	07:03	07:10
Westbourne, County Gates	07:04	07:11	07:18
Bournemouth Square [P]	07:13	07:21	07:29
Bournemouth Railway Station [4]	07:21	07:29	07:37
Charminster, Richmond Arms	07:27	07:35	07:43
Castlepoint, Castle Lane [B]	07:37	07:46	07:55
Royal Bournemouth Hospital [B]	07:43	07:53	08:02

14	
Poole Bus Station [N]	06:30
Sea View, Constitution Hill [A]	06:38
Newtown Tesco	06:42
Alderney, Stone Park Corner	06:45
Mountbatten Roundabout, Walli...	06:49
Wallisdown Roundabout, Tesco	06:53
West Howe, Fernheath Road	06:56
West Howe, Cunningham Cresc...	07:02
Kinson Library, Wimborne Road	07:09
East Howe, Palfrey Road	07:12
Ensbury Park, Cherries Drive	07:17
Westover Retail Park	07:24
Castlepoint, Castle Lane [B]	07:31
Royal Bournemouth Hospital [C]	07:40

Combining the 46 and 81:

Prior to the bus subsidy review, work had been underway to investigate the potential to combine services 46 and 81 into one single service, due to both services having higher operational costs due to low patronage.

The proposed amended service starts at Townsend operating a reverse of the current service 81 to Fiveways then travelling to Westover Retail Park before continuing the existing route of Service 46 to Avonbourne Academies. This route would result in earlier timing for students in Townsend. It is likely students in this area may use Services 14, 22 and M1 to travel to Bournemouth Hospital as previously mentioned instead.



This option covers the majority of both existing school services, using one vehicle instead of two. The cost of operating either option would be around £32,000.00. This would be a saving of around £36,000.00 based on current operating costs outlined in Appendix 3.

Children's Services Comments regarding the proposed withdrawal of Routes 81 and 46 in their current form and replacement with a new combined route

These routes are recommended to be withdrawn in their current form and will combine to form Route 46. This reflects high costs per person, low use and route overlaps with operational inefficiency. Route 46 was established as a dedicated school bus service for Avonbourne Academies, providing a direct journey at school times for pupils travelling from Throop, Muscliff, Moordown, Winton, Charminster and surrounding areas—offering a consistent, reliable single-bus journey aligned to school start times. Route 81 was set up to provide a direct, timetabled school-day link to Avonbourne Academies from the Fiveways and Castle Lane West area, ensuring pupils could travel to school on a single bus without the need for connections across sections of the network not then well served by the commercial bus system. Further detailed work will be required to understand the implications of withdrawing the current Routes 81 and 46 and introducing the proposed combined Route 46. The next steps outlined below set out the analysis needed to assess any potential impact on eligible children, ensure appropriate mitigations, and avoid unintended consequence.

Routes 81 and 46 Next Steps and Mitigations

- Understand the proposed combined route and investigate whether any eligible children would be adversely affected
- Work with schools to identify children with vulnerable identifiers and any other concerns
- Work with GIS colleagues to identify postcodes surrounding the route within a reasonable distance and investigate whether they would qualify for transport assistance under extended rights

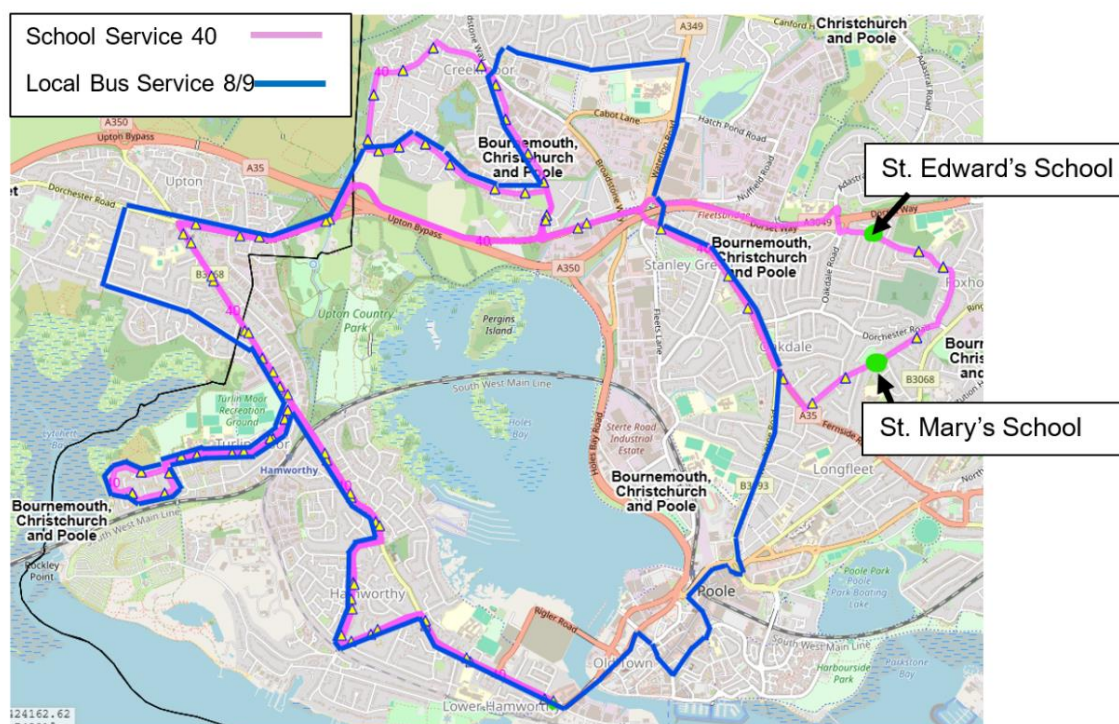
Service 40

Service 40 operates from Lower Hamworthy and serves St. Edward's and St. Mary's Schools. The route operates via Hamworthy, Turlin Moor, Upton, Creekmoor then to Oakdale to serve both schools. The service departs from Lower Hamworthy at 07:46, arriving at St Edwards School at 08:29 and St. Mary's School (Pound Lane) at 08:35. For both schools, students are required to be on site for registration at 08:45.

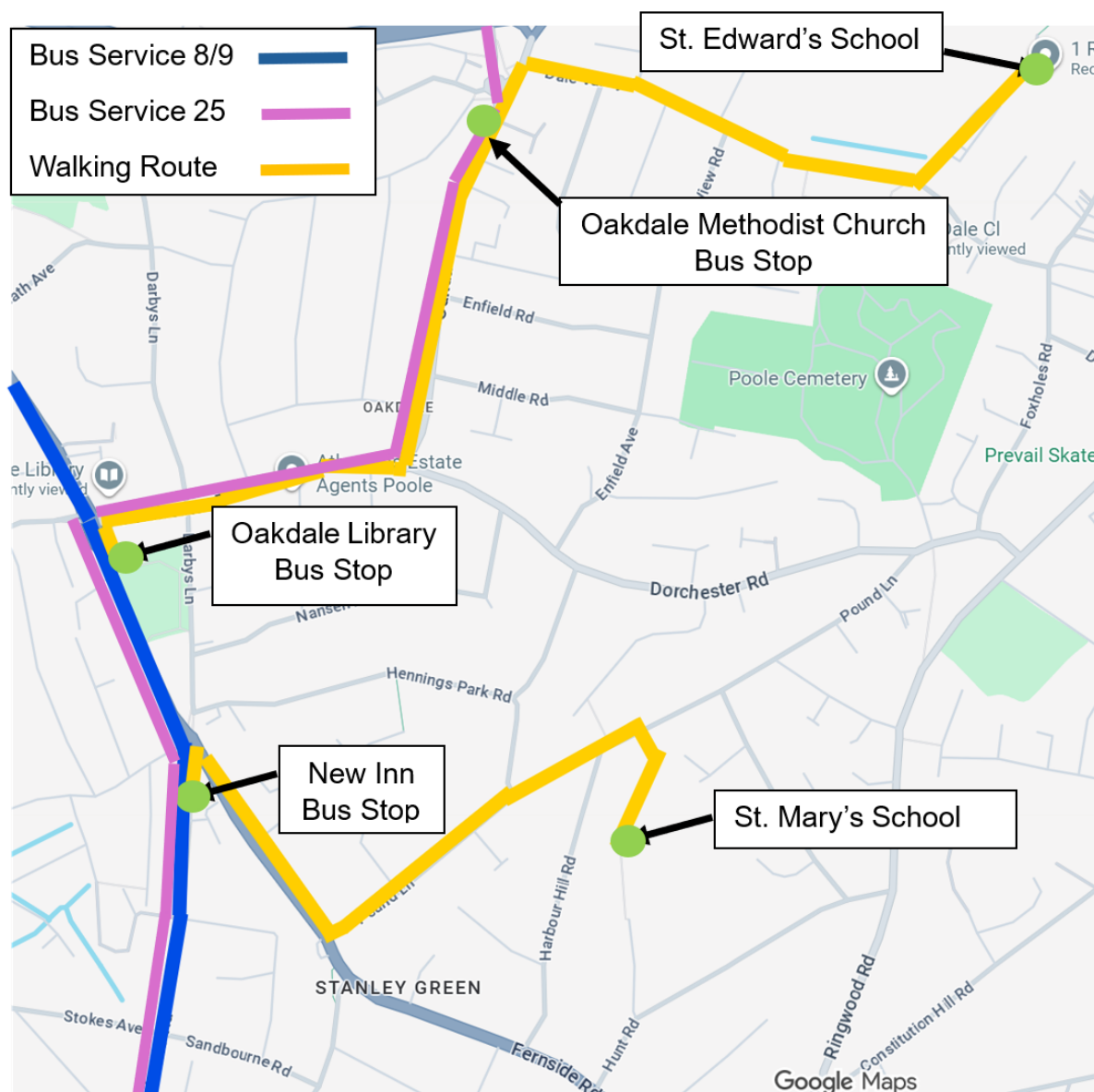
Service 40 timetable:

Morning	Time	Afternoon	Time
Blandford Road (Potter's Arms)	0746	Dale Valley Road (for St Edward's School)	1528
Blandford Road (Ashmore Avenue)	0747	Pound Lane (Bus bay near footpath to St Mary's School)	1535
Blandford Road (Coles Avenue/Co-op)	0748	Creekmoor Lane (Northmead Ave)	1543
Coles Avenue (Lakeside)	0750	Beechbank Avenue	1546
Lake Road (Hamilton Road)	0751	Longmeadow Lane	1548
Blandford Road (Dawkins Road)	0752	Woodpecker Drive	1550
Turlin Road (Fitzworth Avenue)	0754	Northmead Drive	1552
Turlin Road (Shops)	0756	Blandford Road (Upton Cross Roads)	1557
Egmont Road (Peverell/Patchins Rd)	0758	Blandford Road (Sandy Lane)	1558
Blandford Road (Sandy Lane)	0804	Turlin Road (Fitzworth Avenue)	1601
Blandford Road (Upton Crossroads)	0806	Turlin Road (Shops)	1603
Creekmoor Lane (Northmead Ave)	0812	Turlin Road (Egmont/Patchins Rd)	1605
Beechbank Avenue	0815	Blandford Road (Dawkins Road)	1607
Longmeadow Lane	0817	Lake Road (Hamilton Road)	1609
Woodpecker Drive	0819	Coles Avenue (Lakeside)	1610
Northmead Drive	0821	Blandford Road (Coles Avenue/Co-op)	1612
Dale Valley Road (for St Edward's School)	0829	Blandford Road (Ashmore Avenue)	1613
Pound Lane (Bus bay near footpath to St. Mary's School)	0835	Blandford Road (Potter's Arms)	1614

Most of the school service route is replicated by Service 8 which operates a circular route between Poole, Hamworthy, Upton, Creekmoor, Fleetsbridge and back to Poole in a clockwise direction. Service 9 operates along the same line of route but in an anticlockwise direction. The map below shows the routes for both services for comparison.



As shown on the route map comparison, Services 8 and 9 do not directly pass either school; students therefore must undertake a walk from the nearest bus stop. The recommended walking routes for students is shown on the map below.



For St. Edward's School, pupils can disembark Service 8 or 9 from 'Oakdale Library' bus stop. It is then an approximate 23-minute walk to the school site from here. Students may also consider disembarking here to connect with Service 25 to travel as far as Oakdale Methodist Church; although this journey is only a couple of minutes, it does reduce overall walking time to 13 minutes. Pupils at St. Mary's School can disembark at 'New Inn' bus stop. It is then an approximate 15-minute walk to the school site.

As service 8 replicates much of the route and direction of travel, this could be the preferred option for many. Students can board the service which departs from Poole Bus Station at 07:03 and travel until reaching Oakdale at around 07:55 where they can disembark to then walk to school as described above. This option may be preferred for students living in the Upton and Creekmoor areas.

<< 8	
Poole Bus Station [F]	07:03
Poole, Old Orchard	07:07
Hamworthy, Ashmore Avenue	07:13
Hamworthy, Red Lion	07:18
Turlin Moor, Foreland Road	07:24
Upton, Sandy Close	07:33
Upton, Moorland Way	07:36
Upton Crossroads, Poole Road	07:39
Upton Country Park, entrance	07:41
Creekmoor, Northmead Dr/Millfield	07:47
Fleetsbridge, The Fleetsbridge	07:52
Oakdale Library	07:55
Poole Bus Station [F]	08:02

Disembark service at this point

Alternatively, students may consider using Service 9 travelling in an anticlockwise direction. The service departs Poole Bus Station at 08:05, reaching Oakdale at around 08:11; Students could also disembark the service and board Service 25. This is 16 minutes later than the most suitable Service 8 mentioned above, but would still ensure students are punctual for school, allowing for the walking time from bus stop to school site. This option may be preferable for students living in Hamworthy and Lower Hamworthy.

>> 9		9	9	9	9	9
Poole Bus Station	06:58	07:13	07:30	-	08:05	
Oakdale, Esso Garage	07:03	07:18	07:36	-	08:11	
Fleetsbridge, The Fleetsbridge	07:05	07:20	07:38	-	08:13	
Creekmoor, Northmead Dr/Millfi...	07:08	07:23	07:41	-	08:16	
Upton Crossroads, Dorchester ...	07:16	07:32	07:51	-	08:26	
Upton, Moorland Way	07:18	07:34	07:53	-	08:28	
Upton, Sandy Close	07:21	07:37	07:56	-	08:31	
Turlin Moor, Foreland Road	07:26	07:43	08:03	08:17	08:38	
Hamworthy, Red Lion	07:36	07:55	08:16	08:29	08:48	
Hamworthy, Ashmore Avenue	07:45	08:05	08:27	08:38	08:55	
Poole, Old Orchard	07:51	08:11	08:33	08:44	09:01	
Poole Bus Station	07:59	08:20	08:41	08:53	09:09	

25	
Poole Bus Station [D]	08:05
Oakdale Library	08:12
Canford Heath, The Pilot	08:17
Canford Heath Asda	08:26
Tollerford Road, Steeple Close	08:30
Tower Park	-

Disembark services from Poole Bus Station at this point for either service

Children's Services Comments regarding the proposed withdrawal of Route 40

Route 40 transports pupils from Turlin Moor and Hamworthy to St Mary's Catholic Primary School and St Edward's Catholic School. The service is recommended for withdrawal in July 2026 due to very high subsidy, low usage, and suitable network alternatives. Route 40 was introduced by Children's Services as a dedicated school bus to transport pupils who had a statutory entitlement to free home-to-school transport, and historically the route carried high numbers of eligible children. Details of our initial assessment are as follows:

Children Attending St Mary's Catholic Primary

- There are no children travelling on Route 40 to St Mary's Catholic Primary School who have been assessed as entitled to receive free assistance with home to school transport.
- The distance from Turlin Moor to St Mary's Catholic Primary School is approximately 4 miles safe walking distance. Children travelling to St Mary's indicates a distinct preference from families to attend a distant school likely on the basis of faith. Eligibility for transport assistance for primary-aged children depends on the nearest suitable school, not the preferred school and there is no entitlement on the grounds of faith alone.
- There are surplus places at other local schools in the Turlin Moor and Hamworthy area within 0.3–1.8 miles. This is well within the statutory walking distances of 2-3 miles depending on the age of the child.
- Details of any children who may be travelling on this route who are not eligible for home to school transport are not available.

Children Attending St Edward's RC CE Secondary

- One eligible pupil currently receives a bus pass under extended rights (FSM + nearest faith school). This entitlement will continue and there is an alternative public network service available for the continuation of travel.
- Three other FSM pupils live along the route and could apply for transport under extended rights but do not currently do so. If they applied and qualified, they would receive a bus pass.
- 31 additional non-FSM pupils from the same postcodes attend St Edward's RC CE Secondary School. Eligibility is unlikely unless other criteria apply.
- For families who no longer wish to travel to St Edward's RC CE Secondary School, local secondary places are available within 1.8 miles – this is within the 3-mile statutory walking distance.
- Alternative public transport is available. For children travelling from the area, the anticipated route would be:
 - 07:25 No. 9 to Poole Bus Station (30 min)
 - 08:05 No. 25 Canford Heath (10 min)
 - 08:15 Walk 0.5 miles to school (approx. 15 mins) (total journey time 55 minutes)
- The suggested alternative is within the recommended maximum journey time of 75 minutes for secondary-aged children.

Route 40 Summary Position Across both Schools

- Eligibility: Only 1 pupil is formally eligible; 3 others could become eligible if they apply; the remainder are non-eligible travellers.
- Access to education: All pupils have reasonable alternatives, either via the commercial network or via local schools within statutory walking distances.
- Risk: Potential unknown impacts for pupils with protected characteristics.

