

Public Document Pack

Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr

Bridgend County Borough Council



Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont, CF31 4WB / Civic Offices, Angel Street, Bridgend, CF31 4WB

*Rydym yn croesawu gohebiaeth yn Gymraeg.
Rhowch wybod i ni os mai Cymraeg yw eich
dewis iaith.*

*We welcome correspondence in Welsh. Please
let us know if your language choice is Welsh.*



Cyfarwyddiaeth y Prif Weithredwr / Chief Executive's Directorate

Deialu uniongyrchol / Direct line /: 01656 643148 / 643694 / 643513 / 64369

Gofynnwch am / Ask for: Democratic Services

Ein cyf / Our ref:

Eich cyf / Your ref:

Dyddiad/Date: Tuesday, 5 March 2024

Dear Councillor,

CABINET

A meeting of the Cabinet will be held Hybrid in the Council Chamber Civic Offices, Angel Street, Bridgend, CF31 4WB / remotely via Microsoft Teams on **Tuesday, 12 March 2024 at 14:30.**

AGENDA

1. Apologies for Absence
To receive apologies for absence from Members.
2. Declarations of Interest
To receive declarations of personal and prejudicial interest (if any) from Members/Officers in accordance with the provisions of the Members' Code of Conduct adopted by Council from 1 September 2008.
3. Approval of Minutes 3 - 10
To receive for approval the Minutes of 20/02/2024
4. Outcome Of The Consultation On The Draft Participation And Engagement Strategy 11 - 44
5. Housing And Homelessness Position Statement 45 - 52
6. Local Housing Market Assessment 2024 53 - 148
7. Non-Domestic Rates: Discretionary Relief: Retail, Leisure And Hospitality Rates Relief Scheme 2024-25 149 - 158
8. Proposed Use Of Land Transaction Transfer Protocol With Cardiff Capital Region for Land At Brynmenyn & Bryncethin 159 - 170
9. Welsh Public Library Standards 171 - 190
10. Procedure For The Appointment And Removal Of Local Authority Governors 191 - 208

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11.	<u>Appointment Of Local Authority Governors</u>	209 - 214
12.	<u>Schools Admissions Policy 2025-2026</u>	215 - 282
13.	<u>Home-To-School/College Transport Policy</u>	283 - 302
14.	<u>Information Report for Noting</u>	303 - 318
15.	<u>Cabinet, Council And Overview And Scrutiny Committees Forward Work Programmes</u>	319 - 332
16.	<u>Urgent Items</u> To consider any items of business that by reason of special circumstances the chairperson is of the opinion should be considered at the meeting as a matter of urgency in accordance with paragraph 2.4 (e) of the Cabinet Procedure Rules within the Constitution.	

Note: This will be a Hybrid meeting and Members and Officers will be attending in the Council Chamber, Civic Offices, Angel Street Bridgend / Remotely via Microsoft Teams. The meeting will be recorded for subsequent transmission via the Council's internet site which will be available as soon as practicable after the meeting. If you have any queries regarding this, please contact cabinet_committee@bridgend.gov.uk or tel. 01656 643148 / 643694 / 643513 / 643696

Yours faithfully

K Watson

Chief Officer, Legal and Regulatory Services, HR and Corporate Policy

Councillors:

JC Spanswick
N Farr
W R Goode

Councillors

J Gebbie
HJ David
HM Williams

Councillors

JPD Blundell

MINUTES OF A MEETING OF THE CABINET HELD HYBRID IN THE COUNCIL CHAMBER - CIVIC OFFICES, ANGEL STREET, BRIDGEND, CF31 4WB ON TUESDAY, 20 FEBRUARY 2024 AT 14:30

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Present

Councillor HJ David – Chairperson

JC Spanswick
HM Williams

N Farr
JPD Blundell

W R Goode

J Gebbie

Apologies for Absence

Janine Nightingale - Corporate Director – Communities

Officers:

Oscar Roberts
Carys Lord
Claire Marchant
Kelly Watson
Mark Shephard
Michael Pitman
Zak Shell
Alex Rawlin

Business Administrative Apprentice - Democratic Services
Chief Officer - Finance, Performance & Change
Corporate Director Social Services and Wellbeing
Chief Officer Legal, HR and Regulatory Services
Chief Executive
Technical Support Officer – Democratic Services
Head of Operations – Community Services
Corporate Policy & Performance Manager

Declarations of Interest

None

296. Outcome of the Consultation 'Shaping Bridgend's Future' 2024

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Decision Made	<p>The Chief Officer Finance, Performance and Change presented a report which informed Cabinet of the outcome of the 'Shaping Bridgend's Future' 2024 budget consultation which asked citizens their views on what they consider should be the priority areas for allocating the budget for the forthcoming financial year, and to examine those views against funding provided by the Welsh Government.</p> <p>She explained that the consultation received 2,839 interactions from a combination of survey completions following attendance at engagement events (face-to-face drop-in sessions), social media engagement and via the Council's Citizens' Panel.</p> <p>The full consultation report was provided at Appendix A to the report.</p> <p>The Cabinet Member for Finance, Resources and Legal commented on the point made on keeping Council tax at a minimum. While this was shared amongst all Members, there was a risk to service delivery if the Council tax was not set at a level that helped balance the budget.</p> <p>The Cabinet Member for Climate Change and the Environment commented on the point made on the services that the public are willing to cut, one being the Net Zero agenda. Whilst he supported the views of the public, he asked that the public bear in mind that we also had a duty to become Net Zero by 2030. He added that going forward, we needed to ensure that we were engaging with the public further</p> <p>The Cabinet Member for Housing, Planning & Regeneration added that it was important to engage with schools as many younger people will not necessarily be paying Council tax yet, but will be able to vote in upcoming elections.</p> <p>Cabinet Members discussed the need for us to continue to do better with regards to engagement and ensuring that the public have their say, particularly during the budget setting processes.</p> <p><u>RESOLVED:</u> Cabinet noted the outcome of the consultation as detailed in the attached consultation report.</p>
Date Decision Made	20 February 2024

297. Medium Term Financial Strategy (MTFS) 2024-25 to 2027-28

Page 5

Decision Made	<p>The Chief Officer Finance, Performance and Change presented a report which presented Cabinet with the Medium-Term Financial Strategy 2024-25 to 2027-28, attached at Annex 3 (along with associated appendices), which includes a financial forecast for 2024-28, a detailed revenue budget for 2024-25 and a Capital Programme for 2024-25 to 2033-34, and to recommend that these are presented to Council for approval on 28 February 2024.</p> <p>She explained that the Council is required to approve a balanced budget for the following financial year and set the council tax rates for the County Borough. This report sets out proposals to achieve that objective and contribute towards a sustainable financial position going into the medium-term.</p> <p>The Chief Officer Finance, Performance and Change stated that the financial settlement for Local Governments in Wales was not due to be announced until the end of February, and therefore this budget was proposed based on the provisional settlement which was received in December 2023. Any changes will be reported to Council in due course, however this will not affect the Council tax proposal.</p> <p>The Cabinet Member for Finance, Resources and Legal stated that upon receiving the draft MTFS document, it was noted that there was headroom of around £4million. This was presented to the Budget Research and Evaluation Panel (BREP) and the subsequent Scrutiny committees and sought their input on how to move forward. The budget setting process had been the most difficult that it has ever been, and unfortunately cuts have needed to be made to ensure the balance of the budget and minimizing risk to service delivery and council tax prices.</p> <p>The Cabinet Member for Housing, Planning & Regeneration highlighted that for many years BCBC have tried to ensure that the public are sheltered from the brunt of cuts and this had been evident in the council tax increases of previous years. He explained that last year the council tax was raised by a value lower than inflation and the year before that, the council tax was frozen for the year. Unfortunately, this was not possible any further while the budget cuts had to be made.</p> <p><u>RESOLVED:</u> That Cabinet recommended the MTFS 2024-25 to 2027-28, including the 2024- 25 revenue budget and the Capital Programme 2023-24 to 2033-34, to Council for approval. In particular, Cabinet approved the points set out in section 9.1 of the report.</p>
Date Decision Made	20 February 2024

238. Capital Strategy 2024-25

Decision Made	<p>The Chief Officer Finance, Performance and Change presented a report on the Capital Strategy 2024-25 to 2033-34 (Appendix A), which includes the Prudential Indicators against which the Council measures itself during the financial year and the Annual Minimum Revenue Provision Statement 2024-25 (Section 7 of Appendix A), before submitting to Council for approval.</p> <p>She explained that Strategy emphasizes the pressures currently being faced by the Council. Pressures on the Capital Programme include:</p> <ul style="list-style-type: none">• Increased prices of materials, as a result of the higher inflation rates currently in the UK and further afield, as well as additional costs associated with Brexit;• Supply chain difficulties leading to higher prices and delays in scheme being completed;• Recruitment challenges, both within the Council and in companies we contract with, resulting in higher wages and overall contract costs;• Additional requirements on schemes to achieve Welsh Government's Net Zero commitment, which includes an aim of collectively achieving net zero across the Welsh public sector, which will lead to changes in the way assets are designed and managed, which will likely result in increased costs. <p>The Cabinet Member for Finance, Resources and Legal asked if any further recommendations came from the scrutiny meetings. The Chief Officer Finance, Performance and Change explained that a suggest was made that BREP had sight of the Capital Strategy at an early stage to be able to feed into it going forward.</p> <p>The Cabinet Member for Finance, Resources and Legal made reference to the point under Principle 4 - ensuring that there is effective pre- and-post project appraisal including a "lessons learned" exercise. He asked that this be made available for inspection once it was carried out.</p> <p>The Cabinet Member for Climate Change and the Environment made reference to the Highways Asset Management Plan (HAMP) in the report. He asked that a report be bought to Cabinet that clearly set out the finances needed to keep our highways safe and useable for all. We have a statutory duty to do this and therefore we need to be clear on how we will do so.</p>
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	<u>RESOLVED:</u> that Cabinet considered the report and recommended that the Capital Strategy 2024-25 to 2033-34, including the Prudential Indicators 2024-25 to 2033-34 and the Annual Minimum Revenue Provision (MRP) Statement 2024-25 at Appendix A be presented to Council for approval.
Date Decision Made	20 February 2024

299. Treasury Management Strategy 2024-25

Decision Made	<p>The Chief Officer Finance, Performance and Change presented a report on the Treasury Management Strategy (TMS) 2024-25, which includes the:</p> <ul style="list-style-type: none"> • Borrowing Strategy 2024-25 • Treasury Investment Strategy 2024-25 • Treasury Management Indicators for the period 2024-25 to 2026-27. <p>The Chief Officer Finance, Performance and Change highlighted key areas withing Appendix 1, namely the Council's external debt and investment position as at 30 September 2023, The Council's balance sheet summary and forecast and the major objectors for the Council to follow during the 2024-25 financial year.</p> <p>Cabinet Members asked questions in relation to borrowing and investments which were answered in detail by the Chief Officer Finance, Performance and Change.</p> <p>The Cabinet Member for Housing, Planning & Regeneration asked what assurances are there that investments are made within good practices. The Chief Officer Finance, Performance and Change the Council confirmed that the Council needed to consider the Environmental, Social and Governance implications of decisions to invest, and these were set out in the CIPFA Code.</p> <p><u>RESOLVED:</u> That Cabinet:</p> <ul style="list-style-type: none"> • Considered the Treasury Management Strategy for 2024-25; and • Recommended that the Treasury Management Strategy be presented to Council for approval on 28 February 2024.
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CABINET - TUESDAY, 20 FEBRUARY 2024

Date Decision Made	20 February 2024
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300. Urgent Items

Decision Made	None
Date Decision Made	20 February 2024

To observe further debate that took place on the above items, please click this [link](#)

The meeting closed at 17:15

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	OUTCOME OF THE CONSULTATION ON THE DRAFT PARTICIPATION AND ENGAGEMENT STRATEGY
Report Owner / Corporate Director:	CHIEF OFFICER - FINANCE, HOUSING AND CHANGE
Responsible Officer:	ZOE EDWARDS - CONSULTATION, ENGAGEMENT AND EQUALITIES MANAGER
Policy Framework and Procedure Rules:	There is no impact on the policy framework or procedure rules.
Executive Summary:	To inform Cabinet on the outcome of the draft Participation and Engagement Strategy consultation and to seek approval of the Strategy for publication. The consultation was undertaken over a 12-week period: between 30th October 2023 to 22nd January 2024 and received 227 responses.

1. Purpose of Report

- 1.1 The purpose of this report is to inform Cabinet of the outcome of the draft Participation and Engagement Strategy consultation and approve the Strategy for publication.

2. Background

- 2.1 Public bodies have a duty to engage effectively with their residents. Communication is two-way and it is important that as well as giving out clear information, the public is heard. This Strategy (attached as **Appendix B**) sets out how Bridgend County Borough Council will achieve this.
- 2.2 There is a commitment to engage effectively, and this is underpinned by a range of legislation including the:
 1. Well-being of Future Generations (Wales) Act 2015
 2. Equality Act 2010,
 3. Welsh Language Measure 2011
 4. Local Government and Elections (Wales) Act 2021
- 2.3 Best practice and national standards have been followed, for example the Children and Young People's National Participation Standards and the National Principles for

Public Engagement in Wales. This Strategy sets out our corporate approach to engagement with the people of Bridgend.

3. Current situation / proposal

- 3.1 We want to ensure our residents and other key stakeholders are involved in key strategic decisions. The following aims have therefore been developed to ensure we achieve this:

Aim 1:

Bring all the Council's consultation, engagement, and participation activities together into a single, easily accessible online hub, with the long-term objective of developing a portal that joins together all pathways for participation in Bridgend County Borough.

Aim 2:

Ensure effective engagement and participation across Bridgend County Borough.

Aim 3:

Keep up to date with the latest and best methods of engaging with residents of Bridgend County Borough.

- 3.2 The attached consultation report (**Appendix A**) sets out in detail the views expressed by those who participated.
- 3.3 A public survey was available to complete online through a link on the consultation page of the Council's website. Paper copies of the consultation were also available, which could be sent directly to residents upon request. The consultation was sent out to our Citizen Panel, shared with Town and Community Councils and public engagement events were also held throughout the consultation period. Surveys were available in Welsh and English Language; alternative copies were available upon request. The content of the page remains online. Respondents could choose to answer all or some questions. All survey responses offered the option of anonymity.
- 3.4 In total, there were 227 responses to the public consultation, including online completions, paper completions and ideas submitted to our online ideas board.
- 3.5 **Social Media**
The Council currently has 14,766 followers on its English Twitter account and 369 on its Welsh Twitter account; 20,087 followers on its English Facebook page and 262 on the Welsh Facebook page; 3,335 followers on Instagram and 7,298 followers on LinkedIn and 209 subscribers on YouTube. Details of the success of the social media and website campaigns can be found in the full consultation report at **Appendix A**.
- 3.6 **govDelivery**
govDelivery is a digital communications platform that was introduced by the local authority in June 2020 to improve communication. It is currently used to issue Council updates directly to residents' email inboxes in the language of their choice. There are currently 35,158 English language and 280 Welsh language users who have subscribed to receive the Council's weekly update emails.
- 3.7 **Media and publicity**

A press release was issued to coincide with the start of the consultation, to raise awareness and encourage participation. This was released on 17th November 2023 <https://www.bridgend.gov.uk/news/consultation-launched-to-shape-council-s-new-engagement-and-participation-strategy/> . A last chance reminder of the Engagement and Participation consultation was included in news round-up on 19 January 2024. The Leader of the Council also shared in his regular update emails to his list of contacts which include local councillors, MP's, MS's.

3.8 Promotional materials

Staff Bulletin

Details of the engagement and participation survey were included in our weekly staff bulletin, which included links to the survey and strategy.

3.9 Throughout the consultation period there 7 engagement events, including public drop-in sessions, to encourage residents and members to share their views on the strategy. Details of the event were shared via the Council's social media.

Public consultation details:

- ❖ Bridgend Bus Station
- ❖ The Bridge
- ❖ Town and Community Council Forum
- ❖ Corporate overview and scrutiny committee
- ❖ Pyle Life Centre
- ❖ Ogmore Life Centre
- ❖ Garw Valley Life Centre

4. Equality implications (including Socio-economic Duty and Welsh Language)

4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, or socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

5.1 The well-being goals identified in the Act were considered in the preparation of this report. It is considered that there will be no significant or unacceptable impacts upon the achievement of well-being goals/objectives as a result of this report.

6. Climate Change Implications

6.1 There are no Climate Change Implications from this report.

7. Safeguarding and Corporate Parent Implications

7.1 There are no Safeguarding and Corporate Parent Implications from this report.

8. Financial Implications

8.1 The costs of carrying out the consultation were met from existing budgets.

9. Recommendation

- 9.1 Cabinet is recommended to note the outcome of the consultation and approve the Engagement and Participation Strategy attached as **Appendix B** for publication.

Background documents

None

Engagement and Participation Strategy

Consultation Report

Date of issue: February 2024

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1. Overview

Bridgend County Borough Council has developed a draft Participation and Engagement Strategy 2023 outlining the steps we will take as a Council to keep people well-informed about our services. To ensure our strategy reflects on our priorities, a public consultation was undertaken over a 12-week period, between 30th October 2023 to 22nd January 2024.

In total, there were **227 responses** to the public consultation, consisting of online completions, paper completions and ideas submitted to our online ideas board.

2. Introduction

A public survey was available to complete online through a link on the consultation page of the council's website. Paper copies of the consultation were also available, which could be sent directly to residents upon request. The consultation was sent out to our Citizen Panel, shared with Town and Community Councils, Youth council and public engagement events were also held throughout the consultation period.

Surveys were available in Welsh and English Language; alternative copies were available upon request. An easy-read version of the survey was also available to download from the consultation project page. Respondents could choose to answer all or some questions. All survey responses offered the option of anonymity.

3. Marketing and engagement methods

3.1. Marketing

This section details methods used to raise the profile of the consultation and encourage participation.

3.1.1. Social media

The council runs the following social media accounts: Twitter, Facebook, Instagram, LinkedIn, and YouTube.

The public consultation was posted bilingually to the council's corporate Twitter, Facebook, and LinkedIn channels throughout the consultation period, to raise awareness of the consultation and to encourage citizens to share their views on the strategy.

The council currently has over 20K Facebook followers and 14.7K followers on its English X (Twitter) account, and 369 on its Welsh X (Twitter) account. While content is most likely to be seen by these users, it is also displayed to users who are not connected to the accounts.

The below table shows engagement rates with social media posts promoting the Engagement and Participation Strategy throughout the consultation period.

	Impressions	Comments	Shares	Link clicks
English	18,976	29	19	66
Welsh	106	0	0	0
Total	19082	29	19	66

3.1.2. Engagement HQ

Engagement HQ is a digital engagement platform that was implemented by the local authority in December 2022, to support the council's online consultation and engagement activities. The platform is available in both English and Welsh Language.

The online survey was published using Engagement HQ, with the link available on the consultation page of the council's website.

Visitors Summary

Be involved, Bridgend from 30 Oct'23 to 22 Jan'24



The above image shows an overview of visitors to the Engagement and Participation Strategy project page on Engagement HQ.

The table below shows a highlight of traffic to the Engagement HQ project page for the Engagement and Participation consultation.

Aware visitors	1,000
Informed visitors	454
Engaged visitors	219
Visits referred from social media	143
Visits referred from council's website	59
Visitors from search engine	12
Direct	419

Aware visitors: A visitor that has made at least one single visit to the site or project page, and is therefore 'aware' of the project, but has not clicked anything or participated in the survey.

Informed visitors: An informed visitor has taken the 'next step' from being aware and clicked on something. E.g., viewed key dates, a document. or clicked on the survey (An informed visitor is also always aware)

Engaged visitors: These are visitors that have engaged with the project by submitting a response to the survey. (This means a visitor cannot be engaged without also being informed and aware)

3.1.3. Media and Publicity

A press release was issued to coincide with the start of the consultation, to raise awareness and encourage participation. This was released on 17th November 2023

<https://www.bridgend.gov.uk/news/consultation-launched-to-shape-council-s-new-engagement-and-participation-strategy/>

A last chance reminder of the Engagement and Participation consultation was included in news round-up on 19 January 2024.

Cllr Huw David (Leader of Bridgend Council) also shared in his regular update emails to his list of contacts which include local councillors, MP's, MS's.

3.1.4. Gov Delivery

GovDelivery is a digital communications tool that was implemented by the local authority in June 2020, to send messages directly to residents' email inboxes in the language of their choice.

There are currently 35,158 English language subscribers and 280 Welsh language subscribers from Bridgend County Borough to the weekly update emails.

Details of the Engagement and Participation public consultation was included in Gov Delivery bulletins throughout the duration of the live period.

In total 4 bulletins were sent out including the Engagement and Participation consultation, which included links to the strategy and online survey.

The table below shows when details were included in bulletin as well as the number of click through links in both English and Welsh language.