Route 40 Next Steps and Mitigations

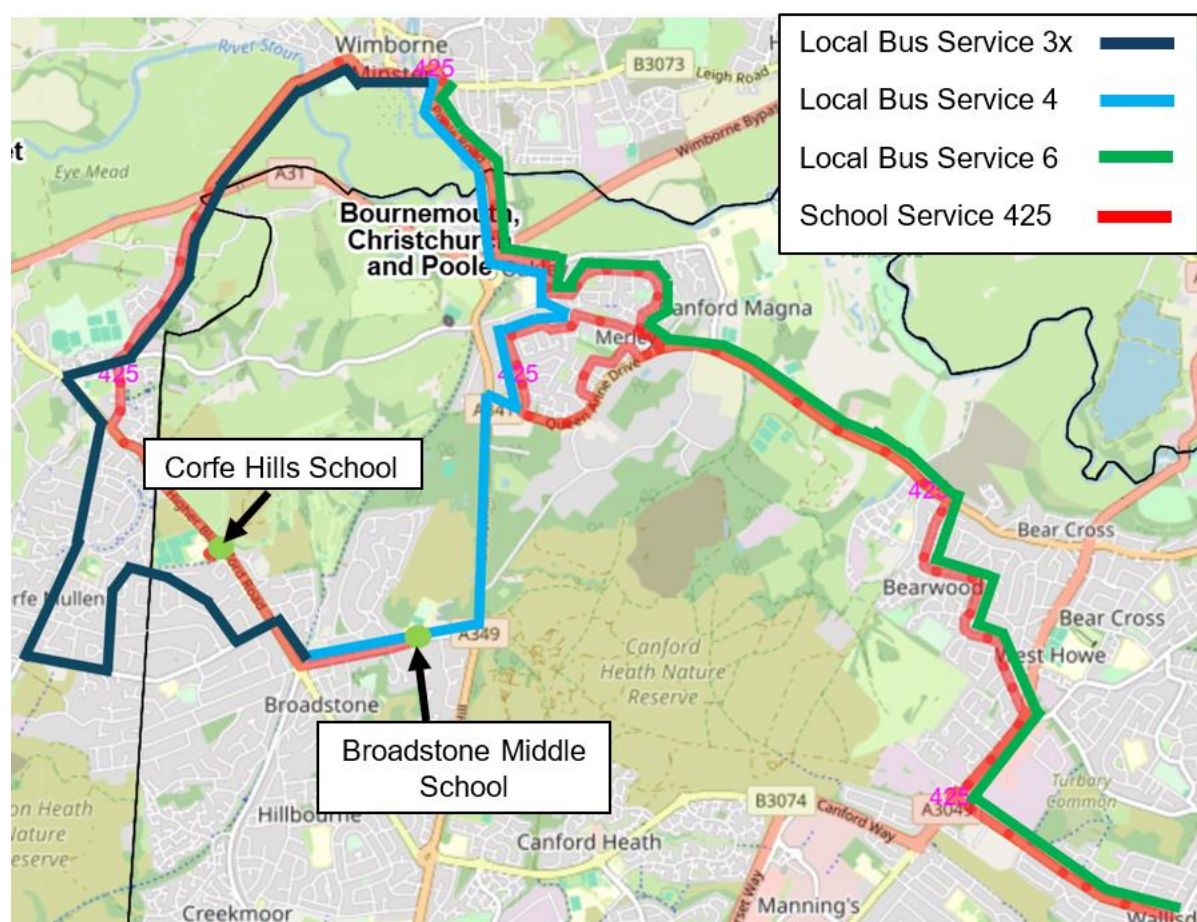
- Provide individual journey planning support
- Work with schools to identify children with vulnerable identifiers and any other concerns
- Consider appropriate mitigations for children in key year group i.e. Year 11

- Ensure that the council continues to support a diverse choice of schools for parents on the basis of faith. Faith schools are an important part of our rich offer of quality local schools and liaise with Diocesan Directors as appropriate.
- Communicate eligibility criteria as contained in the Council's policy on assistance with the costs of Home to School Transport and how to apply
- An Equalities Impact Assessment may be needed to confirm if there are any children impacted with protected characteristics.

Service 425

Service 425 operates from Wallisdown and serves Corfe Hills School and Broadstone Middle School. The service departs at 07:26 and operates via Bearwood, Merley, Wimborne, Corfe Mullen and Broadstone, arriving at Corfe Hills School at 08:23 and Broadstone Middle School at 08:35. Students at Corfe Hills School are required to be on site by 08:30 whilst those at Broadstone Middle School are required to be in school by 08:40.

The majority of the route is covered by the local bus network, although for most, there would need to be a bus change as part of their journey. For students in Wallisdown and Bearwood, there is no direct service to Corfe Mullen and Broadstone, therefore these students would need to travel to Merley/Wimborne to connect with other services. Students in the Merley and Wimborne area are better served, though there will most likely be a short walk between the bus stops and school site depending on which school and where students reside. The map below shows services available in comparison to the existing service



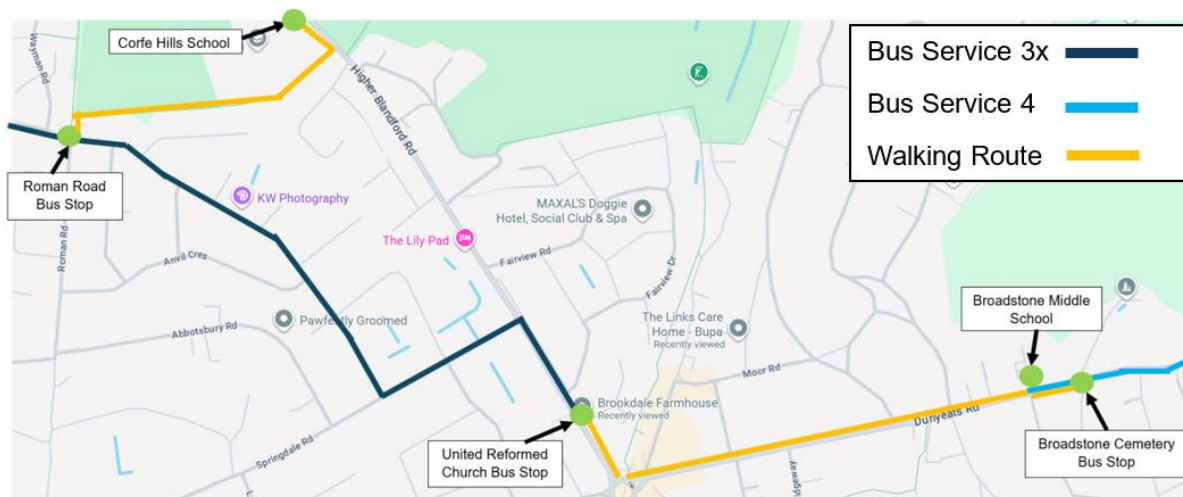
Service 425 timetable:

>>	425		425
<u>Wallisdown Roundabout, Tesco</u>	07:26	<u>Corfe Hills School</u>	15:20
<u>Mountbatten Roundabout, Fran...</u>	07:34	<u>Broadstone Middle School</u>	15:27
<u>High Howe Close</u>	07:36	<u>Merley, Willett Arms</u>	15:32
<u>Bearwood Co-op</u>	07:40	<u>Merley, Oakley Straight</u>	15:34
<u>Selkirk Close</u>	07:49	<u>The Lantern Church</u>	15:35
<u>De Montfort Road</u>	07:51	<u>Merley, Sopwith Crescent/Cock...</u>	15:37
<u>Queen Anne Drive</u>	07:53	<u>Selkirk Close</u>	15:38
<u>Egdon Drive</u>	07:55	<u>De Montfort Road</u>	15:41
<u>Merley, Sopwith Crescent/Cock...</u>	07:57	<u>Queen Anne Drive</u>	15:43
<u>The Lantern Church</u>	08:00	<u>Egdon Drive</u>	15:45
<u>Merley, Oakley Straight</u>	08:02	<u>Lynwood Drive</u>	15:47
<u>Julian's Bridge</u>	08:14	<u>Bearwood Co-op</u>	15:53
<u>Corfe Hills School</u>	08:23	<u>Wallisdown Roundabout, Tesco</u>	16:02
<u>Broadstone Middle School</u>	08:35		

Service 3x which operates from Wimborne via Corfe Mullen and Service 4 from Wimborne which operates via Merley are the most suitable alternative services. Walking distances for students will vary depending on which area they live and which school they attend.

Students in Corfe Mullen going to Corfe Hills School can disembark Service 3x at Roman Road for a 10 minute walk to school, whilst those at Broadstone Middle School can continue on Service 3x until the United Reformed Church, where it is a 15 minute walk to school.

Students in Merley can travel to Broadstone Middle School on service 4 which stops outside of the school, meaning minimal walking time for these students.



Students at Broadstone Middle School are required to be in school for at least 08:40 for registration. Students from the Corfe Mullen area can use the Service 3x which departs Wimborne at 07:43 and arrives at United Reformed Church bus stop just before 08:17 followed by the 15 minute walk to school. Students in Merley can use the Service 4 which departs Wimborne at 08:00 and arrives at the Broadstone Cemetery bus stop just before 08:27.

For students at Corfe Hills School, the only suitable option available is to Service 3x which departs Wimborne at 07:43 and arrives at Roman Road at 08:05, followed by the 10 minute walk to school. This means for any students residing in Merley they will need to make their way to Wimborne to connect with this service. This can be achieved by boarding Service 6 which departs Bournemouth at 06:45 and calls at Merley at 07:27.

<<	3x	4
<u>Wimborne Square [A]</u>	07:43	08:00
<u>Allenbourn Middle School</u>	-	-
<u>Merley, Oakley Straight</u>	-	08:10
<u>Corfe Mullen, Lockyers School</u>	07:54	-

>> 6		3x 4	
Bournemouth Square [S]	06:45	Wimborne Square [A]	07:43 08:00
Bournemouth Railway Station [2]	06:53	Allenbourn Middle School	- -
Winton Banks, Talbot Road [D]	07:00	Merley, Oakley Straight	- 08:10
Bournemouth University, Talbot...	07:05	Corfe Mullen, Lockyers School	07:54 -
Wallisdown, Talbot Drive	07:07	Hill View Post Office	08:01 -
Mountbatten Roundabout, Fran...	07:13	Highfield Estate, Lancaster Drive	08:05 -
High Howe Close	07:15	Broadstone, Broadway	08:17 08:27
Bearwood Co-op	07:19	Waterloo Road Garage	08:21 -
Merley, Brabazon Road	07:27	Wessex Gate Retail Park, Willis ...	08:27 -
Merley, Willett Arms	-	Poole Bus Station [F]	08:37 -
Wimborne Square [B]	07:37	Waterloo Estate, Milne Road	- 08:34
		Creekmoor, Borley Road	- 08:40
		Fleetsbridge, The Fleetsbridge	- 08:46
		Oakdale Library	- 08:49
		Poole Bus Station [E]	- 08:56

As mentioned, students residing in Wallisdown and Bearwood would have to make their way to Wimborne or Merley to connect with the most suitable service. The most suitable service available is the 06:45 Service 6 from Bournemouth, which passes through Wallisdown at 07:07 and arrives at Wimborne at 07:37 to allow students to connect with either 07:43 Service 3x or 08:00 Service 4.

Children's Services Comments regarding the proposed withdrawal of Service 425

The 425 serves a large area and the route travels through areas within Dorset Council (Wimborne and Corfe Mullen). The route was established as a dedicated school service funded by Children's Services to meet statutory home-to-school transport duties for pupils

entitled to free transport, at a time when demand for these journeys was significantly higher. An initial analysis of the impact of the withdrawal of this route is set out below.

Children Attending Broadstone First School or Broadstone Middle School

- There are no children attending Broadstone Middle School (or Broadstone First School) in receipt of home to school travel assistance who use the route.
- Eligibility for transport assistance for primary-aged children depends on the nearest suitable school, not the preferred school.
- There are surplus places at other local schools in the areas the route serves therefore we do not anticipate that primary-aged children attending Broadstone First or Broadstone Middle would be eligible for assistance on the grounds of distance to school.
- Details of any children who may be travelling on this route who are not eligible for home to school transport are not available.

Children Attending Corfe Hills School

- There are 4 children living in the Bearwood area who receive transport assistance in the form of a bus pass specifically for use on the 425. Two children are in Year 11 and their transport entitlement is likely to cease in July 2026, one child is in Year 10 and their entitlement is likely to cease in July 2027 and one child is in Year 9 and their entitlement is likely to cease in July 2028.
- In considering alternatives for the two children in Year 9 and Year 10, they both live in the same area and therefore they currently travel on route 425 at 07:39 in the morning, arriving at Corfe Hills School at 08:25 (journey time 46 minutes). The suggested alternative journey would be:
 - 07:15 Number 6 to Wimborne
 - 07:43 Number 3x from Wimborne to Roman Road
 - 08:05 9 minute walk to Corfe Hills School (total journey time 59 minutes)
- The suggested alternative is within the recommended maximum journey time of 75 minutes for secondary-aged children.
- Initial investigations into children living within the areas currently served by the 425 indicate that two Corfe Hills students who receive free school meals reside close to the route. Given the wide geographic area covered, it would be advisable to conduct further analysis to establish how many children are eligible for free school meals (who are currently not accessing transport assistance) and whether they may qualify for extended rights travel assistance, should the route be withdrawn at the end of July 2027.
- Note: We do not provide statutory travel assistance for Dorset resident children but there is likely to be some cross boarder movement of children accessing this route.

Route 425 Next Steps and Mitigations

- Work with schools to identify children with vulnerable identifiers and any other concerns
- Work with GIS colleagues to identify postcodes surrounding the route within a reasonable distance and investigate whether they would qualify for transport assistance under extended rights
- Include in Parent/Carer Guide to Applying for a School Place changes to available routes and explore other media for promoting awareness prior to withdrawal in July 2027.

Children's Service's Comments regarding Communication and Engagement Activity and Financial Implications with regards to Routes 40 and 425

Communications and Engagement Activity: Effective communication will be essential to help schools, families and children understand the changes and plan accordingly. Engagement with affected families and local schools is a critical part of this work and will need to be significantly stepped-up as the proposals progress. Proposed communications activity includes

- Direct engagement with affected schools and families. It will be important that services work collaboratively to agree how best this is achieved
- Journey planning support and promotion of child period tickets
- Support for walking and cycling alternatives

Financial Implications: Two of the dedicated school bus routes Route 40 and Route 425 are already funded by Children's Services because they were originally introduced to transport pupils who had a statutory entitlement to free home-to-school transport. These routes historically carried high numbers of eligible children, but usage has now fallen significantly, with only 1 eligible pupil on Route 40 and 3 on Route 425, making the services increasingly expensive to operate.

The phased withdrawal of school routes will have direct and time-limited financial implications for Children's Services. Children's Services must continue to meet the cost of these routes until they are fully withdrawn in line with the phased timetable to the end of the 2025/26 academic year for Route 40 and to the end of the 2026/27 academic year for Route 425, with £53k required in 2026/27 and a further £13k in 2027/28 to complete the transition.

Under Option 3, the main report confirms that £53,000 of the £138,000 council bus subsidy revenue required in 2026/27 relates specifically to Children's Services funding for these school routes, and that a further £13,000 will be required in 2027/28 to operate Route 425 until the end of the 2027 summer term.

Therefore, while the wider bus subsidy budget is proposed to reduce, Children's Services must continue to meet the transport costs associated with Routes 40 and 425 during the transition period until their respective end dates. This includes ensuring that eligible pupils continue to receive transport support in line with the Education Act 1996 while the phased changes take effect. These costs will therefore remain a Children's Services financial commitment across 2026/27 and into 2027/28, aligned to the timetable for the withdrawal of these school services and until the relevant academic-year commitments have concluded.

Appendix 6: Equalities Impact Assessment Conversation/Screening

Equality Impact Assessment: Conversation Screening Tool

[Use this form to prompt an EIA conversation and capture the discussion. This completed form or if needed, a full EIA report (form 3) will be published as part of the decision-making process **Please delete prompts before publishing**

<p>What is being reviewed?</p>	<p>BCP Council agreed to a full review of all subsidised local bus service contracts ahead of a planned proposed commencement of the withdrawal of the Bus Subsidy budget starting in 2026/27 in accordance with the council's Medium Term Financial Plan. The Department for Transport (DfT) recommended a full review of the subsidised bus network would be required to potentially unlock Bus Service Improvement Plan (BSIP) revenue funding for bus subsidy. Most bus routes across BCP run without extra financial help from the council. However, some routes with fewer passengers, such as evening and Sunday services or those that serve areas away from the busy roads, need financial support (subsidy) to keep running.</p> <p>The council supports 24 local bus service contracts which can be categorised as follows:</p> <p>6 x School Routes 8 x Monday to Saturday Daytime Routes 5 x Monday to Saturday Evening Routes 5 x Sundays Routes</p> <p>The review comprised of on-bus passenger surveys; analysis of passenger boarding information supplied by the bus operator, morebus; discussions with morebus; and a 'Have your say' public consultation which ran from 9 July to 18 August 2025.</p> <p>Cabinet will be considering the results of this review at its meeting on 4 February 2026. Following this consideration, Cabinet may recommend to Council reductions in bus subsidy funding which could potentially result in the withdrawal or reduction of some services.</p> <p>Post-consultation negotiations with the principal bus operator, Morebus, and discussions with the Bus Reform Team at the Department for Transport, have resulted in recommendations that would reduce the impact of the withdrawal of BCP Council subsidy.</p>
<p>What changes are being made?</p>	<p>The potential outcome of the review is that with effect from the summer 2026 timetable change (23 May), some</p>

	services could be withdrawn; some may be reduced in frequency or route; and some services could be combined together.
Service Unit:	Transport and Sustainable Travel
Participants in the conversation:	John McVey – Sustainable Transport Manager Nick Phillips – Sustainable Travel Operations Team Leader Kevin Brolan – Senior Transport Officer Richard Barnes – Service Unit Equality Champion and part of Sustainable Transport Policy Team.
Conversation date/s:	9 September 2025; 1 October 2025; 8 January 2026; 15 January 2026
Do you know your current or potential client base? Who are the key stakeholders?	<p>The Enhanced Partnership (EP) Board which includes the principal local bus company operating in the BCP Council area, Morebus, as well BCP Council Members and Officers.</p> <p>People that currently travel by bus in the BCP Council area, both locals and visitors and future bus users.</p> <p>Bus Passenger representative groups/organisations.</p> <p>Schools, business and organisations in the locations where changes to bus routes may impact on access.</p> <p>Organisations and support groups who could be impacted by people no longer having access to bus services – due to isolation and linked detriment to mental health and wellbeing.</p>
Do different groups have different needs or experiences?	<p>Information is available regarding the equality profile of people that currently use buses.</p> <p>Bus use is particularly common for those aged 17-20, aged over 70, for women and girls, most ethnic minority groups and people on lower incomes (National Audit Office).</p> <p>Children and young people use school buses and therefore they may be disproportionately impacted on school days/at school times if their school bus route is changed or withdrawn.</p> <p>As bus use is highest for over 65s, older people may be disproportionately impacted by bus routes being changed, merged, or removed. This may be because they can no longer drive or own a car. Bus routes being removed could cause them to no longer be able to get out and about,</p>

	<p>preventing them from socialising or grocery shopping and making access to medical appointments more difficult.</p> <p>People with a disability are more likely to use a bus, and so if their bus route is changed or withdrawn, they may find that they can no longer access the services they need, socialise with people, or get to appointments.</p> <p>A Bournemouth Council travel survey undertaken October 2018 to January 2019 showed that 60% of respondents had used a bus within the last 12 months. Locally bus use was for age – highest for over 65s and under 24s; disability – disabled people were more likely to travel by bus than people without a disability; ethnicity – ‘White Other’ and BME people were more likely to use buses than white British people; sexual orientation – all other sexual orientations were more likely to travel by bus than heterosexual people; religion – all other religions were more likely to travel by bus compared to Christians and residents from more deprived areas were more likely to use buses.</p> <p>A BCP Council residents survey from September 2021 suggested that younger age groups are more satisfied with local bus services, particularly the 16-24 age groups. Those aged 35-44 are less satisfied. This could be as car ownership is higher compared to younger people so with more of this group having a choice of transport, they are less satisfied.</p> <p>Whether a household has a car available may result in a different need or experience. This could be linked to socio-economic conditions, with households from less prosperous areas having lower levels of car ownership and more likely to rely on bus services for transport needs.</p> <p>A BCP Council survey ‘Bus Back Better’ from 29 November 2021 to 7 January 2022 to inform priorities for the Enhanced Partnership (statutory partnership between the Local Transport Authority and the bus operators), identified safety and security concerns travelling on buses and waiting at stops and interchanges, particularly Poole Bus Station. These concerns are likely to be more prevalent amongst certain protected groups including women and some ethnic groups.</p> <p>There are not any identifiable or known impacts specific to Marriage and Civil Partnership, Gender reassignment, human rights, the Armed Forces or those with caring responsibilities.</p>
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	<p>A Transforming Travel Survey (August 2022) identified:</p> <ul style="list-style-type: none"> • Respondents aged 18-24 are significantly more likely to frequently travel by bus than respondents aged 25-64 • Respondents aged 65+ are significantly more likely to frequently travel by bus than respondents aged 35-64 • Respondents aged 18-24 are significantly less likely to use the bus 'infrequently' or 'hardly ever' than respondents aged 25-64 • BAME respondents are significantly more likely to choose 'frequently' and 'occasionally' than White British respondents • Respondents with no disabilities are significantly more likely to travel by local bus infrequently than respondents with disabilities • Retired respondents are significantly more likely to frequently travel by bus than respondents in employment • Respondents in employment are significantly less likely to travel by bus occasionally than unemployed, retired and economically inactive respondents • Respondents in IMD quintile 2 are significantly more likely to frequently travel by bus than respondents in IMD quintiles 3-5 • Mosaic groups with above average frequent bus use include group N – Urban Cohesion, O – Rental Hubs and I – Family Basics • Mosaic groups with the highest proportions of respondents who hardly ever use a bus are Group E – Senior Security, L – Vintage Value and D – Rural Reality <p>The 2024 Transport Focus 'Your Bus Journey' survey of bus users in Bournemouth, Christchurch and Poole in 2024 identified that out of over 1,000 respondents:</p> <ul style="list-style-type: none"> • 53% identified as Female, 43% identified as Male, 3% preferred not to say, 0% preferred to self-describe • 40% were aged 26 – 64, 29% were aged 16 – 25, 29% were aged over 65, 2% preferred not to say. • 32% stated they were affected by a physical or mental health condition lasting or expected to last over 12 months. • 77% described their ethnicity as White, 7% described as Asian, 6% described as Black, 6% preferred not to say, the remaining 4% described as Other. • 40% of respondents did not drive, 47% did say they had a car available to them, however 28% of these respondents said they preferred not to drive.
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	<ul style="list-style-type: none"> 47% of respondents have access to a car through others at least “some of the time”. 26% of respondents did not have anybody available with a car to assist
Will this change affect any service users?	<p>Yes.</p> <p>The proposed changes could see services reduced in frequency, reduced in route and destinations served, or withdrawn. Some services may be combined together.</p> <p>The proposed changes will impact on choices and routines of some service users who may find they will no longer be able to catch their usual bus and so will need to find alternative arrangements. The arrangements could include (but not limited to):</p> <ul style="list-style-type: none"> - An alternative bus service from the same bus stop, but require changing to another service along the route to reach desired destination. - An alternative bus service from an alternative bus stop. - Use of cycle (private or micromobility hire) to reach destination or connect with alternative bus service. - Use of private car including reliance on friends/relatives. - Walking or wheeling depending on journey distance and ability. - Not travelling and relying on home visits/deliveries, unless an emergency. <p>The recommended changes will result in the majority of routes remaining, though some of these will be with changes to routes and timetables, including some reductions. The main impact will be on passengers using two of the six dedicated school buses as these are recommended to be withdrawn at the end of the Summer Term 2026 (Route 40) and end of the Summer Term 2027 (Route 425). For each of the school services affected, an analysis has been undertaken to identify alternative journey and ticketing options on the local bus network, as well as the potential for walking and cycling.</p> <p>Changes may also impact into the wider community including to those not directly using these services. Potential positive and negative impacts are outlined in the sections below.</p>
<p>[If the answer to any of the questions above is ‘don’t know’ then you need to gather more evidence. The best way to do this is to use forms 2 and 3. <i>*Please delete prompts before publishing*</i>]</p>	

<p>What are the benefits or positive impacts of the change on current or potential users?</p>	<p>Where services are combined together, this could provide new transport links for residents to previously unserved destination. This would be dependent on the services combined, and whether these changes are seen by residents as beneficial to them.</p> <p>The review and outcomes from the consultation has assisted in providing information about up-to-date use of the supported bus network, enabling recommendations for the routes receiving financial support to better fulfil current user requirements. There hasn't previously been a full review undertaken of the entire supported bus network.</p>
<p>What are the negative impacts of the change on current or potential users?</p>	<p>The alternative provisions may be less convenient for all service users including increased walking to the bus stop, less frequent buses, slower routes or requiring changing services along the journey. These will have varying impacts depending on personal needs and circumstances of service users. The agreement by morebus to operate the evening and Sunday routes on a commercial basis (though with some timetable revisions) and the authorisation from the DfT to use Bus Grant revenue allocation (subject to conditions) will significantly reduce the impact on most passengers.</p> <p>Passengers using the two dedicated school buses proposed for withdrawal and still choosing or needing to travel by bus, are likely to have journeys that take longer and involve a change of buses and/or longer walks to and from the bus stop. There will also be fare implications for these passengers as different types of tickets will be needed (e.g. day ticket or season ticket). Some will need to pay more though others may find their fares are cheaper.</p> <p>Regular commuters on bus services including active workers and students may have to plan their journeys in consideration of the potential increase in both 'first mile' and 'last mile' elements as they have to travel further to connect with an alternative service (this includes instances where interchanging between services is required). This requires increased commuting time which can lead to increased disruption in instances where services are unreliable, which can impact on a service users work and education prospects. This added disruption will also impact how service users connect with key services such as medical appointments and local doctors' surgeries or at key hospital facilities.</p> <p>Having to use alternative bus services including</p>

	<p>interchanging between services can have a socio-economic impact, with users having to purchase additional tickets, (such as periodic or cross network tickets) instead of being able to purchase a 'single' or 'return'. This can increase pressure on personal budgets and can either lead to users finding alternative work/education provision with less reliance on commuting or can lead to users changing how they spend money on other items such as food and clothing.</p> <p>The potential for increased 'first mile' or 'last mile' elements of a passenger's journey to connect with alternative services can be increasingly difficult for older people and those with a disability, particularly mobility difficulties, and even more so if changing between bus services is required as part of this new journey. This can prove especially difficult for those with limited mobility to the extent that it may not be possible for them to undertake these longer journeys independently. This loss of independent living could lead to a decline in both physical and mental health.</p> <p>The additional journey to alternative bus services may make some groups such as women, disabled people or elderly feel less safe depending on how well the route is lit at night and whether there are any anti-social concerns in the area. This again can severely limit employment opportunity as well as social integration within the community.</p>
Will the change affect employees?	<p>Many employees and others in their households will use buses, to get to/from work, for work business travel and general personal travel. The BCP employee travel survey 2022 stated that 7% sometimes used a bus to travel to/from work, with bus as the main mode for 4%.</p> <p>The majority of bus routes are operated on a commercial basis and are therefore unaffected by this review. However, it is possible that some employees would be impacted by any reductions or withdrawals.</p>
Will the change affect the wider community?	<p>Yes. Some passengers (most likely to be school children using the two dedicated school buses proposed for withdrawal) could find they can no longer catch their usual bus and will either need to find an alternative route, an alternative mode of travel, or not travel at all. Some passengers will find they still have a bus but it is less convenient (longer walk to bus stop; less frequent; slower route; need to change services along route).</p> <p>Where households have access to a car – should a bus service no longer be available, this could lead to additional replacement car journeys adding to congestion on our roads and increasing pollution with linked detrimental</p>

	<p>health and environmental impacts. This is contrary to the BCP Council Corporate Strategy ambition to tackle climate change through sustainable policies and practice.</p>
<p>What mitigating actions are planned or already in place for those negatively affected by this change?</p>	<p>Negotiations with Morebus have resulted in their agreement to operate the evening and Sunday routes on a commercial basis and minimum impact on passengers is expected. In addition, the authorisation from the DfT to use Bus Grant revenue allocation (subject to conditions) will significantly reduce the impact on most passengers.</p> <p>Alternative journeys for school children currently using the two dedicated school buses proposed for withdrawal and transferring to the general bus network have been investigated. This has concluded that there are options available, albeit involving a change of bus and/or a longer walk to/from the bus stop.</p>
<p>Summary of Equality Implications:</p>	<p>The profile of people that use buses, from both national and local evidence, are groups the Equality Act is intended to benefit by advancing equality of opportunity between people who share a protected characteristic and those who do not. Much older, much younger age groups, people with a disability, women, other ethnic groups, other religions, other sexual orientations and residents from more deprived areas are all more likely to use buses, compared to others in their protected groups.</p> <p>Any deterioration in service following a decision to reduce or withdraw subsidised bus routes will disproportionately impact on these groups unless adequate mitigation actions can be put in place.</p> <p>Negotiations with Morebus have resulted in their agreement to operate the evening and Sunday routes on a commercial basis and minimum impact on passengers is expected. In addition, the authorisation from the DfT to use Bus Grant revenue allocation (subject to conditions) will significantly reduce the impact on most passengers.</p> <p>Alternative journeys for school children currently using the two dedicated school buses proposed for withdrawal and transferring to the general bus network have been investigated. This has concluded that there are options available, albeit involving a change of bus and/or a longer walk to/from the bus stop.</p>

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CABINET



Report subject	School Admissions Arrangements 2027/28
Meeting date	4 February 2026
Status	Public Report
Executive summary	<p>BCP Council is responsible for administering admission arrangements for its community and voluntary controlled schools. There is a legal requirement to determine the arrangements annually as described in the School Admissions Code 2021 and associated legislation.</p> <p>The local authority must also formulate and publish a scheme to coordinate the admission arrangements for all publicly funded schools within their area for the 2027/28 academic year.</p> <p>A public consultation on the proposed 2027/28 admission arrangements was held on from 10 November 2025 until 22 December 2026. The proposed change is a reduction to the Published Admission Number at Burton CE Primary School to reflect the broader trend of fewer families seeking school places in the area due to falling birth rates.</p> <p>It is recommended that the arrangements are determined by council members.</p>
Recommendations	<p>It is RECOMMENDED that:</p> <p>(a) Cabinet consider any comments from the consultation and from Children's Services Overview and Scrutiny Committee concerning the Schools Admissions Arrangements 2027/2028 for community and maintained schools; and</p> <p>(b) Cabinet support the determination of the arrangements as set out in Appendix 1 and 2 of this report.</p>
Reason for recommendations	<p>BCP Council is legally required to determine admission arrangements for the 2027/28 academic year for all maintained schools for which it is an admission authority and to agree coordinated admission arrangements for all admission authorities in the area. Arrangements must be determined by BCP Council by 28 February 2026.</p>

Portfolio Holder(s):	Councillor Richard Burton – Portfolio Holder, Children’s Services
Corporate Director	Cathi Hadley – Corporate Director, Children’s Services
Report Authors	Lisa Linscott – Director of Education and Skills, Children’s Services
Wards	Council-wide
Classification	For Decision

Background

1. The Council and schools that are deemed to be an ‘admission authority’ are required each year to set arrangements explaining how and when they will decide to offer school places.
2. The Council is required to have an admissions policy for its four maintained community and voluntary controlled primary schools located in Christchurch.
3. The Council must also set an administrative scheme setting out for parents and schools how the application and offer process will be co-ordinated.
4. Reductions in Published Admission Numbers (PANs) must be publicly consulted on in accordance with the requirements detailed in the School Admissions Code 2021.

Admission arrangements and published admission numbers

5. The admissions arrangements must explain how to apply for a school place and, once an application is received, how it will be processed. The policy must contain clear oversubscription criteria should there be more applications than there are places available. The number of places available at a normal point of entry for each school, the published admission number (PAN), must also be set and included in the policy for parents.
6. The proposed admissions policy is attached at appendix one. In addition to the reduction in PAN, additional clarification for the oversubscription criterion for children of school staff has been provided and minor date alterations have been made. All other areas of the arrangements (catchments, supplementary information form, and the policy for requests for applications for a place in a different year group to that determined by date of birth, including delayed admission to reception for summer born children) remain the same.
7. The proposed published admission numbers (PAN) for each of the maintained primary schools are detailed at the end of appendix one. The proposed change that required consultation is the reduction in PAN at Burton CE Primary School.
8. Burton’s school governing body has requested a reduction in PAN. Reducing the school’s intake from 45 to 30 will enable the school to organise classes efficiently. It also reflects the broader trend of fewer families seeking school places in the area due to falling birth rates.

Coordinated Scheme

9. The Council is required under paragraph 2.22 of the Department for Education's School Admissions Code 2021 to set a coordinated scheme for the processing of school applications for entry to school in September 2027.
10. The scheme recommended and attached at appendix two is a single scheme for the whole of the Bournemouth, Christchurch and Poole area. The scheme is in principle the same as that set by the Council for the 2026/27 academic year with minor date alterations.

Consultation

11. The statutory period for consultation required by the School Admissions Code 2021 is a minimum of six weeks. The admission arrangements were consulted on from 10 November 2025 until 22 December 2026.
12. The consultation was available on Have Your Say and the School Admissions webpages. All schools in the Relevant Area, neighbouring local authorities and relevant dioceses were notified. Schools and early years settings were asked to inform families about the consultation whilst social media and BCP Council newsletter emails also publicised it.
13. No responses were received regarding the Council's proposed admission arrangements during the consultation period.

Options Appraisal

14. The existing arrangements cannot continue as the Council has an annual statutory requirement to determine the admissions policy. Taking no action is therefore not an option.
15. The reduction in PAN supports Burton Primary School to manage its resources more effectively and deliver education effectively.
16. It is recommended that the Council determine the arrangements and the coordinated scheme.

Summary of financial implications

17. The admissions function is funded from the Dedicated Schools Grant (DSG). Therefore, there are no wider revenue budget implications to the Council. The recommendations set out above are intended to be accommodated within the existing budget allocated from within the DSG for this purpose.

Summary of legal implications

18. The Council must determine the coordinated scheme, admission arrangements and published admission numbers no later than 28 February 2026.
19. If no action is taken, the Council will not meet its statutory duty to have admission arrangements which meet the requirements of the School Admissions Code 2021.