Date	Total English Link Clicks
2 November 2023	33
23 November 2023	16
14 December 2023	11
21 December 2023	19

3.1.5. Staff Bulletin

Details of the engagement and participation survey were included in our weekly staff bulletin, which included links to the survey and strategy.

The table below shows when details were included in the staff bulletin, as well as the total number of clicks.

Date	Total English Link Clicks
4 January 2024	738

3.2. Engagement Events

Throughout the consultation period there were 7 engagement events held, including public drop-in sessions, to encourage residents and members to share their views on the strategy.

Details of the event were shared via the council's social media.

Public consultation details:

- Bridgend bus station
- The Bridge
- Town and Community Council Forum
- Corporate overview and scrutiny committee
- Pyle Life Centre
- Ogmore Life Centre
- Garw Life Centre

As shown below, a promotional poster was created highlighting the aims and ambitions of the Engagement and Participation strategy. This was taken to engagement events to gather views of residents and stakeholders. The poster was created in both English language and Welsh Language and included a QR code which residents could scan to direct them straight to the online survey.

ENGAGEMENT AND PARTICIPATION STRATEGY CONSULTATION

This is also available in Welsh Language

Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

Bridgend County Borough Council has a duty to engage effectively with the people of Bridgend. Communication is two-way and it is important that we listen to and take on ideas from the public as well as giving out clear information.

OUR AIMS & AMBITIONS

Bring all the council's consultation, engagement, and participation activities together into a single, easily accessible online hub, with the long-term objective of developing a portal that joins together all pathways for participation in Bridgend County Borough.

Keep up to date with the latest and best methods of engaging with residents of Bridgend County Borough.

Ensure effective engagement and participation across Bridgend County Borough.

HAVE YOUR SAY

We'd like to hear your views and observations on our aims and ambitions, you can feedback to us through scanning the QR Code or through the following link:
<https://beinvolvedbridgend.uk/engagementhq.com/engagement-and-participation-strategy-consultation>
Closing date: 22 January 2024



STRATEGAETH YMGYSYLLTU A CHYFRANOGIAD YMGYNHORIAD

Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr
BRIDGEND
County Borough Council

Mae gan Gyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr ddyletswydd i ymgysylltu'n effeithiol â phobl Pen-y-bont ar Ogwr. Mae cyfathrebu'n broses ddwy ffordd, ac mae'n bwysig ein bod yn gwrandao ar syniadau'r cyhoedd, yn ogystal â chyflwyno gwybodaeth glir

EIN NODAU A'N HUCHELGEISIAU

Dod â holl weithgareddau ymgynghori, ymgysylltu a chyfranogiad y Cyngor at ei gilydd mewn un hwb ar-lein hawdd cael ato, gyda'r amcan hirdymor o ddatblygu porth sy'n uno pob llwybr ar gyfer cyfranogiad ym Mwrdeistref Sirol Pen-y-bont ar Ogwr.

Sicrhau ymgysylltiad a chyfranogiad effeithiol ar draws Bwrdeistref Sirol Pen-y-bont ar Ogwr.

Cadw i fyny â'r dulliau diweddaraf a gorau o ymgysylltu â thrigolion Bwrdeistref Sirol Pen-y-bont ar Ogwr.

DWEUD EICH DWEUD

Hoffem glywed eich barn a'ch sylwadau ar ein nodau a'n huchelgeisiau, gallwch roi adborth i ni drwy sganio'r Cod QR neu drwy'r ddolen ganlynol: <https://cymrwch-ranpen-y-bontarogwr.uk/engagementhq.com/arolwg-strategaeth-ymgysylltu-a-chyfranogiad>
Dyddiad cau: 22 Ionawr 2024



4. Response Rate

In total there were **227** submissions to the public consultation. There were **223** total responses to the survey, **214** responses were submitted through the online survey, and **9** responses were submitted as a paper copies. **4** submissions were made through our online ideas board.

5. How effective was the consultation?

The data collection methods, which include the online survey and a paper survey were developed using plain English to maximise understanding. An easy-read version of the survey was also available to download from the consultation project page. These response methods were designed to give consistency to the survey across multiple platforms.

6. Questions and analysis - consultation Survey

6.1. Language used to complete the survey.

Respondents to the consultation survey were initially asked in which language they would like to complete the survey. Overall, 100% of respondents selected English with 0% selecting Welsh.

Language	#	%
English	223	100%
Welsh	0	0%
Total	223	100.0

7. Survey Questions and Analysis:

This section outlines and analyses all questions asked in the online survey. All questions were optional, so participants could choose to answer all or some questions.

Aims and ambitions.

We want to ensure our residents and other key stakeholders are involved in key strategic decisions.

The following aims have therefore been developed to ensure we achieve this.

Aim 1:

Bring all the Council's consultation, engagement, and participation activities together into a single, easily accessible online hub, with the long-term objective of developing a portal that joins together all pathways for participation in Bridgend County Borough.

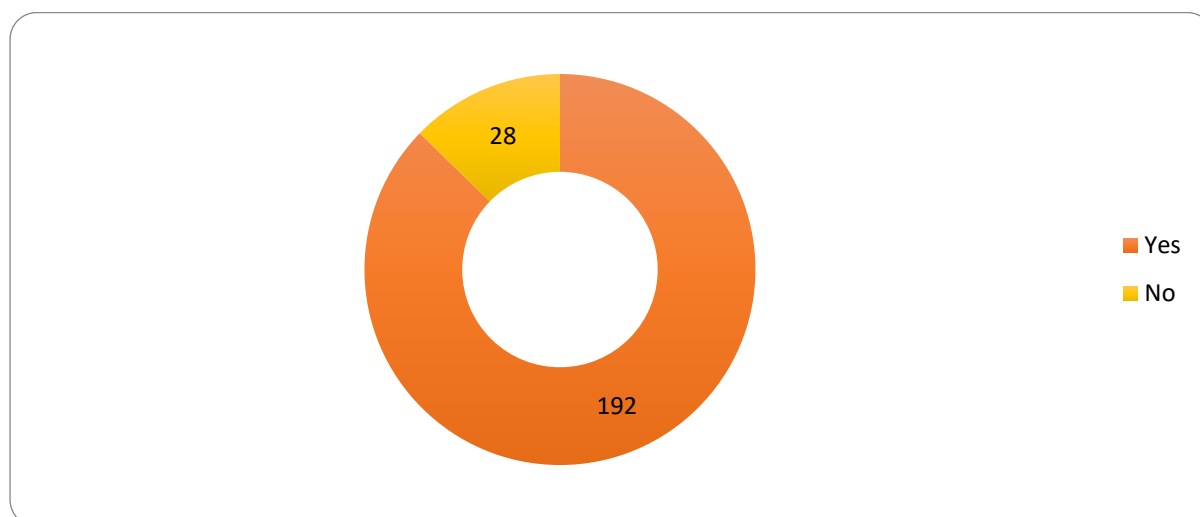
Aim 2:

Ensure effective engagement and participation across Bridgend County Borough

Aim 3:

Keep up to date with the latest and best methods of engaging with residents of Bridgend County Borough.

Are you satisfied with proposed aim 1?



220 respondents submitted a response for this question. 87% of respondents state they agree with aim 1. Whereas 13% of respondents stated they disagree with the aim to bring all the Council's consultation, engagement, and participation activities together into a single, easily accessible online hub, with the long-term objective of developing a portal that joins together all pathways for participation in Bridgend County Borough.

If no, please tell us why:

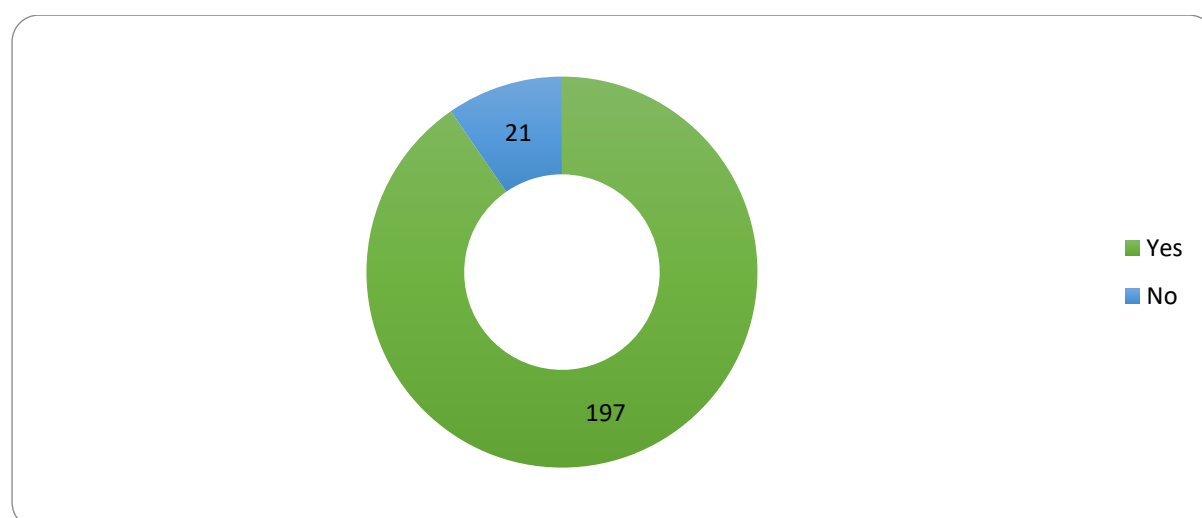
Those respondents that selected they disagree with aim 1 were asked to share further details for their response.

28 respondents provided a further comment. All comments have been themed into the table below.

Theme	Number of respondents
Online only is not accessible to all / Excludes those not online	7
Do not understand aim / further explanation needed	6
Residents' views are not listened to	2
Assuming unsatisfactory completion.	1
No consultation with residents from Porthcawl	1
Prefer to keep opinions private	1
Misunderstanding of aim	1
No engagement with residents of Porthcawl	1
BCBC needs to promote more meaningful and transparent engagement	1
Not an accessible consultation	1
One portal is too hard to navigate / not effective	2
Face to Face consultation is more effective	2
Must be alternatives to the online portal	1
Need measurable timescales	1
Grand Total	28

The top 3 themes identified for this question are as followed; 7 respondents highlighted that an online portal is not accessible to all. 6 respondents do not understand the aim, and further information would be useful. 2 respondents feel that residents views are not listened to.

Are you satisfied with proposed aim 2?



218 respondents submitted a response for this question. 90% of respondents state they agree with aim 2, whereas 10% of respondents disagree with the aim to 'Ensure effective engagement and participation across Bridgend County Borough.