Summary of human resources implications

20. There are no anticipated changes to human resources from determining the policy and coordinated scheme.

Summary of sustainability impact

21. BCP Council is committed to encouraging children and young people attend their nearest or catchment school.

22. The draft admissions policy includes oversubscription criteria that gives high priority to children living in their school's catchment area. Attendance at a local school provides families with greater opportunity to travel to school on foot or by cycling, scooting or using public transport in line with the Transforming Travel agenda.

Summary of public health implications

23. Ensuring families can apply for a school place supports the health and wellbeing of children and young people by enabling them to attend school.

Summary of equality implications

24. An equality impact assessment screening tool was completed and is attached at appendix three.
25. The admissions policy and co-ordinated scheme will be accessible online for all BCP Council residents and paper copies will be provided on request.
26. School applications will be assessed using the policy oversubscription criteria. Where the child/young person and/or their family have additional needs or requirements these will be considered in line with the policy.
27. Families will have the opportunity to access an independent appeal process if they are unhappy with the school offered.

Summary of risk assessment

28. If BCP Council do not determine admission arrangements for its community and voluntary controlled schools by 28 February 2026, the Council will not have met its statutory duty as defined in the School Admissions Code 2021 and the Department for Education may impose arrangements upon the Council.

Background papers

[School Admissions Code](#) – Published works

[School Standards and Framework Act 1998](#) – Published works

Appendices

Appendix one – BCP Council admissions policy 2027/28

Appendix two – BCP Council coordinated scheme for 2027/28

Appendix three – Equality impact assessment conversation screening tool



Community and voluntary controlled infant, junior and primary schools admissions policy 2027-2028

Admissions policy 2027-28

The admission authority for all community and voluntary controlled mainstream schools in the Bournemouth, Christchurch and Poole Council area is the local authority.

This policy applies to applications for school places starting in September 2027 and should be read in conjunction with the parents' guide available at bcpcouncil.gov.uk/schooladmissions from 12 September 2027.

Children with an education, health and care plan (EHCP) issued by a local authority naming a school where a child should receive their education will be admitted to that school before preferences are considered for admission in September.

Where there are more applications than places available the following criteria will be used, in numerical order, to decide the priority list for the offering of places up to the school's published admission number:

1. "Looked after children" or "previously looked after children" (note one) including children who appear to have been in state care outside of England (note two).
2. Children who BCP Council accepts have an exceptional medical or psychological need and where there is a need for a place at one specific school (note three).
3. Children who live in the school's catchment area who have a sibling who is already on the roll of the school and will continue to attend the school at the time of admission (note four).
4. Children living within the school's catchment area who are attending a recognised feeder school and are on that school's roll at the time of application. This applies to Mudeford Infant and Junior Schools only.
5. All other children who live in the school's catchment area.
6. Children who live outside the school's catchment area who have a sibling who is already on the roll of the school and will continue to attend the school at the time of admission (note four).
7. Children living outside the school's catchment area who are attending a recognised feeder school and are on that school's roll at the time of application. This applies to Mudeford Infant and Junior Schools only.
8. Children living outside the school's catchment area and whose parents wish them to attend a Church of England voluntary controlled school on denominational grounds (note five). This applies to Burton C of E Primary School only.

9. Children of staff where the member of staff has been employed for two or more years at the school applied for at the time the application for admission is made or who have been recruited to a vacancy to meet a demonstrable skills shortage as at the date of application (in year) or relevant closing date under the local authority co-ordinated scheme (normal year of entry) and who still intend to be employed at the school at the time of the child's admission (note six and note seven).

10. All other children who live outside the school's catchment area.

If a school is oversubscribed in any of the categories above, children in the oversubscribed category who live closest to the school will be given priority (note eight).

If the distance measurement is equal for two or more applicants (excluding children of multiple birth, please see below), the place will be allocated by the drawing of lots. The person drawing the names will be an officer within BCP Council who is not involved in the school admissions process.

Please ensure you read notes one to eight and the remainder of this policy for further information.

Admission arrangements

Admission will be in accordance with the agreed scheme for coordinated admission arrangements 2027-28.

Starting reception in 2027-28

All children can start in reception on a full-time basis in September 2027. Where parents and carers wish, children may attend part-time until later in the school year but not beyond the point at which they reach compulsory school age. Parent and carers should discuss this with the headteacher. The final decision will rest with the parent or carer of the child.

Delayed or deferred start

For children born between 1 September and 31 March, parents and carers can delay their child's start date until later in the school year but not beyond the point at which they reach compulsory school age (i.e., by the start of the term following their fifth birthday). For children born between 1 April and 31 August, parents can also delay their child's start date; but not beyond the beginning of the final term of the school year (i.e., the term that starts after the Easter/Spring holidays).

The school place offered cannot be delayed until the following academic year – it must be taken-up in the academic year for which it is offered. Parents and carers who do not take-up the offer of a place during the reception year will need to re-apply for a school place the following year. Places offered but not taken-up by the beginning of the final term (i.e., the term that starts after the Easter/Spring holidays) will be withdrawn.

If parents and carers want to apply for the following year, they would normally apply for a place in year one. Parents and carers need to be aware that year one in the school they were previously offered could be full at this stage.

Applications for a place in a year group different to that determined by date of birth, including delayed entry to reception for summer born children

Applications for children to be educated in a year group different to that determined by their date of birth, including delayed admission to reception for summer born children, will be considered on their individual merits by a specialist panel.

Details of what you need to do to apply for a different year group can be found in the policy document “Policy for responding to parental requests for admission to community and voluntary controlled schools to a year group different to that determined by their date of birth, including delayed admission to reception for summer born children” available online at bcpcouncil.gov.uk/schooladmissions or from the school admissions team.

Parents and carers considering this should contact BCP Council at the earliest possible opportunity (preferably before 30 November 2026) to ensure a decision is made before the national closing date for applications.

Excepted pupils for infant classes (Years R, 1 and 2)

Infant classes must not contain more than thirty pupils with a single schoolteacher. Additional children may be admitted under limited exceptional circumstances. These children will remain an ‘excepted pupil’ for the time they are in an infant class or until the class numbers fall back to the current infant class size limit. The excepted children are:

- children admitted outside the normal admissions round with education, health and care plans (EHCPs) specifying the school
- looked after children and previously looked after children admitted outside the normal admissions round
- children admitted after initial allocation of places, because of a procedural error made by the admission authority or local authority in the original application process
- children admitted after an independent appeals panel upholds an appeal
- children who move into the area outside the normal admissions round for whom there is no other available school within reasonable distance
- children of UK (United Kingdom) service personnel admitted outside the normal admissions round
- children whose twin or sibling from a multiple birth is admitted otherwise than as an excepted pupil
- children with SEND who are normally taught in a SEND unit attached to the school, or registered at a special school, who attend some infant classes within the mainstream school.

In year fair access

All the admission authorities in BCP Council have established an in year fair access protocol. The purpose of the protocol is to ensure that – outside the normal admissions round – unplaced children, especially the most vulnerable, are provided with a place at a suitable school as quickly as possible.

Cases are considered by a panel comprising Headteachers and/or their representatives. When seeking to place a child, the panel will consider all schools in a fair, equitable and consistent manner. Decisions of the panel may mean that individual schools admit children above the published admission number. Admission authorities will not normally be asked to admit a child to an infant class where there are already thirty children in the class.

In year admissions – looked after children

A looked after child may be admitted to a school above the admission number if it is felt by the local authority that a particular school is the most appropriate placement to meet the needs of the individual child.

Home address

The home address where a child lives is a residential property that is the child's main or only address during term time.

Applicants can be asked to provide additional evidence to verify addresses and/or other details provided. It is at the discretion of the local authority what evidence is required (evidence may include, but is not limited to, child benefit, GP (general practitioner) registration, evidence of home ownership/tenancy etc.). The final decision on the home address of a child will be made by BCP Council. If any information supplied by an applicant is judged by the local authority to be fraudulent or intentionally misleading, BCP Council may refuse to offer a place, or if already offered, may withdraw the offer.

Applications from separated parents and carers

Only one application and one address can be accepted for each child. Where parents and carers are separated, it is essential that agreement is reached by both parties about which schools are named on the application form by the closing date.

The local authority is unable to mediate in any dispute between parents. If parents are unable to agree lines of communication between themselves on issues involving their child, they may wish to seek independent legal advice and explore other options. These might include referring the matter to non-court dispute resolution, such as mediation.

If parents cannot agree through mediation, they should resolve the issue through the court system, for example a 'Specific Issues Order' which specifies which parent has responsibility to make decisions on school preferences.

If more than one application is submitted for the same child, or if the admissions team

becomes aware that the application was made without the agreement of all parties with parental responsibility, the application will not be processed. A new application will be required, and confirmation of agreement must be provided by all parties involved. If this single application is submitted after the closing date, it will be treated as a late application.

If a parent signs the declaration to say that they have parental responsibility and indicates that all others with parental responsibility also consent to the application, and BCP Council subsequently is informed that this was incorrect, this may result in the application not being processed. In the event that a place has already been allocated, that place may be withdrawn in accordance with the statutory School Admissions Code, which allows for withdrawal of places offered in error or obtained through a fraudulent or intentionally misleading application. Any decision to continue processing or to withdraw an application will be made based on the specific circumstances of the case, with the child's safeguarding and welfare as the highest priority.

Where a child spends part of their week with one parent or carer and part with the other, only one address can be provided. This must be the address at which the child spends most of their time during term time.

If a child spends equal time with each parent, both parties must also come to agreement about which address to use on the application, as well as the schools and preference order.

Changes of address

When applying for point of entry, BCP Council will not accept a change of address once the National Closing Date has passed.

The National Closing Date for point of entry year groups (Reception and Year 3) is 15 January 2027. This means if your moving date is after 15 January 2027, we will use your old address to categorise your application. You will need to tell us your new address so we can update your child's record.

If you move house after you have submitted your application but before the National Closing Date, you **must** inform us **by** the 15 January 2027 to ensure your application is considered from your new address.

Alternatively, a house move occurring by the closing date, also includes:

- (if purchasing) exchange of contracts occurring on or before the closing date;
 - (if renting) signed tenancy agreement which commences on or before the closing date
- This information **must** be provided **by 15 January 2027**.

Application for children of multiple births

If there are insufficient places to accommodate all the children of a multiple birth (i.e., twins, triplets etc.) in any year group and one child can be admitted, the other siblings of the multiple birth will be admitted over the school's published admission number. If it is in an infant class (Years R, 1 and 2) the additional children over the published admission number will be considered as excepted pupils for the entire time they are in an infant class at the school or until the class numbers fall back to the infant class size limit in accordance with the school admissions code.

Waiting lists

BCP Council maintains waiting lists for its schools. When a child is added, the waiting list must be ranked again in line with the oversubscription criteria. Priority will not be given to children based on the date their application was received or when their name was added to the waiting list.

Children who have been refused a place will automatically be added to the waiting list for the relevant academic year. If parents or carers wish for their child to remain on the waiting list beyond that academic year, a new application must be submitted from 1 June for the following year.

Being on a waiting list does not guarantee a school place. A child's position may change as new applications are received, or others are removed.

Appeals

If the local authority is unable to offer a place at a school that has been applied for, the parent or carer has the right to appeal to an independent appeals panel. Details will be included in the letter refusing the school place. The decision of the appeal panel is binding on all parties.

Notes

1. A "looked after child" means any child who is in the care of a local authority in accordance with Section 22 (1) of the Children Act 1989. A child who was "previously a looked after child" means a child who after being looked after, became subject to an Adoption Order under the Adoption Act 1976 or under Section 46 of the Adoption and Children Act 2002, a Residence Order or Child Arrangement Order under Section 8 of the Children Act 1989 or Special Guardianship Order under Section 14A of the Children Act 1989. Applicants can be asked to provide additional evidence to verify the previously looked after status of a child. It is at the discretion of BCP Council what evidence is required. The final decision will be made by BCP Council. If any information supplied by an applicant is judged to be fraudulent or intentionally misleading, BCP Council may refuse to offer a place, or if already offered, may withdraw the offer.
2. A child is regarded as having been in state care in a place outside of England if

they were accommodated by a public authority, a religious organisation, or any other provider of care whose sole purpose is to benefit society. Applicants can be asked to provide additional evidence to verify the previously looked after status of a child. It is at the discretion of BCP Council what evidence is required. The final decision will be made by BCP Council. If any information supplied by an applicant is judged to be fraudulent or intentionally misleading, BCP Council may refuse to offer a place, or if already offered, may withdraw the offer.

3. If applying under medical or psychological grounds, written advice from an NHS consultant (for medical grounds), or an NHS consultant psychiatrist (for psychological grounds) that documents the child's medical or psychological needs must be included with the application. Children will only meet this criterion if the school(s) named on the application form is assessed by BCP Council to be the only school(s) that can meet any specific medical or psychological needs identified. The final decision whether an application can be considered using this criterion will be made by BCP Council.
4. "Sibling" means:
 - a full brother or sister who lives with one or both parents or carers in the same property during the school week.
 - a half-brother or half-sister who lives with one or both parents or carers in the same property during the school week.
 - an adoptive brother or sister who lives with one or both parents or carers in the same property during the school week.
 - a foster brother or sister who lives with one or both parents or carers in the same property during the school week.
 - non-blood related children who, together, all live with one or both parents or carers in the same property during the school week.

For Mudeford Community Infants School the sibling link will apply if the sibling is on roll and will continue to attend Mudeford Junior School at the time of admission and vice versa. For those applying for a place at Mudeford Infant School, this includes pupils who have a sibling in Year 2 and have applied for Year 3 at Mudeford Junior School.

5. To qualify for consideration under this category for Burton CE Primary School, parents and carers will need to show that at least one adult family member and the child to whom the application relates to have been attending their local church at least once a month for a minimum of a year prior to the closing date for applications. The application must also be supported by a supplementary information form signed by the vicar/priest/minister or leader of the church confirming this.

If during the period specified for attendance at worship the church has been closed for public worship and has not provided alternative premises for that worship, the requirements of these admissions arrangements in relation to attendance will only apply to the period when the church or relevant place of worship or alternative premises have been available for public worship.

6. Staff are defined as all teaching and support staff employed at the preferred school. 'Children of staff' refers to situations where the staff member is the natural parent, the

legal guardian, or a resident step-parent. If applicants wish to be considered under this criterion, then a letter from the headteacher confirming the criterion applies to the applicant must be provided at the time of application.

7. A demonstrable skill shortage refers to a post which the school has had difficulties fulfilling. For priority to be given on this basis, the school must have taken part in a recruitment drive to fill the post where the post was not filled after two attempts at recruitment have been made.
8. The distance between the child's home and preferred school will be determined by the shortest straight-line measurement calculated using the local authority's geographical information system in use at the time of allocation. The system at the time of setting the policy is Servelec Synergy and it takes the measurement between the address mapping points of the school and the applicant's home. Please note that eligibility for school transport assistance is based on walking distance measurements.

Published admission numbers 2027-28

School Name	Published Admissions Number 2027/28
Burton CE Primary School	30
Mudeford Community Infant School	60
Mudeford Junior School	66
Somerford Primary School	30

BCP Council School Admissions and Transport Team

school.admissions@bcpcouncil.gov.uk

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Admission Arrangements Coordinated Scheme 2027-28

Coordinated Admissions Scheme 2027-28

All schools in Bournemouth, Christchurch and Poole together with the Local Authority have, in accordance with statutory requirements, agreed to coordinate the main entry admission and transfer process for 2027-28. The agreed scheme enables an application to be made on a single application form.

The coordinated scheme applies to the following admission points of entry:

Point of Entry	Apply from:	National Closing Date (Applying on Time)
Entry in Reception at all First, Infant Primary and All-Through schools	1 November 2026	15 January 2027
Entry into Year 3 at Junior schools	1 November 2026	15 January 2027
Entry into Year 5 at Broadstone Middle School	1 November 2026	15 January 2027
Entry into Year 7 at all secondary schools with the exception of Corfe Hills School and LeAF Studio School	1 September 2026	31 October 2026
Entry into Year 9 at Corfe Hills School and LeAF Studio School	1 September 2026	31 October 2026

BCP Council will coordinate with other local authorities to ensure that a child receives only a single offer of a school place. It will seek to offer the highest preference able to be agreed subject to the receipt of information in sufficient time and the other local authorities' schemes providing for this.

Parents and carers should complete an application and name four different schools in the order they would like their child to attend. Parents and carers must submit their application to their home local authority by the published closing date specified in the table above.

Preferences on faith grounds

Parents and carers expressing a preference on faith grounds must check the relevant school admissions policy to find out how to provide evidence of religious faith and practice. Parents and carers may be required to complete a supplementary information form and submit the form before the published closing date. Where baptismal evidence is required, parents and carers must check how this is provided to the school. All relevant evidence must be submitted before the published closing date. The supplementary information forms can be downloaded from the BCP Council website or from the relevant school website.

Changes to or applications made after the national closing date

Applications or any change of preference received after the national closing date will be considered as a late application unless otherwise specified within the school's admissions policy.

Applications that are considered late will be processed after all on-time applicants have been notified of their result. Late applications received before the published late closing date will be processed in accordance with the timetable (see below).

Any applications received after the published closing date for late applications will be processed as quickly as possible after the timetable (see below) has been completed. Once processed, they will be immediately added to the waiting lists if a place is not available.

Living or applying for schools outside of BCP Council area

Parents and carers who live outside of the BCP Council area who wish to apply for a school will need to complete their home local authority's application form in accordance with timescales published in that local authority's scheme.

BCP Council will send a list of all applicants to all school admission authorities within the council's area. It will send applications for schools in other local authorities to the relevant local authority to administer.

Information from other admission authorities

Where a parent or carer lists a school which is its own admission authority, or a school in another local authority as one of their preferences, information is electronically transferred to the relevant school or local authority. The admission authority will then be required to rank in order the applications they received in accordance with their admission arrangements and decide whether they can offer the child a place.

Once the decisions have been made by the relevant admission authority, they are returned to the local authority (LA) by the deadline specified (see timetable below). The LA then compares the ranked lists; if a child's name appears on more than one ranked list, the LA will then refer to the preference order on the application to see which school the family wants the most. Then, in accordance with the order of preference on the application form, the child's name will be retained on the list of the highest preference school able to offer a place and removed from the lower preference schools lists.

Places freed up by this process will then be offered to applicants who are next on a school's ranked order of priority.

When preferences cannot be met

For those applicants who are not able to be offered any of their preferred schools and do not have the opportunity to remain at their current school:

- if they are resident in BCP Council, they will be offered a place at the nearest school to their home address which still has places available with agreement from the relevant admissions authority; or
- if they are resident outside of the BCP Council area, we will advise their home local authority that we are unable to offer a place. The resident's local authority are responsible for offering a place, where appropriate.

Those applicants who apply after the national closing date go through a similar process again, resulting in further offers being made in accordance with the agreed late application timetable.

Outcome of applications

BCP Council will advise parents and carers who applied online by uploading the outcome to the online system. Parents and carers will be able to view the outcome of their application online on the relevant national offer date. BCP Council will issue letters to all parents on the national offer dates.

Waiting lists

The length of time a child's name is on the waiting list cannot be considered when places become available. Places are offered in accordance with the oversubscription criteria in the school's published admissions policy.

Waiting lists for the point of entry must be held until 31 December 2027. Not all schools hold waiting lists after this time. Parents will receive information in their notification letter about how the waiting lists are managed.

All waiting lists held for the full academic year 2027-28 will expire on 31 August 2028. Parents and carers must submit a new school application form for 2028-29 and any subsequent years. Applications can be submitted from 1 June 2028.

Timetable for on-time applications

	Secondary	Junior/Middle	Infant
Opening date for applications	01/09/26	01/11/26	01/11/26
Closing date for applications	31/10/26	15/01/27	15/01/27
BCP Council to exchange applicant information received with other local authorities and school admission authorities in the BCP Council area by	18/11/26	03/02/27	03/02/27
Admission authorities to send electronically a list of pupils to BCP Council in the order to be considered, together with the relevant criteria for each applicant by	13/01/27	10/03/27	10/03/27
First exchange of offers between BCP Council and other LAs for applicants resident in their respective areas by	27/01/27	17/03/27	17/03/27
Deadline for final exchange of offers between LAs for applicants resident in their respective areas	10/02/27	31/03/27	31/03/27
BCP Council to inform other admission authorities of final allocation of places by	24/02/27	12/04/27	12/04/27
BCP Council issues notification letters to all applicants and on-time notifications to be uploaded on	01/03/27	16/04/27	16/04/27
Parents respond by	15/03/27	30/04/27	30/04/27

Timetable for late applications

	Secondary	Junior/Middle	Infant
Late applications submitted from	01/11/26	16/01/27	16/01/27
Closing date for late applications	22/01/27	15/04/27	15/04/27
BCP Council to issue notification letters to all late applicants on	25/03/27	14/05/27	14/05/27
Parents respond by	08/04/27	28/05/27	28/05/27

Please note

At the end of the above timetable, BCP Council will continue to coordinate the allocation on a regular basis until 31 August 2027.

In Year Admissions

BCP Council School Admission coordinates in-year applications for the majority of schools. This means that a single application form is available for parents to express one or more school preferences.

There are some schools that have chosen to manage their in-year admissions themselves. Parents should check bcpcouncil.gov.uk/schooladmissions for further information prior to making an application.

The following information is only relevant for schools who agree to be part of the local authority's in year coordination scheme:

In Year applications for faith schools

Parents and carers applying for a church school who request a place on faith grounds may need to provide a completed supplementary information form. The supplementary information form (SIF) is available from the school or a copy can be downloaded from the BCP Council website. Details of where to return the SIF are set out in the information on each school's websites regarding their admission arrangements.

Outcomes following submission of in year applications

Parents and carers applying for schools through BCP Council's School Admissions Team should expect to receive an outcome in writing within fifteen school days. The exception to this is where a parent applies for a place in a grammar school. In these cases, the school must notify the parent in writing within fifteen school days of the date for the assessment. Information regarding schools that do not process applications in a timely manner may be passed on to the Schools Adjudicator and/or relevant Department for Education agencies (e.g. Regional Schools' Commissioner, Education, Funding and Skills Agency). The need to request direction may also be considered.

Admission appeal outcomes

All Admission Authorities will inform BCP Council of the results of any appeal hearings within two working days of the appeal outcome.

Advance applications for a September start for places in a year group other than the standard point of entry (in-year admissions)

With the exception of applications for Grammar Schools, applications received will not be processed until after 1 June 2028.

Applicants applying any time before 1 June 2028 for the 2028/29 academic year will be informed that their application form will be cancelled and they will need to submit a new application. This does not constitute a refusal to offer a school place at any of the preferred schools and therefore there will be no right of appeal until such time as the application has been processed.

Grammar School applications will need to be processed early to allow sufficient time for testing and, if appropriate, to allow appeals to be heard before the end of the summer term. Parents will need to contact grammar schools to find out testing dates and the earliest date they can apply from.

BCP Council School Admissions and Transport Team

school.admissions@bcpcouncil.gov.uk

Equality Impact Assessment: Conversation Screening Tool

What is being reviewed?	School Admission Arrangements 2027/28
What changes are being made?	<ul style="list-style-type: none"> The School Admissions Code 2021 requires admission authorities for publicly funded non-special schools to consult and determine admission arrangements in readiness for future school applications. We are the admission authority for four maintained schools: <ul style="list-style-type: none"> Burton CE Primary School Mudeford Community Infants School Mudeford Junior School Somerford Primary School We have a single admissions policy for the above four schools. The policy only applies to these schools. All other publicly funded non-special schools in BCP Council are responsible for consulting and determining their own admissions policies. Any changes to the council's admission arrangements must be publicly consulted on to meet statutory requirements. We are consulting on: <ul style="list-style-type: none"> Reducing the Published Admission Number (the number of children admitted at the start of the 2027/28 academic year into Reception) from 45 to 30 Clarifying the definition of children of staff following advice from our dioceses. The consultation runs from Monday 10 November 2025 until Monday 22 December 2025. This meets the statutory requirement to consult for a minimum of six weeks. Once completed, we will be requesting consideration and determination of the Cabinet through our democratic processes. Further information about School Admissions for all publicly funded non-special schools in BCP Council can be found at bcpcouncil.gov.uk/schooladmissions
Service Unit:	Children's Services
Participants in the conversation:	<p>Angie Hill, Manager, School Admissions and Home to School Transport, Children's Services</p> <p>Tanya Smith, Head of Service – School Places and Capital, Children's Services</p> <p>Caroline Stanley, Team Leader, School Admissions and Home to School Transport, Children's Services</p>
Conversation date/s:	Weekly since September 2025 (as we also support other schools that need to consult on their policies).
Do you know your current or potential client base? Who are the key stakeholders?	<p>The BCP Council Community and VC Schools Admissions Policy is for parents and carers of children aged 3-to-11-years-old who want to apply for a primary school in Christchurch.</p> <p>The BCP Council Coordinated Scheme is specifically for the council, schools and other local authorities to refer to in order to ensure that the administrative processes are correctly applied and timescales are followed to meet statutory application closure and notification dates.</p>

	<p>Both the Admissions Policy and the Coordinated Scheme will be made available on the BCP Council school admissions webpages. Current versions are available at Admission arrangements for BCP schools 2026-27 BCP. The 2027/28 arrangements will contain will be publicly available in the same way once determined.</p> <p>During the 2024/25 academic year, BCP Council received approximately 7,500 applications for point of entry to school (Reception, Year 3, Year 5, Year 7 and Year 9) and a further 4,200 (approximately) in year applications to start school during the school year.</p>
<p>Do different groups have different needs or experiences? Age (young/old), disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion or belief, sex, sexual orientation, members of the armed forces community, any other factors/groups e.g. socioeconomic status, carers, human rights</p>	<p>The policy ensures that school admission applications are considered based on the statutory requirements of the School Admissions Code.</p> <p>The School Admissions Code requires Looked After Children, Previously Looked After Children and children with an Education, Health and Care Plan (EHCP) are prioritised.</p> <p>When there are more applications than school places available, the admissions policy includes a set of oversubscription criteria to enable fair and equitable ranking of applications. The oversubscription criteria, after allocation of placement for children and young people with an Education, Health and Care Plan (EHCP) are:</p> <ol style="list-style-type: none"> 1) Looked After and Previously Looked After Children (including children who were previously looked after in state care outside of England). 2) Children who BCP Council accepts have an exceptional medical or social need and where there is a need for a place at one specific school. 3) Children who live in the school's catchment area who have a sibling who is already on the roll of the school and will continue to attend the school at the time of admission. 4) Children living within the school's catchment area who are attending a recognised feeder school and are on that school's roll at the time of application. 5) All other children who live in the school's catchment area. 6) Children who live outside the school's catchment area who have a sibling who is already on the roll of the school and will continue to attend the school at the time of admission. 7) Children living outside the school's catchment area who are attending a recognised feeder school and are on that school's roll at the time of application. 8) Children living outside the school's catchment area and whose parents wish them to attend a CE (Church of England) voluntary controlled school on denominational grounds. 9) Children of staff where the member of staff has been employed for two or more years at the school applied for at the time the application for admission is made, or who have been recruited to a vacancy to meet a demonstrable skills shortage as at the date of application (in year) or relevant closing date under the local authority co-ordinated scheme (normal year of entry) and

who still intend to be employed at the school at the time of the child's admission.

10) All other children who live outside the school's catchment area.

If a school is oversubscribed in any of the categories above, children in the oversubscribed category who live closest to the school will be given priority.

In the event that the last place offered is given to a child from a multiple birth, all children from the multiple birth will be offered a place over the published admission number for the school.

In the event that the criteria and distance measurement s equal for two or more applicants, the place will be allocated by the drawing of lots.

The School Admissions Code support equality duties by placing the following restrictions on admission arrangements:

"1.9 It is for admission authorities to formulate their admission arrangements, but they must not:

a) place any conditions on the consideration of any application other than those in the oversubscription criteria published in their admission arrangements;

b) take into account any previous schools attended, unless it is a named feeder school;

c) give extra priority to children whose parents rank preferred schools in a particular order, including 'first preference first' arrangements;

d) introduce any new selection by ability;

e) give priority to children on the basis of any practical or financial support parents may give to the school or any associated organisation, including any religious authority. The exception to this is where parents pay optional nursery fees to the school or school-run nursery, for additional hours on top of their 15-hour funded early education, where children from the school nursery class or school-run nursery are given priority for admission to Reception;

f) give priority to children according to the occupational, marital, financial, or educational status of parents applying. The exceptions to this are children of staff at the school and those eligible for the early years pupil premium, the pupil premium and the service premium who may be prioritised in the arrangements in accordance with paragraphs 1.39 – 1.42;

g) take account of reports from previous schools about children's past behaviour, attendance, attitude, or achievement, or that of any other children in the family;

h) discriminate against or disadvantage disabled children, those with special educational needs, or those applying for admission outside their normal age group where an admission authority has agreed to this under paragraphs 2.18 to 2.20;

i) prioritise children on the basis of their own or their parents' past or current hobbies or activities (schools which have been designated 291 having a religious character may take account

of religious activities, as laid out by the body or person representing the religion or religious denomination;

j) in designated grammar schools that rank all children according to a pre-determined pass mark and then allocate places to those who score highest, give priority to siblings of current or former pupils;

k) in the case of schools with boarding places, rank children on the basis of a child's suitability for boarding – more information on boarding schools is set out at paragraphs 1.43 - 1.44;

l) name fee-paying independent schools as feeder schools;

m) interview children or parents. In the case of sixth form applications, a meeting may be held to discuss options and academic entry requirements for particular courses, but this meeting cannot form part of the decision making process on whether to offer a place. Boarding schools may interview children to assess their suitability for boarding;

n) request financial contributions (either in the form of voluntary contributions, donations, or deposits (even if refundable)) as any part of the admissions process – including for tests; or

o) request photographs of a child for any part of the admissions process, other than as proof of identity when sitting a selection test.”

The School Admissions Code also prohibits collection of the following on the application form:

“2.2 The Common Application Form (CAF) must allow parents to provide their name, their address (including documentary evidence in support), and the name, address, and date of birth of the child. The child must not be required to complete any part of the CAF.

2.4 In some cases, admission authorities will need to ask for supplementary information forms in order to process applications. If they do so, they must only use supplementary forms that request additional information when it has a direct bearing on decisions about oversubscription criteria or for the purpose of selection by aptitude or ability. Places must be allocated on the basis of the oversubscription criteria only. An applicant must not be given additional priority solely on the basis of having completed a supplementary form. Admission authorities must not ask, or use supplementary forms that ask, for any of the information prohibited by paragraph 1.9 above or for:

a) any personal details about parents and families, such as maiden names, criminal convictions, marital, or financial status (including marriage certificates);

b) the first language of parents or the child;

c) details about parents' or a child's disabilities, special educational needs, or medical conditions;

d) parents to agree to support the ethos of the school in a practical way;

	<p>e) both parents to sign the form, or for the child to complete the form.”</p> <p>The requirements of the School Admissions Code, our admissions policy and our application form therefore support different groups, including groups with protected characteristics applying for a school place and ensure that the allocation of school places is fair, clear and objective.</p>
Will this change affect any service users?	<p>As the proposed changes to the admission arrangements do not impact on the anticipated number of children who will be in the area and require a school place at Burton Primary there will be no change in how service users are affected.</p>
What are the benefits or positive impacts of the change on current or potential users?	<p>The proposed reduction in the Published Admission Number (PAN) at Burton Primary is intended to strengthen the school’s financial sustainability and support effective planning, resourcing, and delivery of the curriculum. This change will help provide children and their families with a stable and well-supported educational experience.</p> <p>As there are no other changes to the admission arrangements and the processes involved in allocating school places the impact of the policy will remain the same as previous years.</p> <p>The arrangements remain in line with the statutory requirements of the School Admissions Code and ensure that the practices and the criteria used to decide the allocation of places is fair, clear and objective.</p> <p>The requirement to ensure that children with EHCPs are placed before allocation of all children and the requirement to ensure all Looked After and Previously Looked After Children are ranked highest using the oversubscription criteria ensures that these vulnerable groups are positively impacted by the admissions process.</p> <p>Families are asked prior to completing their application to confirm they have read the Parent’s Guide to Admissions. They can also seek advice and guidance from the School Admissions Team and reminders about applying for a school place are promoted through BCP Council media channels, early years providers and schools.</p> <p>Families are strongly advised to complete all four preferences on their application form and include their nearest or catchment school as one of their preferences to ensure they have the maximum opportunity to be offered a place at their local school should one of their higher preferences be unable to do so.</p>
What are the negative impacts of the change on current or potential users?	<p>As the reduction in PAN is underpinned by pupil place planning data illustrating the reduced need for places in the Christchurch area it is anticipated that there will be no change in how service users how service users are affected.</p> <p>This is further evidenced by the fact that Burton (which has an Admission Number of 45 in all its year groups) has vacancies in all year groups except Year 6.</p>

Will the change affect employees?	Not applicable as the arrangements only apply to those seeking a school place.
Will the change affect the wider community?	The proposed reduction in PAN will not impact the wider community – almost all pupil place planning areas in BCP Council are experiencing reduced demand for school places due to falling birth rates.
What mitigating actions are planned or already in place for those negatively affected by this change?	<p>The consultation has been made available on both the Have Your Say website and on the BCP Council school admissions webpages available at bcpcouncil.gov.uk/schooladmissions.</p> <p>In addition, we have publicised the consultation on social media and through BCP Council newsletters.</p> <p>We are also statutorily required to inform all schools in our area (including those within a mile of BCP Council's boundaries), neighbouring local authorities and our local dioceses. This has been completed through emails, our Early Years and Childcare Newsletter and our Education Bulletin. Early Years providers and schools have been encouraged to share the consultation with their families, staff and other interested parties.</p> <p>Forecasts indicate that from September 2027, no more than 30 places will be required at the school. This reflects a broader trend of fewer families seeking school places in the area due to falling birth rates.</p> <p>The Governors and staff at Burton Primary School support the proposed reduction. Operating with a PAN of 30 will help ensure the school remains financially sustainable and enable the school to plan, resource and deliver our curriculum effectively. It is more cost-efficient to run a full class than two small classes. If needed, the PAN can be increased again in the future if local demand for school places rises again.</p> <p>Parents Guides are published annually to support parents and are available at Parents guide to school admissions BCP.</p> <p>As the processes involved in allocating school places remain the same, there will be no change in how service users are affected.</p> <p>In circumstances where families are not offered one of their preferred schools, we are required to allocate a school place. Families who are unhappy with their offered school can submit additional preferences and consider using their right to request an independent admission appeal.</p> <p>Advice and guidance for families wishing to apply for a school place is available at bpcouncil.gov.uk/schooladmissions. Families can also email their queries to school.admissions@bcpcouncil.gov.uk or talk to us by calling 01202 123222.</p>
Summary of Equality Implications:	<p>All school applications will continue to be processed in line with the requirements of the School Admissions Code and the relevant school admissions policy(s). Families are provided with advice and guidance on how to apply, deadlines for applying and information about their right of appeal should they not be offered their preferred school.</p> <p>Families will have the opportunity to access an independent</p>