If no, please tell us why:

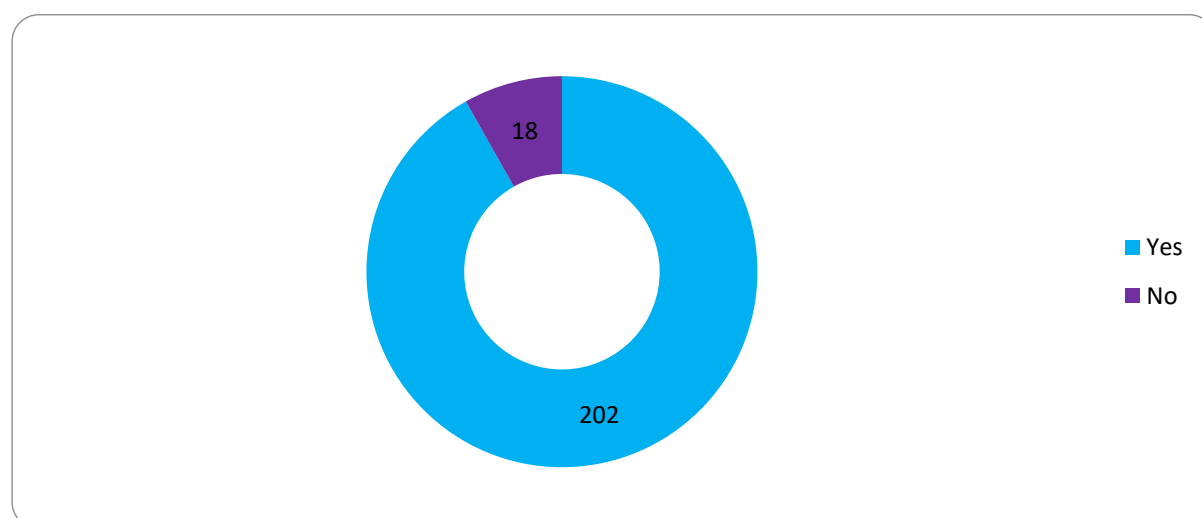
Those respondents that selected they disagree with aim 2 were asked to share further details for their response.

21 respondents provided a further comment. All comments have been themed into the table below.

Theme	Number of respondents
Need more information and measurable aims	8
Aim is too generic, need to be more transparent	2
Negative feedback on the provided service.	1
BCBC doesn't care about the Public	1
Not enough to ensure voices are heard	1
BCBC should have more involvement with the Public	1
Prepaid mail questionnaires should be offered to all households	1
Should be aim number 1	1
Focus on accessibility for all	1
Link with community groups and partners	1
Comments unrelated to consultation	3
Total	21

The top themes identified for this question are as followed; 9 respondents mentioned that more information and measurable aims should be provided. 2 respondents believe that the aim is too generic and further transparency is needed.

Are you satisfied with proposed aim 3?



220 respondents provided a response for this question. 92% of respondents state that they agree with the proposed aim 3. Whereas 8% of respondents disagree with

the aim to Keep up to date with the latest and best methods of engaging with residents of Bridgend County Borough.

If no, please tell us why:

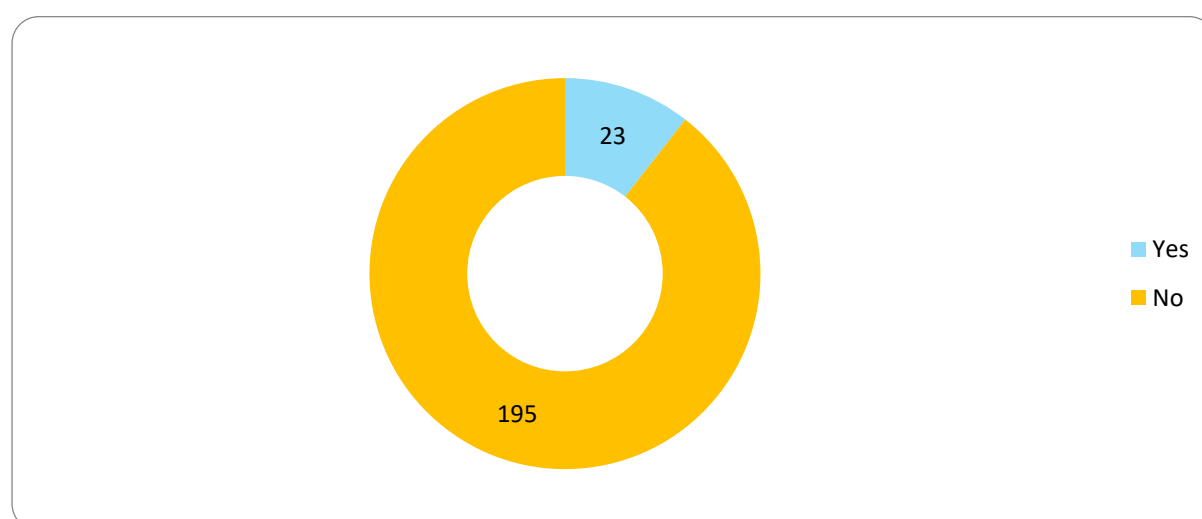
Those respondents that selected they disagree with aim 3 were asked to share further details for their response.

17 respondents provided a further comment. All comments have been themed into the table below.

Theme	Number of respondents
Unambitious aim. BCBC should be doing so already	4
Online will result in being less accessible	3
BCBC should have a more active involvement with residents	2
Further information needs to be provided	3
What expenses are involved	1
Inclusion aim and monitoring engagement would be more effective	1
Stagnant approach - Should focus on implementing latest methods.	1
Comments unrelated to consultation	2
Total	17

The top themes identified for this question are as follows; 4 respondents mentioned that aim 3 is an unambitious aim that BCBC should already be providing. 3 respondents highlighted that focusing on online engagement will result in BCBC becoming less accessible. 2 further respondents feel that BCBC should have a more active involvement with residents.

Are there any aims you think should be removed?



218 responses were provided for this question. 89% of respondents selected no, for any aims to be removed. Whereas 11% of respondents stated there are aims they think should be removed.

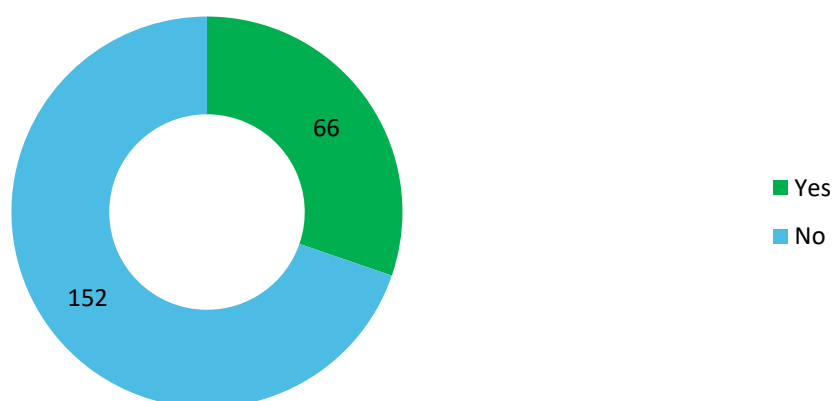
If yes, please state which aim, and why?

Those respondents that selected there are aims they think should be removed, were asked to share further details for their response.

22 respondents provided a further comment. All comments have been themed into the table below.

	Number of responses	Reasons provided for the removal of aim:
Aim 1	3	<ul style="list-style-type: none"> • Not realistic
Aim 2	3	<ul style="list-style-type: none"> • Aim is covered in aim 1. • Aim is not helpful
Aim 3	5	<ul style="list-style-type: none"> • Aim is not helpful. • Should be focused on ensuring there are inclusive and preferred methods for Bridgend residents to keep up to date, being inclusive of language, age, and preference. • Should already be in action. • Should be: 'Enable BCBC residents to contribute to proposals so that their voices are heard and reflected in the decision-making processes'
All Aims	3	<ul style="list-style-type: none"> • Aims are not clear and measurable.
Comments unrelated to question	4	
Other comments	4	<ul style="list-style-type: none"> • Residents should be the priority. • Aims are digitalised, are not inclusive to all residents

Are there aims you think should be added?



218 respondents submitted a response for this question. 69% of respondents state there are not any further aims to add. Whereas 31% of respondents think there are other aims that should be added to the strategy.

If yes, please state which aim and why?

Those respondents that selected there are aims they think should added, were asked to share further details for their response.

64 responses were received for this question. All responses are themed into the table below:

Suggested aims unrelated to Engagement and Participation	14
Aim to be more inclusive and engage with all residents	10
Aim focuses on Face-to-Face engagement and communication.	8
Aim to be more inclusive transparent with residents through decision making processes	7
Aim focused on providing timely feedback on results and decisions from consultation and engagement processes	4
Aim to ensure views and needs of residents are considered and listened to in decision making processes	4
Ensure all aims are consulted on with clear explanations and measurable targets	3
Aim to be fair in all decisions making processes across the whole council	1
Aim focused on ensuring there are multiple and accessible methods for residents to feedback on decision making	1
Aims to be actioned	1
Aim focused on involving younger generations in the process	1
Aim 2 - Enable citizens to participate in proposals and decision-making processes by ensuring effective communication, engagement, and participation across Bridgend County Borough	1
Aim to be more understanding and inclusive of Welsh speaking residents	1
Aims considering socio economic disadvantage and other protected characteristics	1

Further information and measures required for aim 2 and 3	1
Engage with local community town councils	1
Accessible public meetings for residents to get involved	1
Aim to provide an inclusive hub, accessible for all residents. Both offline and online.	1
Aim to support community lead engagement and consultations	1
Paper copies should always be available	1
No additional budget should be accounted for, utilise platforms already available.	1
Total	64

The table above shows what aims respondents think should be added to the Engagement and Participation strategy. The top themes for aims are as follows; 10 respondents believe an aim should be added that focuses on being more inclusive and engage with all residents within Bridgend County Borough. 8 respondents mentioned adding an aim that focuses on Face-to-Face engagement and communication, not just an online hub. 7 respondents suggested adding the aim to be more inclusive and transparent with residents throughout decision making processes.

Please leave any further comments regarding our Engagement and Participation strategy below:

75 comments were received for this question. All suggestions have been themed into the table below.

Comment	Number of respondents
To ensure inclusivity, advertise engagement opportunities widely, including offline options for elderly and vulnerable individuals.	11
Comments unrelated to Engagement and Participation strategy	8
Residents need to be listened to and transparency during process is required	8
Communications s be easy to read, avoiding unnecessary information that can make it difficult to understand the main objective.	6
One online portal is limiting, should utilise various tools for all demographics	5
The focus should be on improving people's quality of life, enhancing residents' well-being, and ensuring their safety and happiness.	2
Strategy is vague, needs methodology and timescales	2
Partnership working and lived experience is key to making informed decisions	2
People need to be able to easily access relevant information and services.	2
Strategy is not clear enough or shows how it effects the public	2
Comment on cost of the proposals	2
Happy with the strategy	2

Suggestion to increase character count on surveys	1
Waste of time	1
Decisions are made before the public are listened to	1
Execution is crucial to ensure that aims are both meaningful and effective.	1
Negative feedback regarding Council Tax system	1
Good start	1
Unhappy with the wording of key stakeholders	1
Progress should be monitored throughout implementation	1
Consultations should have a feedback form to evaluate against objectives.	1
Residents input is ignored	1
Suggestion to improve existing functions of BCBC instead of introducing new policy initiatives.	1
Allow face to face engagement	1
The council's objectives are good, but their methods are inadequate. It's important to seek and consider public input to increase the chances of success.	1
BCBC needs customer-focused people to improve its reputation and service levels, as face-to-face customer service is currently lacking.	1
The strategy is satisfactory but should be revised.	1
Town and Community councils should be consulted with	1
Effort and time should be utilised on paid media to increase footfall to BCBC's current platforms.	1
To ensure that all residents' voices are heard, a more comprehensive approach to engagement is necessary.	1
Use more visuals when sharing information like images, videos, graphs, and infographics with captions to ensure accessibility for people using read aloud software.	1
Strategy is poor and needs improvement	1
Strategy needs to be actioned on	1
Too much information for one Hub	1
Documents needs to be fully accessible	1
Suggestion to involve experienced engagement professionals to improve the organization's image and resident's trust.	
Grand Total	75

The top themes identified for this question are as follows; 11 respondents suggested in order to ensure inclusivity, the council should advertise engagement opportunities widely including offline options for elderly and vulnerable individuals. 6 respondents mentioned that its important residents are listened to and transparency during process is required. 6 respondents also stated that communications should be easy to read, avoiding unnecessary information that can make it difficult to understand the main objective.

8. Ideas Board

As part of the consultation process a virtual ideas board was published along side the survey on our Engagement HQ project page. The ideas board was focused on the below question:

In addition to our existing methods to encourage participation, are there any other ways you would prefer to engage and get involved with us?

Suggestions submitted to the virtual ideas board are shown below:

Title	Description
Engagement methods: social media, Seaside news, in person	Better facilities & leisure activities for all generations. We want to keep our town as a seaside tourist resort. Please don't take that away from us.
Social media	More social media content aimed at young people - in an understandable way.
Youth Engagement Sessions	Engaging with young people in Bridgend such as Youth Council etc., schools and youth clubs
Social Media	More relatable social media platforms i.e., TikTok

9. Conclusion

Bridgend County Borough Council has developed a draft Participation and Engagement Strategy 2023 outlining the steps we will take as a Council to keep people well-informed about our services. To ensure our strategy reflects on our priorities, a 12-week public consultation was undertaken focused on the proposed 3 engagement and participation aims:

Aim 1: Bring all the Council's consultation, engagement, and participation activities together into a single, easily accessible online hub, with the long-term objective of developing a portal that joins together all pathways for participation in Bridgend County Borough.

Aim 2: Ensure effective engagement and participation across Bridgend County Borough

Aim 3: Keep up to date with the latest and best methods of engaging with residents of Bridgend County Borough.

In total, there were **227 responses** to the public consultation, including online completions, paper completions and ideas submitted to our online ideas board.

The consultation document was available in both Welsh Language and English Language. An easy-read version of the survey was also available to download from the consultation project page. Respondents were able to select online or request paper surveys in all formats.

9.1. Equality Impact Assessment

An initial Equality Impact Screening assessment was completed to identify any negative impacts of the Engagement and Participation strategy and was presented to cabinet alongside the strategy.

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Bridgend County Borough Council

Engagement and Participation Strategy

This document is also available in Welsh.

Foreword

We recognise that local people should be involved in decisions about public services and policies that affect their lives.

Our Participation and Engagement Strategy 2023 has been developed to outline the steps we will take as a Council to keep people well-informed about our services.

With a wide selection of channels available to us, we want to ensure that we offer the best opportunity to listen and respond to people's views and engage with all members of our community around the services we deliver for the people of Bridgend County Borough.

We know that by working with citizens and involving them in the decision-making process, by addressing their concerns through consultation and involving them early in the process, we will be in a much better position to make key decisions about changes that can affect them.

We want to build trusting relationships within our local communities and improve our accessibility and accountability to local people.

As we have set out in our 'Delivering Together' Corporate Plan 2023–28, we have committed to consulting with the public on an annual basis and publishing our self-assessment of how we have done in the previous year.

We want to achieve more than this though, by ensuring that public engagement and participation is an integral part of our planning and decision-making process. This strategy will ensure that by regular engagement with local people, we are in a stronger position to develop services that meet the needs and improve outcomes for our local communities.

This strategy will not only look to improve existing engagement methods but will also identify new and emerging ways to engage with as many people in our communities as possible.

Mark Shephard, Chief Executive

Council Leader, Huw David

Introduction

Bridgend County Borough Council has a duty to engage effectively with the people of Bridgend. We believe that good engagement is the responsibility of everyone who works for the Council. Communication is two-way and it is important that we listen to and take on ideas from the public as well as giving out clear information. This strategy sets out how we will do this.

We are committed to engage effectively and this is underpinned by a range of legislation including:

- The Well-being of Future Generations (Wales) Act 2015
- The Equality Act 2010,
- The Welsh Language Measure 2011
- Local Government and Elections (Wales) Act 2021

We will also follow best practice and national standards, for example the Children and Young People's National Participation Standards and the National Principles for Public Engagement in Wales. This strategy sets out our corporate approach to engagement with the people of Bridgend County Borough.

The principle of this strategy is to promote choice, independence and collaborative working. Bridgend County Borough Council wants to listen, to understand people's needs and work with them to fulfil those needs.

The council engages with all key stakeholders of Bridgend County Borough.

The area we cover

Bridgend county borough covers around 100 square miles with a population of 145,760 in the 2021 census. In our population –

- 50.6% are female and 49.4% are male.
- 1.48% of people identify as Asian, 0.29% identify as black, 1.16% identify as mixed race, 96.78% identify as white and 0.29% identify as other ethnic group.
- 17.9% of people are aged 0-15, 61.4% are 16-64 and 20.7% are 65+.
- 22.64% of our population have reported disabilities that limit their day-to-day activities a little or a lot.
- 91.03% of people are straight, 1.35% are gay or lesbian, 0.95% are bisexual and 0.20% are other. 6.47% did not answer that question
- 94.4% of people are the same gender as registered at birth, 5.33% didn't answer the question
- 0.12% have a different gender identity to that registered at birth: 0.06% are trans women, 0.05% are trans men, 0.02% are non-binary and 0.02% are other sexual orientations

Our Participation Duties

As a Local Authority we have statutory duties to involve communities in shaping our services. However, our principal reason for involving communities in our processes is because we see the value communities add to discussions, and the great improvements in council services that come from having people involved in planning and decision-making processes.

Feedback suggests we could be more consistent in inviting and enabling participation and engagement, improve how we share learning and experiences to make the most of our collective community resource, as well as improve communication and feedback on engagement processes to demonstrate impact.

This feedback has informed the key strands of our strategy.

The Local Government and Elections (Wales) Act 2021 places a number of duties on local authorities regarding participation. These are to:

1. Promote awareness of the functions the Council carries out for local residents, businesses and visitors.
2. Share information about how to go about becoming an elected Member, or Councillor, and what the role of Councillor involves.
3. Provide greater access to information about decisions that have been made, or that will be made by the Council.
4. Provide and promote opportunities for residents to provide feedback to the Council, including comments, complaints, and other types of representations.

Engagement Principles

We have signed up to **The National Principles for Public Engagement in Wales**

which gives guidance for best practice on citizens engagement. This ensures information provided is jargon free, appropriate, and understandable.

- Participation: People being actively involved with strategy makers and service planners from an early stage of policy and service planning and review
- Consultation: A formal process by which policy makers and service providers ask for the views of interested groups and individuals
- Engagement: An active and participative process by which people can influence and shape policy and services that includes a wide range of different methods and techniques
- Co-production: An asset-based approach to public services that enables people providing and people receiving services to share power and responsibility, and to work together in equal, reciprocal, and caring relationships.
- Involvement: requires organisations to be open to influence from citizens and stakeholders, moving to a culture of “working with” rather than “doing to” and being supported to remain involved through the process.

Engagement and Participation methods

It is important that our communities have a clear understanding about the purpose of any activity that is designed to involve them, so that it is clear to them whether, and to what extent, they can influence decisions being made.

We currently use a range of different methods to encourage residents and businesses across the County Borough to get involved in key council decisions. Current methods are detailed below:

Methods	
Bridgend County Borough Council website	Contains the latest information about what's going on, the services we provide and how you can get involved.
Citizens Panel	Made up of a group of people who live in Bridgend County Borough and are regularly consulted on services run by the council by signing up here: https://www.bridgend.gov.uk/my-council/consultations/citizens-panel/
Digital communication platform	Residents can subscribe to choose the news or updates they want to receive.
Digital engagement platform	An opportunity for residents and others to contribute to decision making by taking part in consultations. These are available on the website during the consultation period and advertised via our social media platforms.
My Account	Reporting issues to the Council using our online forms Managing your council tax account online Managing your housing benefit account online Request pest control visit (domestic properties only) Apply for school admissions and free school meals
Social Media	A presence on social media sites Twitter, Facebook, Instagram, and YouTube
Chatbot	Conduct an online chat conversation via text or text-to-speech, finding answers to a wide variety of queries instantly.
In person	Residents and businesses can get involved with engagement and participation activities by attending our Civic offices, local libraries and community-based consultation events.
Petitions	An ePetition is a petition which collects signatures online.