	<p>appeal process if they are unhappy with the outcome of their application.</p> <p>The requirement to ensure that children with EHCPs are placed before allocation of all children and the requirement to ensure all Looked After and Previously Looked After Children are ranked highest using the oversubscription criteria ensures that these vulnerable groups are positively impacted by the admissions process.</p> <p>School admission arrangements are within the domain of Education described in the Measurement Framework for Equality and Human Rights. They ensure access to appropriate education is provided for children and young people.</p>
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CABINET



Report subject	Early Years and Mainstream Schools Funding 2026/27
Meeting date	4 February 2026
Status	Public Report
Executive summary	<p>This paper outlines the proposed 2026/27 local mainstream schools funding formula based on recommendations from the Schools Forum.</p> <p>The formula is highly regulated by the Department for Education (DfE), with funding provided by the £293m schools block of the ring-fenced dedicated schools grant (DSG).</p> <p>The proposed local mainstream formula is to replicate the national funding formula (NFF) with minor amendments as recommended by Schools Forum on 19 January 2026 to reflect that it is not affordable in full.</p> <p>The early years single funding formula (EYSFF) is being considered by Schools Forum on 16 February 2026 to allow time for a full consultation process with providers.</p>
Recommendations	<p>It is RECOMMENDED that Cabinet recommends to Council:</p> <p>(a) The decision for the early years single funding formula (EYSFF) is delegated to the corporate director for children's services in consultation with the portfolio holder for children, young people, education and skills.</p> <p>(b) The mainstream schools funding formula detailed in Appendix 2.</p>
Reason for recommendations	The recommendations reflect the mainstream schools formula recommended by the Schools Forum in January 2026 and the timetable for the early years consultation requested by providers.
Portfolio Holder(s):	Councillor Richard Burton, Children, Young People, Educations and Skills
Corporate Directors	Cathi Hadley, Director of Children's Services
Report Authors	Nicola Webb, Assistant Chief Finance Officer Tanya Smith, Head of School Place Planning, Admissions and Capital
Wards	Council-wide
Classification	For Decision

Background

1. The DSG is allocated by the DfE through four separate funding blocks – early years, schools, high needs, and central school services with a total estimated for 2026/27 of £426m provided in the settlement announced on 17 December 2025.
2. A summary of the DSG settlement for 2026/27 is provided in table 1 below:

Table 1: School Funding Settlement 2026/27

DSG Funding Block	2025/26 Forecast	2026/27 Forecast	Annual Change		Reason for Change
	£000's	£000's	£000's	%	
Early Years	52,499	62,205	9,706	18.5%	Full year impact of free entitlements for working parents from Sept. 2025 and increased funding rates.
Schools *	291,773	292,823	1,050	0.4%	Increased NFF funding rates but falling rolls in both primary and secondary schools and with reduced growth funding
Central School Services Block (CSSB)**	2,174	2,187	13	0.6%	Increase in unit funding rate applied to falling pupil numbers.
High Needs *	68,369	68,369	0	0.0%	High Needs NFF suspended with no increase in funding.
Total	414,815	425,584	10,769	3%	

* Comparative includes 2025/26 separate pay grants rolled into the DSG NFF baselines for 2026/27. ** Central services 2026/27 forecast assumes successful application to restore commitment funding to the prior year level (outcome expected in March 2026).

3. The main driver of DSG funding levels is pupil numbers. The birth rate decline is continuing its progress through schools with a 1.4% reduction in pupil numbers overall at the October 2025 school census. The impact has progressed into secondary school age pupils in BCP for the first time in the current academic year (2025/26).
4. The schools block allocations are now fixed but it is likely that additional grants will be paid to schools to reflect national pay awards when they are known as in previous years. Significant adjustments could be made to early years funding in-year based on the take up of the free entitlements at each termly census. A small element of high needs block funding will be adjusted in-year based on the January 2026 pupil-level data returns.
5. Each funding block has its own national funding formula (NFF) methodology to allocate funding to the local authority and expenditure is governed by the School and Early Years Finance and Childcare (Provision of Information About Young Children) (Amendment) (England) Regulations 2025.

Schools Forum

6. The Schools Forum is a statutory consultation body of the council with its constitution and operation regulated by the DfE. It has oversight of all DSG budgets with a range of decision-making powers.
7. The Schools Forum includes representation from the early years sector, each phase of school (primary, secondary, special, and alternative provision), each status (maintained and academy) plus an age 14-19 provider and local dioceses. Lead officers and the Cabinet members for children's services and resources can contribute at meetings but are non-voting members of the forum.

8. The regulations set out the responsibilities for decision-making between the Council and the Schools Forum, including any consultation requirements.
9. The Schools Forum decides the level of central expenditure retained from each funding block, except for high needs, for which it has a consultation role only. It also decides if funding can be transferred away from the schools block up to a maximum of 0.5%, with any higher level requiring the approval of the DfE.
10. Funding through the central school services block is used to support a range of council services supporting schools (for example, the school admission service) with the decision regarding the use of funding made by the Schools Forum.
11. Schools Forum is to make recommendations, following consultations with each sector, regarding the early years and mainstream schools funding formulae with the decisions to be made by Council.

Early Years Funding Block and EYSFF 2026/27

12. Funding is for a sector comprised of private, voluntary, and independent settings with a small number of nursery classes in mainstream schools.
13. The DSG funding rates have increased for each entitlement for 2026/27, and the number of funded hours will increase compared with current levels as the entitlement expansions for working parents from September 2025 will apply for a full financial year.
14. The funding rates include allowances for pay awards and other pressures across the sector. The hourly funding rate increases are as follows for children:
 - a. aged under 2 (working parents) - 6.3%
 - b. aged 2 - 6.5% - both entitlements (working parents, children requiring extra support)
 - c. aged 3&4 - 9% with a further 3% added to reflect that the move to termly census funding is more costly for local authorities.
15. The pass-through rate of funding to providers must be at least 97% of funding for each of the four different entitlements separately. Included in the passthrough calculation is the local EYSFF funding and special education needs inclusion fund (SENIF) allocations to providers as well a contingency for provider allocations being more than expected as funding rates cannot be changed in-year.
16. Early years take up of the entitlements in 2026/27 has been estimated by the DfE based on their latest data and the funding total will remain estimated until summer 2027.
17. The council is responsible for distributing funding between childcare providers through the EYSFF. The methodology is determined locally within DfE parameters, with a requirement to consult providers on any changes.
18. Last year a principle-based consultation was undertaken with the sector during October – November 2024 and the outcome shared with Schools Forum in time for a recommendation to be provided to Council in February. However, this approach was not popular with providers, and they have been clear this year that any consultation undertaken with the sector should be based on known funding values and not estimates. Also, that consultation should not be undertaken over a period that includes the Christmas school holidays.
19. The late announcements this year on 15 December has meant that consultation has been undertaken in January 2026 and been unable to conclude in time for the 19 January Schools Forum meeting. A Schools Forum meeting has been arranged for 16 February to consider the outcome of the provider consultation and make a recommendation to the council.

20. A summary of the EYSFF being recommended to providers is included in Appendix 1. The formula must be approved and notified to providers by 28 February 2026. To meet this deadline and give providers as much notice as possible, it is recommended that the decision for the 2026/27 formula is delegated to the corporate director for children's services, in consultation with the portfolio holder for children, young people, education and skills. This will enable time for full stakeholder engagement and Schools Forum to consider the outcome of the consultation and make a recommendation.

Schools Funding Block

21. Funding through the schools block is for mainstream schools and finalised each year in the December settlement through two separate funding streams – the mainstream school NFF and the growth fund NFF.
22. The school level NFF allocations calculated by the DfE for 2026/27 use school census data from October 2024. These allocations are totalled and divided by pupil numbers to derive the primary and secondary school phase unit funding levels for each council. These separate school phase unit values are then applied to the October 2025 census pupil numbers to determine the final schools NFF funding to the council.
23. The local formula must use school data from the October 2025 school census to calculate school budgets so these will differ from those provided through the NFF to the council.
24. The mainstream schools NFF in 2026/27 has increased unit values for all formula factors by an average of 2.1% with the minimum per pupil funding remaining at 2025/26 levels. This means that schools where the formula provides funding below the minimum in both years will not see an increase in per pupil funding in 2026/27.
25. The growth fund NFF has provided only £0.9m within the schools block and this is less than half of the allocation in 2025/26. This accounts for much of the low overall growth in the schools block alongside the reduction in pupil numbers.

Central School Services Block (CSSB)

26. The CSSB is fully committed to the council's central education budgets supporting schools with allocations agreed by the Schools Forum on 19 February 2026 at the level of funding.

High Needs Funding Block

27. The high needs block largely funds the costs of meeting the needs of individual pupils through top up funding for those in mainstream schools and funding for pupils in special schools and other specialist providers.
28. The high needs NFF has been suspended for 2026/27 with no increase in funding though the Settlement. Small adjustments will be made in-year to update for pay grants to be passed on to schools and to take account of the cross-border flow of pupils based on January 2026 data returns.
29. Any transfer of funding from the school block to support high needs is for one year only so that the amount is not locked into the budget. It is limited within the regulations to 0.5% of school block funding.
30. The Schools Forum has been clear annually that all schools expect to receive their NFF allocations in full if affordable, and only surplus funds are available for transfer. The DfE has also made clear that any further applications to the DfE that are outside the wishes of schools would be unsuccessful.

Mainstream School Funding Formula 2026/27

31. The 2026/27 mainstream school NFF detail is set out in Appendix 2. It is not affordable in full when applied to the October 2025 BCP school data with a shortfall of £0.15m. No proposals have, therefore, been developed to transfer funding away from the schools block to support pupils with high needs.
32. The funding shortfall is due to the significant reduction in growth funding (which has subsidised the mainstream schools NFF in recent years) and the continuing trend for increasing numbers of pupils attracting characteristics funding in school data (for example, being from relatively deprived households).
33. The local formula to pass funding on to mainstream schools must be designed to a DfE template, the authority pro-forma tool (APT), which is based on the NFF and provides detailed calculations and narrative. The APT must be approved by the DfE prior to budgets being notified to schools. The DfE ensure the budget calculations adhere to the regulations, and any variations (dis-applications of the regulations) have the appropriate approvals from the Schools Forum and/or the DfE. No disapplication requests were made this year and no DfE decisions are pending other than approval of the APT calculations.
34. As last year, the previously expected July government announcements for the mainstream schools NFF were not made until late November 2025 with the DfE not providing the APT to enable modelling of options to commence until 17 December.
35. To be made affordable the NFF could be adjusted by:
 - a. Reducing any individual or all unit values within the 2.5% tolerance permitted.
 - b. Reducing the minimum funding guarantee (MFG) from the NFF 0% up to the permitted maximum reduction of minus 0.5% in per pupil funding
 - c. Introducing a cap on per pupil funding increases (either by scaling back all increases by an equal percentage or only those above a threshold)
 - d. Any combination of methods (a) to (c) above
36. Options were presented to the Schools Forum on 19 January 2026 with a recommendation made to the council as set out in Appendix 2.

Options Appraisals

37. The January 2026 early years consultation with providers set out proposals for the 2026/27 EYSFF as set out in Appendix 1.
38. The mainstream schools funding formula options were considered in the consultation process with schools and Schools Forum and are summarised in Appendix 2 with further detail available in the papers for the January 2026 Schools Forum meeting (link within the background papers).

Summary of financial implications

39. The EYSFF and mainstream schools formula are set within the funding envelope of the DSG and therefore have no impact on the general fund.
40. The impact of the growing accumulated DSG deficit is considered further in the Budget and Medium-Term Financial Plan (MTFP) 2026/27 report scheduled for later in February.

Summary of legal implications

41. The consultation undertaken and formulae recommendations are compliant with the School and Early Years Finance and Childcare (Provision of Information About Young Children) (Amendment) (England) Regulations 2025.

42. Funding rates for early years must be provided to the sector by 28 February 2026 (in prior years was 31 March).
43. School budgets must be finalised and notified to maintained schools by 28 February 2026 with the DfE timetable the same for academy budgets.

Summary of human resources implications

44. Implications for staffing levels from mainstream funding changes rests within individual schools.

Summary of sustainability impact

45. None.

Summary of public health implications

46. Should appropriate funding not be allocated to meet the needs of pupils with SEND within BCP, there may be health and well-being implications for this group of the population leading to reduced health equalities locally.

Summary of equality implications

47. An equalities impact assessment has not been undertaken. The DfE has undertaken equality impact assessments in determining the structure of the funding formulae and how funding is to be allocated. The local formula is aligned with the national scheme.

Summary of risk assessment

48. There are no risks to the council from the implementation of the funding formulae within the Regulations and published guidance. However, the main risk relates to the high needs funding gap over the next two years until the government take over the SEND budget from councils in April 2028.

Background papers

1. DfE DSG Settlement announcements 17 December:
[dedicated schools grant \(DSG\) funding allocations for the 2026 to 2027 financial year](#)
2. Schools Forum Meeting – 19 January 2026
[Welcome to BCP Council | BCP](#)

Appendices

- | | |
|------------|--|
| Appendix 1 | Summary of the EYSFF and proposed funding values for 2026/27 included in the stakeholder consultation. |
| Appendix 2 | Proposed mainstream schools formula 2026/27 |

EYSFF**Background**

1. The DSG early years block funding includes hourly rates for children:
 - a. aged 3&4 (30 hours for working parents and 15 hours for others),
 - b. aged 2 (30 hours for working parents or 15 hours for those from disadvantaged backgrounds)
 - c. aged between 9 months and 2 years of working parents only
2. The early years block is distributed according to a national funding formula (NFF) with funding allocated by the local authority to providers in accordance with the School and Early Years Finance and Childcare (Provision of Information About Young Children) (Amendment) (England) Regulations. The regulations impose some restrictions on how the funding can be allocated to early years providers, as well as detailing the central expenditure that can be charged to the grant within the block.
3. Elements included within the DSG, but outside the early years funding formula are as follows:
 - a. Early years pupil premium (EYPP) for eligible children
 - b. Disability Access Fund for one off payments to settings for eligible children

EYSFF Parameters

4. The Council is required to operate an EYSFF for all providers. The formula is applicable for the free entitlements to childcare places delivered in pre-schools, day nurseries, independent schools, childminders, and in nursery classes within a small number of academies.
5. The formula for 3 and 4-year-olds is to include a universal base rate for all providers and a mandatory deprivation supplement to differentiate funding.
6. The formula for 2-year-olds includes a base rate for all providers and a discretionary deprivation supplement to differentiate funding between a disadvantaged 2-year-old, a working parent and a working parent eligible for EYPP.
7. The formula for under 2's includes a base rate for all providers and a discretionary deprivation supplement to differentiate funding between a working parent and a working parent eligible for EYPP.
8. The formula must include a SEND Inclusion Fund (SENIF). The SENIF provides additional funding to support children with additional needs in all free entitlement age groups. SENIF is not provided under the statutory framework for EHCPs. Any EHCPs for children in the early years age groups are funded by the high needs block following statutory processes in addition to the inclusion fund within the EYSFF.
9. Councils are permitted to retain up to 3% of the early years funding from each entitlement separately for central services such as administering the entitlement and providing support to providers and systems to operate the funding claims. Included within the retention can be any amounts transferred to other free entitlement age groups or other funding blocks.
10. A central contingency is held as DfE funding is adjusted in-year based on take up at termly census points and this may provide fewer hours than the take up to be funded for providers across each term. This contingency is included in the calculation of the 97% passthrough rate to providers, except for 3 and 4 year olds. This age group has separate arrangements due to the move to termly census in 2026/27. Previously funding was based only on two January census points. This is explained further under Table 3d in the next section.

EYSFF 2026/27

11. It is proposed that only the base rate is increased in 2026/27 for each age group with the table below showing the comparison with 2025/26:

Table 2: EYSFF – Hourly Funding Rates 2026/27

	Provider base rate 2025/26	Proposed increase to provider base rate	Proposed provider base rate 2026/27	% increase
Under 2s	£10.28	£0.72	£11.25	9.4%
2-year-olds	£7.72	£0.55	£8.27	7.1%
3- & 4-year-olds	£5.34	£0.52	£5.86	9.7%

12. The BCP EYSFF includes only a base rate and deprivation supplement. The budget makes an allowance for a central contingency and additional SEND allocations. Funding is also allocated to central expenditure. Table 4 below shows how the hourly funding rate to the council is allocated to the allowable early years expenditure.