Methods	
	<p>Anyone who lives, works or studies in the area can submit or sign an ePetition.</p> <p>ePetitions are part of the Council's ongoing commitment to listening to and acting on the views of the public.</p> <p>Details relating to ePetitions can be found under the Council's Petition Scheme</p>
Out-of-hours Customer Services	Emergency issues such as homelessness, highways and more
Concerns and formal complaints policy	<p>Opportunities to feedback any concerns or complaints you may have about our services.</p> <p>Information can be found on Bridgend Council's website</p>
Bridgend Public Services Board	Brings together public bodies who deliver services locally to improve the social, economic, environmental, and cultural wellbeing of Bridgend.
Webcasting	Join Committee meetings live or playback, as well as accessing meeting agendas and reports and the ability to contribute to certain meeting such as Development Control Committee.
Contacting your Councillor	A full list of Councillors' contact details by ward are available on Bridgend County Borough's website, for residents to discuss issues or concerns within their ward.
Council public meetings	Members of the public are able to attend Civic Offices to view public meetings in person, live online, as well as ask questions in line with section 4.18 of Bridgend County Borough Council's Constitution .
Watching / Getting involved in council meetings	The majority of council meetings are recorded and streamed live online for residents to watch, as well as being stored in the archive for residents to refer to at a later time.
Overview and Scrutiny Committees	<p>The public and other stakeholders can get involved in scrutiny by providing evidence to a committee, suggesting an items for scrutiny by completing a request form, or by speaking at a committee as a representative. Further information can be found on https://www.bridgend.gov.uk/my-council/democracy-and-elections/overview-and-scrutiny-committees/.</p>
Becoming a member of the council	Anyone who meets certain qualifying criteria, can stand at the next Local Elections in May 2027 to represent their community as a Councillor in the Council and have their say in how things

Methods	
	are run in Bridgend. 'Be a Councillor' awareness sessions are run about 6 months prior to the elections. https://www.bridgend.gov.uk/my-council/democracy-and-elections/have-you-thought-about-becoming-a-councillor/
Engaging with Town and Community Councils	Town and Community Councils contact information is available on the Council's website. https://democratic.bridgend.gov.uk/mgParishCouncilDetailsList.aspx

Your Council's 7 Wellbeing Objectives

Your Council has 7 wellbeing objectives in place and this Strategy has been developed in line with these to ensure all key stakeholders across Bridgend County Borough are involved in key strategic decision. The Council's wellbeing objectives are:

- A County Borough where we protect our most vulnerable
- A County Borough with fair work, skilled, high-quality jobs and thriving towns
- A County Borough with thriving valleys communities
- A County Borough where we help people meet their potential
- A County Borough that is responding to the climate and nature emergency
- A County Borough where people feel valued, heard and part of a community.

A County Borough where we support people to live healthy and happy lives to achieve these objectives whilst ensuring effective engagement and participation, we aim to do the following:

	<u>Aim</u>	<u>Method</u>
Inform	<p>Providing appropriate (balanced and objective) information about services, policies, and decisions to highlight the issues or problems to be solved, and the solutions being considered</p> <p>Or</p> <p>Collecting or using existing information about the views and needs of local people to inform services, policies, and decisions</p>	By using the appropriate communication and engagement methods to keep communities informed and by keeping information about the views and needs of local people accurate and updated to best inform the decision-making process across services
Consult	Offering an appropriate (one-off or time limited) opportunity to have a say about a service, policy, or decision	By keeping communities informed, offering timely opportunities to raise concerns and provide feedback, and by demonstrating the impact of engagement on decisions made
Involve	Providing opportunities to have a say and get involved in activities in a more influential and timely way (on an ongoing basis)	By collaborating with communities to ensure their concerns and their ambitions directly influence the options considered, and by demonstrating the impact of engagement on decisions made
Collaborate	Working in partnership in each aspect of the decision-making process, including developing and selecting the preferred solutions to issues or problems	By actively seeking advice and innovative ideas from communities to develop options for consideration and by incorporating that advice and those ideas into the final decisions taken
Empower	Where appropriate, empowering partners to lead decision making processes and/or placing the final decision in the hands of the community or relevant stakeholders	By listening to what those empowered have to say, accepting constructive feedback and comments and implementing what those empowered to drive decision making decide or recommend

Geographical communities

We will engage with citizens in specific locations as well as across the County Borough as a whole. This engagement will take place in our towns and the wider rural setting. We will also make sure that we engage with relevant communities of interest. This is where people have a shared characteristic, experience, or interest, for example carers, or those with specific expertise.

Equality Impact Assessments

When we make plans to create a new policy or change the way we do things, we must consider the impact this will have on our citizens, including those who have protected characteristics.

An Equality Impact Assessment (EIA) brings together the relevant legislations and sets out how we will take due regard, (give appropriate weight), to making decisions. Appendix A explains more about 'due regard'. When we carry out an EIA:

- We are considering relevant evidence to understand the likely or actual effects of policies or practices on those who are vulnerable within our communities, including those who are experiencing socio-economic disadvantage.
- We are thinking about where we might be able to reduce negative impacts.
- We are identifying missed opportunities and capitalising on positive impacts.
- We are considering the rights of the child.

These are characteristics that are protected by the Equality Act 2010. It is essential that we reach out to these communities so that we can capture their lived experiences, which will better inform our understanding of the impact of our actions and decisions. This feeds into our requirement to carry out Equality Impact Assessments. These characteristics are :

- Age
- Disability
- Gender reassignment
- Pregnancy and maternity
- Race – including ethnic or national origin, colour, or nationality
- Religion or belief – including lack of belief
- Sex
- Sexual orientation
- Marriage and civil partnership' (in terms of discrimination in employment).

Stakeholders

Carrying out a stakeholder analysis will help to identify key stakeholders and their levels of influence. We will also ensure that engagement is inclusive across the diverse make up of our communities. We will include people with protected characteristics and marginalised or seldom heard people and communities in our engagement.

Engagement with Elected Members

Elected Members are leaders within their communities and can provide important links to engage with a wide range of people. In addition to matters of interest to their wards, Elected Members may sit on several different Committees and will attend full Council meetings.

We will ensure Elected Members have the right information at the right time to enable them to engage with their constituents.

Engagement with Staff

We employ around 6,000 people. Our staff have a very wide base of experience and come from a diversity of backgrounds. We engage with our staff by several different means including staff news bulletins, e-mails, and surveys. We are in the process of developing a new staff portal for our staff to use, which will increase staff involvement, engagement, and communication. Human Resources directly engage with staff and unions on employment matters.

Engagement with Children and Young people

All children and young people have numerous rights. The right to have their views taken seriously, to freedom of expression, to have access to appropriate information, to have dignity, independence, and active participation in their community. These rights are protected under the United Nations Convention on the Rights of the Child (UNCRC) and the United Nations Convention on the Rights of Persons with Disabilities (UNCRPD). Meaningful engagement with children and young people across Bridgend will lead to services and policies being more relevant and appropriate to their needs.

Bridgend Youth Council are a diverse group of young people aged between 11-25 years. They actively work in partnership with Bridgend Council and other organisations to make positive changes for young people. We hold monthly meetings to discuss current issues faced by young people in Bridgend and how we can work towards resolving them.

Digital Engagement Platform

We will improve engagement through the development of a digital engagement platform specifically for consultation to give us the ability to create a cohesive series of engagement activities. The digital platform will enable us to organise engagement across the council services. Some examples of tools that can be utilised in a digital platform are:

- Surveys
- Quick polls

- Story walls
- Ideas sharing
- Timeline of engagement

It is hoped that through utilising these tools we can improve our engagement with citizens in Bridgend County Borough.

Evaluation, Feedback, Drawing Conclusions and Making Recommendations

We will feedback the results of our consultation and engagement activities in a variety of ways, such as publishing reports on our website and providing direct feedback to groups or organisations involved in our engagement. The feedback will summarise an evaluation of our engagement and also demonstrate how the engagement influenced and was considered with our decision making.

Our aims and ambitions

We want to ensure our residents and other key stakeholders are involved in key strategic decisions. The following aims have therefore been developed to ensure we achieve this.

Aim 1	Bring all the Council's consultation, engagement, and participation activities together into a single, easily accessible online hub, with the long-term objective of developing a portal that joins together all pathways for participation in Bridgend County Borough
Aim 2	Ensure effective engagement and participation across Bridgend County Borough
Aim 3	Keep up to date with the latest and best methods of engaging with residents of Bridgend County Borough

How will this be achieved

To achieve these aims, we will:

- Further develop our new digital consultation and engagement platform across a range of consultation/engagement activities
- Embrace the use of digital discussions, such as forums, social media live streams, webinar to further improve levels of engagement with Bridgend residents
- Maintain non-digital methods of community engagements to improve the overall levels of engagement across the county borough
- Make sure all council consultation and engagement activities are published in fully accessible formats,

- Improve levels of engagement with residents who have protected characteristics
- Ensure timely feedback is given on the outcomes from all consultation and engagement activities
- Continually review this Strategy to ensure it is kept up to date with the latest engagement developments
- Update the staff engagement toolkit to ensure consistency across all consultation and engagement activities
- Liaise with key partners across Wales to share methods of best practice
- Review feedback from residents and other key stakeholders to monitor and measure effectiveness
- Review and improve the way we inform people about the Council's responsibilities.
- Ensure that consultations with children and young people are more frequent, engaging and age appropriate.

Measuring Success

To measure the outcome of the implementation of this strategy, we will monitor:

- Site hits and registrations on both our digital engagement and communication platforms
- The number of responses and levels of engagement we receive to public engagement exercises
- Engagement levels with both the Scrutiny process and petitions.
- National Survey for Wales questions regarding Local Democracy
- Review how the consultation has impacted on policy development and service delivery
- Liaise with children and young people to ensure feedback has been given to them and actioned where appropriate.

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	HOUSING AND HOMELESSNESS POSITION STATEMENT
Report Owner / Corporate Director:	CHIEF OFFICER – FINANCE, HOUSING AND CHANGE
Responsible Officer:	MARTIN MORGANS HEAD OF PARTNERSHIPS AND HOUSING
Policy Framework and Procedure Rules:	This report is requesting a suspension of the Council’s Contract Procedure Rules (CPRs) but no amendment to the CPRs is being sought.
Executive Summary:	<p>A Housing Support Programme Strategy approved by Cabinet in December 2023 sets out the challenges the Council faces in terms of housing and homelessness services. A key challenge is the demand and associated cost of temporary accommodation.</p> <p>This report sets out some key pieces of work the Council is taking forward to address these challenges.</p> <p>The report seeks approval from Cabinet for the acquisition of properties to be utilised for temporary accommodation, with the intention of making medium term financial savings.</p> <p>The report also seeks approval to suspend the Council’s CPRs and enter into further agreements with private accommodation providers, in order to enable continuation of short-term arrangements, to meet statutory duties in relation to temporary accommodation.</p>

1. Purpose of Report

1.1 The purpose of the report is to:

- Update Cabinet as to the key pieces of work currently being taken forward to address pressures on housing and homelessness services;
- Seek approval from Cabinet for the acquisition of Housing in Multiple Occupation (HMO) style properties which are within the Council’s approved capital estimates for the purpose of providing temporary accommodation, subject to all reasonable due diligence and legal advice;

- Seek approval from Cabinet to suspend the relevant parts of the Council's Contract Procedure Rules (CPRs) with regards to the requirement to tender for a contract and delegate authority to the Head of Partnerships and Housing to enter into Service Level Agreements with existing accommodation providers for a period of 'up to' 12 months in order to continue the provision of additional temporary accommodation as necessary to meet the Council's statutory duties.

2. Background

- 2.1 In December 2023 Cabinet approved a final Housing Support Programme Strategy (Homelessness Strategy) and Action Plan for 2022-2026.
- 2.2 The Housing Support Programme Strategy outlines the challenges the Council faces in terms of increasing demands on homelessness services. The below statistics highlight the key challenges identified:
 - BCBC is facing unprecedented homelessness presentations, with numbers consistently higher than previous years. The period of 2020/2021 saw the highest level of presentations ever recorded by Bridgend County Borough Council (BCBC), 1,612 presentations.
 - The use of temporary accommodation has grown exponentially. Between 2018/19 and 2022/23 there was a 256% increase in the number of households in temporary accommodation. As of the end of February 2024 there are 495 individuals from 273 households in temporary accommodation. 202 (74%) of these households are either single persons or couples with no children.
- 2.3 The increase in demand for temporary accommodation is largely due to an 'All In' approach to homelessness, initially directed by Welsh Government at the start of the Covid 19 pandemic. Welsh Government introduced a Guidance Note which extended the definition of vulnerable with regards to the 'priority need' criteria set out in the Housing (Wales) Act 2014. In 2022 a new 'priority need' category was added, which in effect amended legislation to continue the principle of an 'All In' approach.
- 2.4 The demand for homelessness and temporary accommodation services has been compounded by a wider increase in demand for social housing. The total number of applicants on the Bridgend Common Housing Register at the end of each year has increased substantially. During 2019/2020 there were 816 applicants, in 2020/2021 that had increased by 81% to 1,477. During 2021/2022 the figure had increased by a further 45% to 2,143. As at the end of February 2024, there were 2,575 applicants on the Common Housing Register. A combination of the impact of the cost of living crisis and a challenging private rented sector are key drivers behind this demand.
- 2.5 The challenges highlighted at section 2.4 above are also key challenges in terms of moving households on from temporary accommodation, meaning households are spending longer in temporary accommodation.
- 2.6 To meet the demands on temporary accommodation highlighted above and ensure compliance with statutory duties to provide temporary accommodation the Council has entered into a range of agreements with private accommodation providers,

including those more traditionally used in the tourism sector, such as guest houses and holiday lets. Accessible accommodation for those with disabilities and larger accommodation for families are examples of some of the more costly units secured. The most recent arrangements put in place are due to expire at the end of March 2024.

- 2.7 The cost implications of the pressures on temporary accommodation are stark. The below table illustrates this, with a projected 3456% increase in costs between the end of 2017/18 to the end of 2023/24.

BCBC Temporary Accommodation Spend						
2017-18	2018-19	2019-20	2020-21	2021-22	2022-23	2023-24 (projected)
£134,698	£49,212	£135,260	£2,291,745	£3,129,711	£3,823,539	£4,790,000

- 2.8 BCBC has received increased income to help meet the costs outlined at 2.7. During the Covid 19 pandemic costs could be claimed from a Welsh Government Hardship Grant. This funding has since been replaced a Welsh Government 'No One Left Out' Grant, although not at the same levels. For 2022-23 this was £2.128m. For 2023-24 this reduced to £1.036m, a significant decrease on the previous year. Rental income from Housing Benefit for those accommodated is also received and has increased in line with placements. A core accommodation budget of £2.722m also supports these costs. The current net impact on finances is a projected over spend on homelessness accommodation of £705,000 for 2023-24.

3. Current situation/ proposal

- 3.1 As highlighted at section 2.1, on 19 December 2023 Cabinet approved a Housing Support Programme Strategy and Action Plan for 2022-2026. Sections 3.2 to 3.15 outline some key pieces of work which are being taken forward to meet the challenges highlighted in section 2, in particular with regards to temporary accommodation pressures.
- 3.2 **Expansion of Alternative to Bed & Breakfast Accommodation Service.** This service, initially commissioned in 2019 provides units of temporary accommodation with associated support intended to help individuals move to independent accommodation. In addition to providing suitable units of accommodation with support, these units are cost effective, compared to units of accommodation in the private sector.
- 3.3 The service was initially commissioned to provide 12 units of accommodation. The scheme has since been expanded and by the end of March 2024 the service will provide 64 units of accommodation, through a combination of shared and self contained units. Opportunities for further expansion will continue to be explored.
- 3.4 **Capital development to increase social housing units.** The housing development opportunities have been expanded in recent years with a number of capital funding opportunities available to Registered Social Landlords. These include Social Housing Grant (SHG), and Transitional Accommodation Capital Grant (TACP).

- 3.5 On 28 July 2022 the Welsh Government launched the £65 million TACP to support a wide range of projects by local authorities and registered social landlords to create extra housing capacity across Wales.
- 3.6 The programme intention is to bring an additional 1000 homes into use. This funding seeks to deliver schemes more quickly by being flexible on things such as space standards, types of accommodation funded, acquisition of properties, and the acceptance of a 'meanwhile' use for refurbished buildings or undeveloped sites for a short/medium period of time whilst more permanent decisions are made. 2023-24 has seen £4.25m transitional capital being invested in Bridgend creating an additional 41 units of accommodation.
- 3.7 SHG is the main capital grant provided by Welsh Government to fund the provision of affordable housing in Wales. Housing associations and local authorities can access this funding for the provision of building new homes and the rehabilitation of existing buildings to provide homes at social and intermediate rent. This grant is provided for local housing development over a rolling 3 year programme called the Programme Delivery Plan (PDP).
- 3.8 Expenditure of the SHG is approved and decided by Welsh Government after a series of concept, financial and technical scrutiny processes. The development journey can cross over several years to deliver. The information below is a guide as to the current PDP, however Cabinet should note that this is likely to change over time. Currently:
- Year 1 SHG (2023/24) - Committed spend £11,803,167
 - Year 2 SHG (2024/25) - Committed spend £4,675,806. Projected full year spend £13,129,808
 - Year 3 (2025/26) – Committed spend £3,519,500. Projected full year spend £13,129,808
- 3.9 There are currently 185 homes in development with a proposal of a further 141 across the rolling three year PDP. A total of 326 new homes is estimated over the three year PDP period. The PDP is fluid and updated every quarter, it is estimated that the proposed number of new homes will increase beyond that currently committed in the programme.
- 3.10 **Enhanced services to rough sleepers.** A recent commissioning exercise has ensured that assertive outreach and drop in services to rough sleepers will not only be continued, but enhanced. Provision will ensure accurate identification of rough sleepers across the county and ongoing attempts to engage with individuals, with support to take individuals off the street and into either temporary or long term accommodation.
- 3.11 In addition to the service referenced at section 3.10 a commissioning exercise in 2023 enabled the opening of a new supported accommodation service in October 2023. 'Ty Ireland' now provides 4 units of long term supported accommodation, with 24/7 support on site, enabling entrenched rough sleepers with complex mental health and or substance misuse issues to be accommodated on an ongoing basis. The service will work closely with our regionally commissioned health outreach service, which is delivered in partnership with Cwm Taf Morgannwg University Health Board and continues to receive funding support.

- 3.12 **Leasing Scheme Wales.** In November 2023 Cabinet gave approval to join the Welsh Government Private Rent Sector Leasing Scheme, with the aim of increasing the supply of suitable, affordable accommodation in the borough and reduce demand on homelessness services. The scheme has gone live and marketing is expected to increase from April 2024. This is a partnership model with private Landlords, with the aim of bringing properties from this sector into use for households who are in housing need. The cap at which Welsh Government will provide grant for is based on 1% of the overall private rented properties in the borough. Indicative grant cap figures from Welsh Government are below:

Scheme Year	2023/24	2024/25	2025/26	2026/27
Number of new properties	3	18	32	35
Cumulative Number of properties	3	21	53	88

- 3.13 **Council ownership of accommodation.** Work has been carried out to evaluate this opportunity through a feasibility approach working with the Corporate Landlord department whereby the Council purchases, owns and manages temporary accommodation. In the first instance shared Housing in Multiple Occupation (HMO) style properties have been explored. The aim is to reduce the temporary accommodation costs per unit compared to the alternative of placing service users in hotels.
- 3.14 An opportunity has been identified and the initial intention is to deliver 18 bedroom units from three HMOs. This will reduce the temporary accommodation costs for these units to approximately £25 per day per unit, compared to the alternative of placing service users in other provisions at an average cost of £85 per day per unit. An initial financial model has been based on a purchase price of three HMOs at £350,000. Typical purchase costs range from £250,000 to £350,000. The capital funding for the HMO purchases will be provided via S106 funding, which is already included within the capital programme, and where possible Welsh Government funding, which is currently being explored. Cabinet should be aware that as with all investment opportunities the property market will be subject to fluctuations which will result in either increases or decreases to the resultant capital value. The property will also require management to safeguard the physical condition of the asset. Additionally, in the event that the property needs to be sold to generate capital funds, the disposal process will take a number of months to complete.
- 3.15 Whilst providing suitable units of accommodation this piece of work and potential saving per bedroom is linked to the Medium Term Financial Strategy 2024-25 to 2027-28, which sets out the spending priorities of the Council. The strategy includes a financial forecast for 2024-2028, and included in this is a 10% reduction of the Housing budget for 2024-2025 which equates to £397k.
- 3.16 This report highlights several pieces of work being taken forward to tackle pressures on housing and homelessness. The outcomes of some of these pieces of work are medium to long term and as such there is a need to continue to address the immediate pressures highlighted in section 2 of the report. As per section 2.6 the Council's current arrangements with private accommodation providers are due to expire at the end of March 2024.