Table 3 – EYSFF funding values and allocation of hourly funding

	Under 2s			
Table 3a	Allocation from funded rate	%	EYSFF Provider Rate for Approval	Notes
Provider Base Rate	£11.25	93.3%	£11.25	Every child
Deprivation Supplement	£0.01	0.1%	£0.33	Per eligible child
SENIF - targeted	£0.15	1.2%	£2.43/£4.86/£7.49	Per eligible child
Central Functions	£0.36	3.0%		
Contingency	£0.28	2.3%		
DSG Funding per hour	£12.06			

	2-year-olds Working Families			
Table 3b	Allocation from funded rate	%	EYSFF Provider Rate for Approval	Notes
Provider Base Rate	£8.27	92.8%	£8.27	Every child
Deprivation Supplement	£0.03	0.3%	£0.65	Per eligible child
SENIF - targeted	£0.14	1.6%	£2.43/£4.86/£7.49	Per eligible child
Central Functions	£0.27	3.0%		
Contingency	£0.20	2.2%		
DSG Funding per hour	£8.91			

	2-year-olds Families receiving additional support (disadvantaged families)			
Table 3c	Allocation from funded rate	%	EYSFF Provider Rate for Approval	Notes
Provider Base Rate	£8.27	92.8%	£8.27	Every child
Deprivation Supplement	£0.65	7.3%	£0.65	Per eligible child
SENIF - targeted	£0.32	3.6%	£2.43/£4.86/ £7.49	Per eligible child
Central Functions	£0.27	3.0%		
Contingency	£0.00	0.0%		
DSG Funding per hour	£8.91			

	3 & 4 year-olds			
Table 3d	Allocation from funded rate	%	EYSFF Provider Rate for Approval	Notes
Provider Base Rate	£5.86	92.1%	£5.86	Every child
Deprivation Supplement	£0.06	0.9%	£0.33	Per eligible child
SENIF - targeted	£0.25	3.9%	£2.43/£4.86/ £7.49	Per eligible child
Central Functions	£0.19	3%		
Contingency*	£0.00	0%		
DSG Funding per hour	£6.36			

*Note that for 3&4 year old funding in table 3d there is no contingency provided within the total hourly rate. Additional funding of 3% (£0.18) per hour is provided within the DSG with funding is to be excluded from the pass-through rate and the central retention and is to cover the extra cost of moving to termly census for funding.

Additional Information for supplements and SENIF

Deprivation eligibility is determined as follows:

- **3- and 4-year-olds** the supplement is added for those children that had formerly accessed disadvantaged 2-year-old funding or those that are currently eligible for EYPP. The supplement is added only to the funding rate of the entitled child.
- **2-year-olds** the supplement is added for those children that qualify as a disadvantaged 2-year-old, or those that are currently eligible for EYPP. The supplement is added only to the funding rate of the entitled child.
- **Under 2-year-olds** the supplement is added for those children that are currently eligible for EYPP. The supplement is added only to the funding rate of the entitled child.

SEND inclusion is funded as follows:

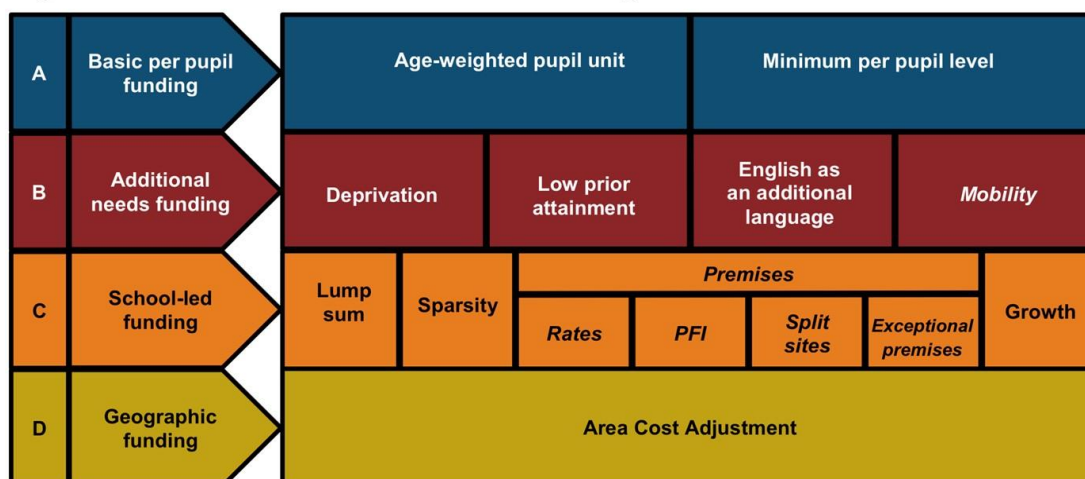
- **(All age groups)** Providers are funded per hour for all early entitlement hours accessed, based on three levels of need which is determined by a weekly panel of special education needs officers.
- Tier 1 at £2.43, Tier 2 at £4.86, tier 3 at £7.49.

Local Mainstream School Funding Formula 2026/27

Background

1. The NFF to provide funding for mainstream schools comprises factors as shown in Figure 1.

Figure 1: Factors in the schools national funding formula



2. The PFI factor and area cost adjustment are not applicable to BCP, with the relevant 2026/27 NFF factors and funding values included in Appendix 2(b).
3. The minimum funding guarantee (MFG) in the NFF is set at 0% for 2026/27 but the local formula can set it between minus 0.5% and 0%. The MFG protects per pupil funding reductions between years, not absolute funding.
4. The minimum per pupil funding level (MPPFL) provides an absolute minimum that cannot be varied without DfE approval.
5. The detail of the local formula has been becoming increasingly regulated each year but with no further changes for 2026/27. Only limited movement away from the NFF funding values is permitted (plus or minus 2.5%) in setting the local formula. The range of unit values set for each formula factor are included in the APT along with the school data to ensure compliance. The APT including the October 2025 school census data was supplied by the DfE on 17 December 2025.
6. As the proportion of schools funded by the NFF (rather than through the fixed MPPFL or MFG) has been increasing, data movements between years have a greater impact on the level of funding provided to schools through the local formula. The DSG schools block allocation will not reflect these data changes until 2027/28 as it uses data lagged by one year to calculate the primary and secondary units of DSG funding.
7. The impact of adopting the NFF as the local formula for 2026/27 if it had been fully affordable for the 90 BCP mainstream schools would have been:
 - a) **Minimum per pupil funding level (MPPFL)** impacts on 24 schools (27%) down from 28 schools last year. Budgets are topped up to the MPPFL where the NFF allocations otherwise would provide less funding than national mandatory minimum levels (typically for schools with more high performing pupils from relatively affluent backgrounds).

- b) **Minimum funding guarantee (MFG) per pupil funding protection of an increase of 0%** impacts on 5 schools (down from 14 schools last year), where the NFF provides less per pupil funding compared with the previous year allocation with funding topped up to this level.
 - c) The remaining 61 schools, up from 45 last year, are fully **formula funded** with changes in NFF allocations driven by the uplift in NFF formula factor unit values and data changes from the October 2025 school census.
8. The NFF is not fully affordable in 2026/27 with a shortfall of £0.15m. In recent years surplus growth funding has been used to top up the NFF funding, enabling all schools to receive their NFF allocations in full. The low growth funding in 2026/27 has led to the overall shortfall in school block funding.

Options

9. To be affordable the NFF could be adjusted by:
- a. Reducing any individual or all unit values within the 2.5% tolerance permitted. This excludes the MPPFLs which are set out in the regulations and can be reduced only with the express agreement of the DfE and where the funding shortfall is so large that it remains the only option remaining to balance.
 - b. Reducing the MFG from 0% up to minus 0.5%
 - c. Introducing a cap on per pupil increases (either by scaling back all increases by an equal percentage or only those above a threshold)
 - d. A combination of the adjustments in paragraphs a to c.
10. Many different options and combinations of approaches could be devised with three viable and illustrative approaches shortlisted for consideration by schools and Schools Forum in January 2026. The options presented were as follows:
- a. Option 1 – to reduce the basic entitlement only by an equal % for each age group (primary, key stage 3 and key stage 4). This would ensure that each phase of school is impacted equally and preserve the NFF funding rates for those pupils attracting pupil characteristic funding, such as for special educational needs. Note that schools protected by the NFF MFG of 0% (along with those funded at the MPPFL) would not contribute any of their funding as the NFF protects the per pupil level at the level of 2025/26.
 - b. Option 2 – to reduce the basic entitlement funding as in option1, and also to reduce the MFG below 0% so that more schools contribute to the shortfall.
 - c. Option 3 – to set a cap on per pupil increases so that only schools with the greater increase in per pupil funding contribute to the shortfall.
 - d. Any of the above options in combination.

Recommendation from the Schools Forum on 19 January 2026

11. Consultation was emailed to all schools on 7 January 2026 with a closing date for responses set at by noon on 16 January to allow time for a summary to be prepared for Schools Forum. A draft of the Schools Forum paper which summarised the mainstream school funding for 2026/27, was used as the basis of the consultation as this detailed the reasons for the NFF funding shortfall, summary of options, and impact across schools.

12. The timescale for consultation was short due to the DfE release of information and the modelling tool, the local authority proforma tool (APT), on 17 December 2025 and the APT being required to be submitted to the DfE by 22 January.
13. The consultation gave schools the opportunity to express a preference for how the NFF should be scaled back to be affordable. It also enabled schools to raise questions directly in seeking clarification on their individual school information, the proposals generally, why there was a funding shortfall, as well as consideration of pupil growth, falling rolls and other potential formula options not included in the modelling.
14. Of the 90 mainstream schools, 64 were included in the feedback, representing 71%. Options 1 and 2 (adjusting formula values and reducing funding protection) were preferred by schools with less support for capping per pupil increases as in option 3.
15. Schools Forum sought clarification on the information provided, considered the options presented and recommended that using the adjustments in options 1 and 2 in combination would produce the fairest outcome. This would keep more schools closer to their NFF funding level and limit the scale of impact for schools with MFG protection. The suggested combination of an MFG of minus 0.25% with the balance from reducing the basic entitlements was modelled and considered with a small group of Schools Forum representatives as requested by the Schools Forum. It was agreed the Schools Forum principled recommendation has been achieved by this option.
16. The changed elements of the NFF for the local formula using the Schools Forum recommendation are shaded green in the table of NFF unit values in Appendix 2(b).

Appendix 2 (b)

Summary of DfE Mainstream School NFF 2026/27

Factor Name	Unit Value 2025/26 £	Subsumed Grants £	Restated 2025/26 £	Unit Value 2026/27 £	% Change
Primary*	3,847	133	3,980	4,064	2.1%
KS3*	5,422	146	5,568	5,686	2.1%
KS4*	6,113	165	6,278	6,410	2.1%
Primary minimum per pupil	4,955	160	5,115	5,115	0.0%
Key Stage 3 minimum per pupil	6,221	167	6,388	6,388	0.0%
Key Stage 4 minimum per pupil	6,831	187	7,018	7,018	0.0%
FSM6 Primary	1,060	124	1,184	1,210	2.2%
FSM6 Secondary	1,555	132	1,687	1,725	2.3%
FMS Primary	495		495	505	2.0%
FMS Secondary	495		495	505	2.0%
IDACI Band A Primary	685		685	700	2.2%
IDACI Band A Secondary	950		950	970	2.1%
IDACI Band B Primary	520		520	530	1.9%
IDACI Band B Secondary	745		745	760	2.0%
IDACI Band C Primary	490		490	500	2.0%
IDACI Band C Secondary	695		695	710	2.2%
IDACI Band D Primary	445		445	455	2.2%
IDACI Band D Secondary	635		635	650	2.4%
IDACI Band E Primary	285		285	290	1.8%
IDACI Band E Secondary	450		450	460	2.2%
IDACI Band F Primary	235		235	240	2.1%
IDACI Band F Secondary	340		340	345	1.5%
Low Prior Attainment Primary	1,175		1,175	1,200	2.1%
Low Prior Attainment Secondary	1,785		1,785	1,825	2.2%
EAL Primary	595		595	610	2.5%
EAL Secondary	1,595		1,595	1,630	2.2%
Mobility Primary	965		965	985	2.1%
Mobility Secondary	1,385		1,385	1,415	2.2%
Lump Sum Primary	145,100	4,486	149,586	152,700	2.1%
Lump Sum Secondary	145,100	4,486	149,586	152,700	2.1%
Sparsity Primary – N/A in BCP	57,400		57,400	58,600	2.1%
Sparsity Secondary – N/A in BCP	83,400		83,400	85,200	2.2%
Split Sites	Variable			Variable	
Business Rates	Variable			Variable	
Minimum Funding Guarantee (MFG)**				0%	

Proposed local formula adjustments to NFF in above table:

*Equal % reduction from the above NFF table values to balance the cost of the local formula to the funding level

**Local formula to use minus 0.25%

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CABINET



Report subject	Hawkwood Road Phase 2 update
Meeting date	4 February 2026
Status	Public Report (Exempt appendices)
Executive summary	<p>This report provides an update on Hawkwood Road, which is a priority project for the Boscombe Towns Fund. In February 2025 Council, resolved to approve the funding strategy for a mixed-use residential-led scheme with a clinical facility in collaboration with the NHS (Option 1).</p> <p>The Cabinet recommendation to Council included an obligation to have a contract in place with the NHS prior to award of the build works contract for the main construction. Despite a Memorandum of Understanding between the NHS and BCP Council being signed in December 2024 and best endeavours, a final contract has not been entered into with the NHS. To maintain delivery, this report seeks authority to proceed to award the build contract for the main construction to ensure that the grant milestones for the Towns Fund programme and Homes England are satisfied and thereby safeguard the total grant of £17.3m.</p> <p>This will allow for continued discussions with the NHS and ensure that the significant social and physical regeneration to the ward of Boscombe West and the local need is not lost.</p> <p>There is a continued commitment to have a health provision at Hawkwood Road, but in the event the NHS cannot proceed, this report seeks authority to market the property as general commercial use as the preferred alternative strategy now due to funding timelines being unachievable for a new residential scheme which would require planning. The 100% residential scheme (Option 2 in the previous Cabinet report) would require a new design and planning application and tender, which is likely to result in higher pricing and therefore is not deliverable within the immediate need to start on site in 2026/2027 and deliver by 2028/2029.</p>
Recommendations	<p>It is RECOMMENDED Cabinet recommends to Council that:</p>

	<ol style="list-style-type: none"> 1. Approval to proceed with Option 1 to enter the build contract for 68 homes and commercial floorspace, prior to executing an Agreement to Lease for the ground floor of Block A, to secure the total combined grant of £17.3m and redevelopment of the Hawkwood Road site within the external funder's timescales. 2. Authority to market the non-residential property as general commercial, if the NHS is unable to commit funding for the ground floor of Block A and noting the full residential scheme is no longer deliverable. 3. Authority to proceed to sale or long leasehold of the ground floor commercial asset to ensure a funding strategy is secured to offset the cost of building.
Reason for recommendations	To enter the build contract in line with the current active tender and grant funding milestones prior to the lease of the ground floor being signed. This will enable the Council to achieve the funding deadlines set by MHCLG and Homes England and ensures the project remains deliverable.

Portfolio Holder(s):	Cllr Kieron Wilson, Portfolio Holder for Housing and Regulatory Services
Corporate Director	Glynn Barton, Chief Operating Officer
Report Authors	Peter Friend, Development Project Manager Remi Oshibanjo, Housing Development Manager Jonathan Thornton, Head of Housing Delivery
Wards	Boscombe West;
Classification	For Recommendation

Background

1. In February 2025, Full Council resolved to approve the Hawkwood Road project, Phase 2 (which had been recommended by Cabinet on 10 December 2024). This included the funding strategy and additional borrowing to support the scheme to proceed to development. This approval was for Option 1 – 68 homes (owned and managed by the Council at Social rent) and an NHS medical/clinical facility with the caveat that the scheme would not move into delivery without a lease signed by the NHS. Option 2 was approved in the same paper as the alternative strategy and proposed 76 socially rented homes. This option is no longer deliverable within the grant funding timeframes and therefore this report proposes that the Council proceed to award the build contract and

market the ground floor use as general commercial in the event the NHS is not able to proceed to a formal rental agreement or acquisition.

2. Since the previous Cabinet authority, good progress has been made to secure the delivery of much needed new affordable homes. Following negotiations with Homes England, £9.7m grant has been secured for the scheme – the largest allocation for any scheme led by BCP Council. Further review of the build costs were carried out to ensure the scheme is as efficient as it can be which resulted in a lower scheme cost to that approved by Cabinet and Council. A Memorandum of Understanding (MoU) was completed with an Agreement for lease to follow by Jan 2026 to enable contracts for the main works to be awarded. At the time of writing this report, negotiations with the NHS are still on-going.
3. In January 2025, the tender for the construction of Hawkwood Road phase 2 (option 1) was published, with a deadline for tender returns of 2 May 2025. Tenders were received with the tender prices being valid for 6 months taking this to 2 November 2025. Due to the ongoing NHS business case approval process, this was extended by agreement of tenderers to 2 March 2026, to satisfy the Cabinet authority which required a formal contract with the NHS prior to award of the main build contract.
4. Subject to Cabinet approval, the intention is to award the build contract to allow for further negotiations with the NHS and maintain delivery to satisfy the grant milestones. This is at risk on the income for the ground floor commercial but is considered necessary to mitigate the greater risk of losing c.£17m and the reputational risk of non-performance with external funders.
5. The Council remains committed to offering a NHS healthcare within the Hawkwood Road masterplan given the indices of deprivation and the need for better health outcomes. The Council continues to explore options with NHS Dorset and partners to develop a neighborhood health centre to complement the community centre and housing offer.
6. The Council has negotiated a grant allocation of £142,500 grant per home (£9.65m total) for 68 homes, which is a higher-than-average grant amount per unit allocation by Homes England and reflects the viability pressures of the scheme. The condition of the grant requires that the build must start on site in April 2026 and complete by March 2029. The Towns Fund grant (c.£7m) requires full spend by 2028. These timelines are under significant pressure due to the time taken to satisfy the previous Cabinet authority that required the NHS to have signed the agreement for lease, which meant the build contract is 4 months behind programme. Further delays would mean the Council is unable to drawdown the grant and that would make the scheme unviable.
7. Additionally, the approval for Option 2 (78 homes and removal of commercial use in Block A) is no longer achievable within the external funders' grant timeframes. Option 2 would require a new business case as the grant would be lost due to the revised scheme needing a new planning application (likely to prolong the programme by over 12 months) and a re-tender of the build contract which is likely to result in higher costs and prices compared to the current tenders being held.
8. Bringing forward option 2 would also require the Council to confer with the MHCLG to seek approval to transfer the Towns Fund grant allocation to the 100% residential scheme. This would be contrary to the wishes of the Towns Fund Board which adds risk to the project who will wish to retain a health offer for the community. Additionally, a new application for grant would need to be made as the current grant for 68 homes is under the old programme and therefore if the Council doesn't proceed to build, we would be required to bid in the new programme which is likely to be highly competitive and therefore puts the funding strategy at risk.

9. Option 2 has therefore been replaced with the alternative option of awarding the build contract with the 68 homes and commercial use, to be marketed in the event the NHS does not commit financially to the scheme. The main benefit of proceeding with this alternative is because it presents the lowest risk, is deliverable within the current funding programmes and satisfies the draw-down requirements of both external funders, Homes England and MHCLG. To de-risk the income for the ground floor commercial use, marketability will be improved by widening the current consented uses. A planning application has been submitted to vary the consented use from medical to include a range of commercial, which provides flexibility to the NHS partners and any other commercial opportunity.
10. Therefore Option 2 as approved by the previous Cabinet report, is no longer recommended as it is not achievable within the timescales and would mean £11m is at risk of being lost.
11. The HRA Business Plan has sufficient capacity for this development in the forms recommended in this paper, the Hawkwood Road financial modelling has been tested as a scheme in the HRA with a payback period over a 50-year period. Appendix 1 shows sensitivity analysis with different interest rates and different rent inflation increases over the life of the buildings.

Options Appraisals

12. Option 1. 68 apartments as originally approved, with NHS use of health provision or commercial use on ground floor of block A

- 12.1. The scheme with planning consent consists of 68 residential apartments spread across three individual blocks, A, B and C, with the medical facility is on the ground floor of block A. These form two separate areas either side of the new park/gardens. The remaining public car park is to the west of block A.
- 12.2. While providing much-needed affordable homes, this option will deliver other public benefits by bringing health provision opportunities into the community.
- 12.3. The 68-home scheme remains unchanged and therefore deliverable within the existing planning consent. To allow for a broader commercial use for the ground floor a new full planning application will be required. As with Option 1 this will deliver many other public health benefits by bringing a new commercial unit to Boscombe, driving commerce in the area as well as overall economic development.

Block A Social Rent	No. Homes	Block B Social Rent	No. Homes	Block C Social Rent	No. Homes	Block A	No.	Total
1b2p flat	8	1b2p flat	6	1b2p flat	8	Medical/ Commer cial/retail facility	1	22
2b3p flat	10	2b3p flat	3	2b3p flat	3			16
3b4p flat	10	3b4p flat	9	3b4p flat	11			30
total	28	total	18	total	22	total	1	

13. Option 2. 100% residential if no agreement was reached with the NHS approval

This would require a new business case as the grant timeframes cannot be achieved and therefore is no longer recommended. A new planning application will

be required for this option to proceed. The preparation of the planning application would take several months and new consultants will need to be procured, additional revenue budget for surveys (which it currently does not have) and will need over 12 months including a new tender which means this falls outside of the grant funding milestones and £7m would need to be handed back to MHCLG. Given timing of when a new scheme would be tendered, the likelihood is this would also increase the cost of development with tender prices likely to reflect higher build costs. This would also require a new bid to Homes England and there is no guarantee that the negotiated grant rates will be secured and could mean a lower grant or worse, no grant award.

14. Milestone comparison (Option 1 and 2)

Milestone	Option 1	Option 2	Deadlines
Start on Site (SOS)	June 2026	July 2027	MHCLG Spend 31/03/2028
Practical Completion (PC)	June 2028	July 2029	Homes England Start works June 2026 and Complete works March 2029

Benefits

15. The main outcome of this development is the regeneration of the area including provision of affordable housing, pocket park and resurfacing of hard landscaping in the area linking through to the previously approved Phase 1 (Community Centre) and Christchurch Road shopping area. This is the case whether Option 1 or 2 are taken forward. Discussions are continuing with the NHS and the Council endeavors to reach a place where in the discussions the NHS are able to sign an agreement for lease and tenancy. Investment by The NHS will help the local residents in an area of deprivation (Boscombe is ranked 978 out of 32,844 in England, where 1 is the most deprived and 32,844 the least, 2015), with current proposals as a Health Centre. Should this avenue not be available to the Council, it is understood engagement with the market to find an appropriate tenant for the commercial unit is the right way forward, whilst safeguarding the vision of the masterplan.
16. A local lettings plan will allow operations to ensure tenancies of the proposed homes complement the vision for the project and the community it serves. Local lettings plan-outline who the project is benefiting.
17. Savings to spend for the Parking team associated with Hawkwood Road Main Car Park can be achieved through delivery of this project.
18. This scheme is part of the Towns Fund project which is a transformational place-making project within Boscombe. Other parts of the Towns Fund Project include investment in skills, public WIFI, Woodland Walk, Shop fronts and many others. These projects will benefit local people and jobs – additional jobs secured through the construction phase of Hawkwood Road (Phase 2) and Community Centre (Phase 1) will be monitored.

Summary of financial implications and Value for Money

19. The following table shows the cost and funding changes that have taken place since February 2025 council approval (more detail shown in confidential appendix 1):

Scheme name: Hawkwood Road Option 1	HOUSING REVENUE ACCOUNT - 68 social rent homes			GENERAL FUND		
	Social rent (February 2026)	Social Rent (cabinet members Apr 2025)	Social Rent (Cabinet Dec. 2024)	Commercial unit & kiosks (February 2026)	Dental College & Kiosks (cabinet members April 2025)	Dental college & Kiosks (Cabinet Dec. 2024)
	£	£	£	£	£	£
Total scheme cost	22,210,320	22,541,500	23,791,000	1,701,297	3,478,500	4,866,000
Funding						
Grants - Homes England	(9,656,000)	(9,656,000)	(9,510,000)			
Grants - Towns Fund	(7,741,000)	(7,741,000)	(5,763,000)	(290,000)	(290,000)	(1,675,000)
Shared Ownership			(2,425,000)			
Total non-debt funding	(17,397,000)	(17,397,000)	(17,698,000)	(290,000)	(290,000)	(1,675,000)
Borrowing requirement	(4,813,320)	(5,144,500)	(6,093,000)	(1,411,297)	(3,188,500)	(3,191,000)
Total Funding	(22,210,320)	(22,541,500)	(23,791,000)	(1,701,297)	(3,478,500)	(4,866,000)

20. The overall Hawkwood Road phase 2 scheme cost has reduced from £28.7 million to £23.9 million.
21. The Housing Revenue Account (HRA) scheme costs have reduced from £23.8 million to £22.2 million following the receipt of tender prices.
22. The General Fund (GF) scheme costs have decreased from £4.8 million to £1.7 million due to a combination of tender prices and change of development configuration from fully fitted to shell and core.
23. The non-debt funding in the HRA has reduced from £17.7 million to £17.4 million due to removal of capital receipts from shared ownership, additional Homes England grant secured and realignment of the Towns Fund grant use including change between the HRA and general fund in this scheme. The changed funding strategy was approved by cabinet members in April 2025.
24. Due to the reduced scheme cost overall, the borrowing requirement in the HRA has reduced from £6.1 million to £4.8 million and in the general fund from £3.2 million to £1.4 million.
25. The post construction cash flow assumptions for the financial appraisal viability have been updated with the following current expectations:

Cash flow assumptions	
Service Charges (Cost) per unit per annum	£828
Service Charges (income) per unit per annum	(£496)
Revenue Maintenance per unit per annum	£886
Major Repairs per unit per annum	£1,630
Management cost per unit per annum	£400
Prevailing interest rate for HRA as of 29/12/2025	5.33%
Prevailing interest rate for GF as of 29/12/2025	5.73%
Rental income adjustments for voids and bad debt (HRA)	1%
Rental income adjustments for voids and bad debt (Kiosks)	6%

26. The cash flow summary in confidential appendix 2 shows the residential part of the scheme in the HRA, generating between £23,443 and £34,514 annual average contribution to the HRA over 30 years depending on interest rates applied and a cumulative contribution between £703,294 and £1.04 million at

year 30 again depending on interest rates applied. It is estimated that the HRA will need to subsidise the scheme with approximately £16,000 to £21,000 on average per annum in the first 10 years, before reaching breakeven point after construction.

27. The cash flow for the commercial space and kiosks in the general fund shows that an average between £21,000 and £175,000 per annum over 30 years could be realised depending on rental income achieved. The model shows that the council could be at risk to initially subsidise borrowing up to a cumulative £107,000 depending on rental income achieved. This would increase if there were longer void periods and rent-free incentives periods.
28. The council has received enquiries about letting all four kiosks and for the commercial space, whilst the NHS has withdrawn support for an oral health institute and is investigating other possible NHS use. The borrowing exposure of the commercial space is £920,320 with an annual repayment of £71,141 over 50 years at the PWLB prevailing interest rate of 5.73% as of 29 December 2025.
29. The borrowing exposure may be mitigated with potential underspend in other areas of the regeneration fund programme which could be redirected towards this scheme.
30. This report seeks approval to proceed at risk before securing rental income to repay the loan required to build the development as per the current tender specifications. A recent report and valuation of the site expressed significant concerns about if the Council to be proposing to proceed, as now is the case, without a pre-letting agreement for use. Whilst it is possible that some businesses may have a defined need for a specific Boscombe location, general market perception is a low need for space in this area. The configuration of the ground floor layout offers a degree of mitigation with effective subdivision.
31. With this information in hand, it is clear the council will struggle to demonstrate the affordability of the prudential borrowing for the commercial space and therefore value for money for this project under the legislative prudential code.
32. However, the council needs to balance the borrowing exposure of £920,000 (excl. land and kiosks) against the potential loss of £9.6 million Homes England grant and the loss or redirection of £7.7 million Towns Fund grant resulting in a lost opportunity to deliver 68 social rent homes in the Boscombe area.
33. In addition, there may be unfunded maintenance and security costs if the premises are not let.
34. The council will need to prioritise the estimated £71,141 debt repayment and any incidental maintenance and security costs, increasing the MTFP gap if the premises are not let.

Risks

35. The largest risk entering the Build contract for Option 1 without the Ground Floor of Block A let, is the risk of income to support the loan required to build the property. Alternative uses have been estimated (as per valuation at Appendix 3 and advice from Estates Team) at c£74,656/pa for shell and core as per recent enquiry.
36. Concerns about primary market letting opportunities in the Boscombe area and ability to let or achieve market value.
37. The configuration of the ground floor layout militates against effective subdivision increasing the risk of additional costs as landlords to remodel the layout before it can be let. Unknown market expectations regarding shell and core specification may increase landlord costs further.
38. Extension of the build contract tender for Option 1 will require all tenderers to agree to a delayed end date, if any tenderer declines, the tender must be collapsed, which will necessitate a new build tender to be issued – this will cause further delay to the project and be an additional risk to external grant funding. Moving forward with Option 2 provides additional risk of losing Homes England (£9.656m) and the loss of grant or need to redirect the use of grant from MHCLG (£7.4m) due to project delay and inability to achieve required milestones.
39. Progression of Option 2 requires collapsing the current build tender, which causes project delay and greater risk to external grant funding to ensure scheme viability.
40. The major repairs assumption has been updated to £1,630 per annum per unit considering the total build cost includes a high proportion of infrastructure (car park resurfacing, highway works, pocket park etc.).

Unchanged Risks Relating to The Housing provision

41. Uncertainty over the inflationary increase for future rental income. The Government has committed to CPI +1% only for the next five years. 2% baseline inflation has been assumed in the models.
42. High interest rates make feasibility of the scheme more challenging. Affordability of the schemes relies on an estimated future lower interest rate of 4.5%, prevailing interest rates of 5.33% in the HRA and 5.73% in the general fund, making viability of the project more vulnerable.
43. Whilst the preferred contractor has come in comfortably under budget, viability of the model is reliant on the construction costs being held at the current bid level. Any increase from this amount introduces risk into the project overall financially. However, the requested extension of time increases the risk of construction costs rising over the extended tender period.
44. Cost contingency is assumed at 10% to allow for build cost fluctuations.

Prudential Borrowing

45. The Council can borrow under the Prudential Code if it is affordable and can be repaid over the life of the asset. The proposed scheme is predicated on borrowing circa £4,8 million in the HRA and £1.2 million (excl. land value) in the General Fund (option 1) repaid over 50 years at an annual interest cost using an estimated rate 5.33% in the HRA and 5.73% in the general fund (PWLB prevailing rate 29 December 2025). Previous modelling with estimated lower future forecasted interest rates have not been progressed because lower interest rates expectations have not been realised to date.
46. Appendix Two demonstrates a positive contribution to the HRA over the 50-year period. This is after provision has been made for interest repayments as well as management, maintenance and major repair costs, and an adjustment to the rental income to cover void costs. Any potential capital growth has been ignored for the purposes of this modelling. Financial modelling assumes the use of fixed rates funding for the schemes repaid on a maturity basis.
47. Affordability for the commercial space in the general fund is high risk at the time of writing; the council will need to prioritise the estimated £71,141 per annum for 50 years debt repayment, increasing the MTFP gap if the premises are not let.

Taxation and Public Sector Subsidy

48. In general, the construction of residential dwellings is not subject to VAT. However, VAT may be applicable on professional fees such as those charged by architects, surveyors etc, which have been accounting from in modelling. Any VAT incurred by the Council on social housing construction is fully reclaimable under section 33 of the VAT Act.
49. Further tax advice should be sought if the properties are sold or leased at market rent.
50. The construction of the community centre and the commercial facility does not qualify for any VAT exemptions and therefore VAT will be charged at standard rate. To ensure the VAT incurred is reclaimable and does not affect the Council's partial exemption threshold, the property must be opted to tax before the works commence.
51. Particular care should be taken when negotiating the terms of the lease for the medical facility, especially regarding fit out costs and any rent-free period. If the NHS undertakes work on the property, that under the general law is considered as the landlord's responsibility, the anti-avoidance measures will be triggered. As a result, the option to tax will be disapplied which will lead to a breach of the partial exemption de-minimis limit and financial implications for the Authority.
52. Subsidy Control is applicable as State resources are given to the Council, in terms of grant from MHCLG and Homes England.

Summary of legal implications

- 53. The Council is empowered by Section 1 Local Government Act 2003 to borrow funds for any purpose related to its functions and/or for the purposes of the prudent management of its financial affairs. The project team will need to be confident that the proposal to enter contract now (before the commercial space is let) supports the provision of housing in accordance with the Council's housing duties.
- 54. Legal advice will continue to be sought regarding the agreement for lease including negotiation of legal documents required for the medical facility or alternative commercial space.
- 55. The Council will need to comply with all relevant procurement requirements in undertaking the proposals contained within this report and the Council will seek further procurement and legal advice in procuring the works contract and completing the appropriate documentation for the construction elements.
- 56. The Council will need to comply with all grant funding conditions that apply to this project.

Summary of human resources implications

- 57. The existing Housing Delivery Team will oversee the delivery of this scheme alongside the other new build schemes in the pipeline. The construction works for the development will be procured through an open tender. No Implications.
- 58. Other professional services have also been procured e.g. architects to bring this scheme forward.

Summary of sustainability impact

- 59. The development will provide energy efficient homes to help address the BCP Council declared Climate and Ecological Emergency 2019. The development will contribute to the Council's commitment to achieving a net zero carbon emission target.
- 60. A carbon reduction statement will be completed to measure the sustainability of the development through carbon savings.
- 61. All homes will be built to high sustainability standards delivered through the excellent fabric first and airtightness approach (designed in this case to accommodate the principles of Passivhaus). This standard offers the benefit of low carbon heating requirements, high levels of energy efficiency and an off-gas heating system.

Summary of public health implications

62. Both options of the site deliver significant public health benefits to Boscombe West, a ward that suffers from various challenges. The provision of affordable housing delivers stability to an area that is currently struggling with transience and little feelings of rootedness. Further, the clinical facility will deliver much needed skill provision and health services to the wider area.

Summary of equality implications

63. Equality Impact Assessment remains unchanged as the scheme that this paper asks for the same scheme that was initially approved in the September Cabinet.

Summary of risk assessment

64. Property development activity involves inherent risks, but a cautious approach has been adopted here to minimise these risks as much as possible. Financial contingencies for build have been included at 10%, and significant consultation has been undertaken to date to help ensure a sustainable scheme.

Overall Project Risk Rating		
Key Project Risks	Gross Risk Rating	Mitigating Actions
A Vacant ground floor	Medium	Continuing discussions with the other parts of the NHS in order to partner as well as consulting with medical and commercial surveyors to position the space competitively on the open market if needed. A reasonable void period has also been factored into cash flow and borrowing requirement. Marketing within the build programme VW report
Rising construction costs render the project unaffordable	Medium	There is high risk if the build contract is not awarded Award the build contract subject to approvals (such as tenderers refusing to a later end date,
Alternative tenants for the property not able to be found	Medium	Active marketing of the property. Increase use class via planning permission.
Scheme not gaining satisfactory planning consent for Option 1 Commercial use	Medium	Current planning consent is for Use Class E(e) healthcare rather than general commercial use. A new planning consent is required.
Insufficient funding available, such as failure to secure funding from s106 Contributions, RTB receipts or Homes England grant, including loss of allocated funding	Low	Monitor and review spend of such funding on other schemes within the development programme. Should insufficient funding be available, schemes will be prioritised and potentially some schemes put on hold until sufficient funding is available. MHCLG and Homes England funding has been confirmed which helps scheme viability.

Background Papers

Appendices

Appendix 1 Outlay and finding
Appendix 2 Financial Summary

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