- 3.17 As outlined in section 2.2 as of the end of February 2024 there are 495 individuals from 273 households in temporary accommodation. These accommodation placements are statutory duties in line with the Housing (Wales) Act 2014. The Housing Solutions Team continue to be under significant day to day pressure in terms of presentations from those threatened with homelessness.
- 3.18 To allow the continuation of the arrangements with existing accommodation providers, it is proposed that the Council's CPRs be suspended and the Council enter into Service Level Agreements with accommodation providers for 'up to' 12 months, in order to meet presenting need. It is proposed that the agreements with existing accommodation providers be used, to enable consistency in provision for both BCBC and any service users accommodated. By providing this accommodation since the Covid 19 pandemic the accommodation providers have developed experience in providing temporary accommodation and a working relationship with BCBC's Housing Solutions Team, key to the successful management of temporary accommodation placements.
- 3.19 Cabinet needs to be aware that in taking forward this action, the Council is exposed to the risk of potential challenge from other accommodation providers. The Council's CPRs ensure that procurement exercises are lawful and carried out in compliance with Public Procurement Law, in particular the Public Contract Regulations 2015. This report proposes entering into agreements without any competition which breaches the requirements of the Public Contract Regulations 2015 and therefore requires Cabinet's approval to suspend the Council's CPRs.
- 3.20 The risk of challenge is not possible to quantify, however given the need to continue service provision to vulnerable people, the pressures on current homelessness services, and the limited availability of suitable and willing accommodation providers to provide such accommodation, Cabinet may take the view that the potential for challenge is one it is prepared to accept. In addition, due to the specialist nature of provision there are relatively limited numbers of providers of such services.
- 3.21 It is proposed that a further report be brought to Cabinet within 12 months to update on the developing position, with regards to temporary accommodation.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

- 5.1 Tackling homelessness is a Welsh Government priority. The report contributes to the following goals within the Well-being of Future Generations (Wales) Act 2015:
- A prosperous Wales – Reducing homelessness supports a prosperous Wales by reducing cost to the public purse.

- A resilient Wales – Our Housing Support Programme Strategy aims to prevent and relieve homelessness, increasing the resilience of both individuals supported and the general structures in place to support the goal of achieving a position where homelessness in Wales is rare, brief and non recurrent.
- A Wales of cohesive communities – Preventing individuals from becoming homeless will support cohesive communities.
- A globally responsive Wales – Homelessness is an issue across the globe. These strategic documents set out the approach Bridgend will take to support Wales in its efforts around this agenda.

5.2 It is considered that there will be no significant or unacceptable impacts upon the achievement of well-being goals/objectives as a result of this report.

6. Climate Change Implications

6.1 The prevention and relief of homelessness supports the agenda around climate change. A key priority is to increase BCBC's affordable housing supply to meet demand, with the intention of informing affordable housing schemes to meet these needs. Any schemes developed through TACP or SHG will be developed in line with Welsh Government planning and standards requirements, which support moves to tackle climate change.

7. Safeguarding and Corporate Parent Implications

7.1 Homelessness and housing support services play a key role in supporting BCBC's safeguarding agenda, both from an individual perspective with services often supporting vulnerable individuals, known to safeguarding agencies.

7.2 The priorities set out in the Housing Support Programme Strategy reference a need to improve collaboration with key stakeholders, with specific objectives around improving collaboration to implement the national care leavers and accommodation and support framework, a key part of Corporate Parenting implications.

8. Financial Implications

8.1 The estimated cost of the purchase of properties for the purpose of temporary accommodation is highlighted at section 3.14. These costs will be met from S.106 funding which is included in the capital programme, whilst opportunities for Welsh Government funding will also be explored and utilised if possible. A business case in line with BCBC Capital Programme processes was submitted and the processes set out in BCBC's property Acquisition Protocol will also be followed. The purchase of these properties will contribute to the Medium Term Financial Strategy 2024-25 to 2027-28 by significantly reducing the ongoing revenue costs to the Council. The project aims for a 10% reduction of the Housing budget for 2024-2025 which equates to £397k.

8.2 The cost of the established units of accommodation with private providers utilised on a service level agreement basis for temporary accommodation ranges from £40 per night to £150 per night. The cost of each unit is dependent on the nature of the property, for example a 4 bed property will likely cost more than a 2 bed property. It is estimated that the total cost for a 6 month period will be around £1.7m. This is an estimate at this time as final costs will be negotiated during discussions with

accommodation providers, but the service will seek to keep any increase to a minimum. Cabinet should note ad hoc arrangements may still be required in addition, to meet emergency scenarios, which cannot be predicted.

- 8.3 Whilst, as outlined in section 2.8 Welsh Government funding has been received in recent years to support this agenda a 'No One Left Out' grant award has not yet been received for 2024/25. An award is expected, but the level of award is not yet known. Any grant funding received will be used towards these costs, with any remaining balance being met from the BCBC core budget, as approved by Council as part of the budget setting process in February 2024 to continue the commitment to focus support for homelessness individuals providing them with accommodation.

9. Recommendations

9.1 It is recommended that Cabinet:

- Note the contents of this report;
- Approves the acquisition of Housing in Multiple Occupation (HMO) style properties which are within the Council's approved capital estimates for the purpose of providing temporary accommodation subject to all reasonable due diligence and legal advice;
- Agrees to suspend the relevant parts of the Council's Contract Procedure Rules (CPRs) with regards to the requirement to tender for a contract and delegate authority to the Head of Partnerships and Housing to enter into Service Level Agreements with existing accommodation providers for a period of 'up to' 12 months in order to continue the provision of additional temporary accommodation as necessary to meet the Council's statutory duties;
- Delegate authority to the Head of Partnerships and Housing to approve the final terms of the Service Level Agreements on behalf of the Council and to arrange execution of the agreements on behalf of the Council in consultation with the Chief Officer – Legal and Regulatory, HR and Corporate Policy;
- Note that a further report will be presented to Cabinet to update on the position regarding temporary accommodation.

Background documents

None

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	LOCAL HOUSING MARKET ASSESSMENT 2024
Report Owner / Corporate Director:	CHIEF OFFICER – FINANCE, HOUSING AND CHANGE
Responsible Officer:	ADAM PROVOOST PRINCIPAL STRATEGIC PLANNING POLICY OFFICER
Policy Framework and Procedure Rules:	There is no impact on the policy framework or procedure rules.
Executive Summary:	This report seeks approval to adopt and submit the 2024 Local Housing Market Assessment to Welsh Government, which has been undertaken in accordance with the latest national guidance. This document will replace the 2021 Assessment and provides evidence to develop long-term views of housing need in order to inform strategic housing priorities. Submission will fulfill the Council's statutory requirements.

1. Purpose of Report

- 1.1 The purpose of this report is to seek Cabinet approval of the statutory Local Housing Market Assessment (LHMA) 2024 for submission to Welsh Government.

2. Background

- 2.1 Section 8 of the Housing Act 1985 (as amended) places a statutory duty on local authorities to periodically assess the level of housing need in their area. Production of an LHMA falls under this duty, building upon the requirement to review housing needs through a more holistic review of the whole housing market.
- 2.2 A new methodology for the technical calculation of housing need across Wales became operational on 31st March 2022. Welsh Government clarified that this new LHMA tool and guidance is now to be used as the only basis of evidence for the calculation of housing need in Wales. Local authorities are required to rewrite LHMA's every five years and refresh that LHMA once during that five-year period under section 87 of the Local Government Act 2003.
- 2.3 This report has been prepared to fulfil Bridgend County Borough Council's statutory requirements and replace the 2021 LHMA that was based on previous Welsh Government guidance. The refreshed 2024 LHMA will enable a comprehensive

understanding of the local housing markets across the county borough and provide robust evidence to inform strategic housing and planning services.

3. Current situation/ proposal

- 3.1 The 2024 LHMA (attached as **Appendix 1**) has analysed household projections alongside key socio-economic, demographic and property market data in order to calculate housing need estimates for Bridgend County Borough. This process has provided detailed insights into the mechanics of the local housing markets to identify how housing need translates into different sizes, types and tenures of housing.
- 3.2 Gross market housing estimates account for just under half of the overall gross housing need estimate (with private rent accounting for 25% of total gross need and owner occupation accounting for 21%). Market housing need is ultimately highest within Bridgend and significant within the other main settlements of Porthcawl, Pencoed, the Llynfi Valley and Pyle, Kenfig and Cornelly. There is also a need to diversify the dwelling stock, enhance housing options and enable alternative forms of smaller-scale development in the Ogmore and Garw Valleys. Options such as co-operative housing, self-build and custom build opportunities can be explored to enable growth where conventional development economics prove more challenging.
- 3.3 Over the 15 year LHMA period, there is a total estimated net need for 2,834 affordable housing homes, comprising 1,548 social rented homes and 1,286 intermediate homes. However, it is important to emphasise that this identified need should not be considered a delivery target or even the solution to the affordability issues within the county borough. It instead indicates the scale of housing need, to be addressed through a range of market interventions as far as practically possible. These include, yet are not limited to, Social Housing Grant (SHG), alternative capital/revenue grants, planning contributions, Registered Social Landlord (RSL) funded schemes, reconfiguration of existing stock, social lettings agencies, private sector leasing schemes and re-utilisation of empty homes.
- 3.4 The net affordable housing need estimates are to be used as a broad spatial guide to strategically increase the supply of affordable housing within the county borough, although identification of suitable sites must accord with sustainable placemaking principles. The greatest need for affordable accommodation (social rent and intermediate) is in the south of the county borough. This is where property prices are the highest, affordability issues are most acute and levels of existing affordable housing are lowest relative to those in need. The housing markets of Bridgend, Porthcawl, Pencoed and Pyle, Kenfig and Cornelly all demonstrate significantly high net need for affordable housing. The Llynfi Valley is also a high need area, reflecting the fact that Maesteg is the second largest town in the county borough. While the need for additional social housing is lower in scale within the Ogmore and Garw Valleys, there is still a clear need to diversify the types of affordable accommodation available.

3.5 The majority of net social rented need identified is for one bedroom accommodation, yet there is still a persistent, albeit smaller scale need, for larger family homes in most areas. Dwelling mixes weighted towards one bedroom homes with a suitable mix of larger properties will help meet this need while facilitating opportunities for sustainable household progression. Two and three bedroom intermediate homes are also key to maintain choice in the market and ensure entry level affordable properties are available for newly forming households to move into.

3.6 Overall, the 2024 LHMA provides evidence to develop long-term views of housing need and demand to inform local to regional strategies. Operationally, it provides a tool to justify affordable housing provision on planning applications, support the local authority SHG Prospectus and inform strategic housing priorities.

4. Equality implications (including Socio-economic Duty and Welsh Language)

4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

5.1 The 2024 LHMA will provide robust evidence to enhance the supply of affordable housing. This is a key contributory factor to delivering Local Wellbeing Objective 7 'A County Borough where we support people to live healthy and happy lives'.

5.2 The report will also provide evidence to enhance strategic direction and contribute to the following goals within the Well-being of Future Generations (Wales) Act 2015:

- A prosperous Wales – Enabling households to meet their accommodation needs and reducing homelessness supports a prosperous Wales by supporting people to become financially stable and reducing cost to the public purse.
- A resilient Wales – provision of good quality market and affordable housing will increase the resilience of both individuals and communities.
- A Wales of cohesive communities – enabling well-connected, multi-tenure developments will foster sustainable, socially cohesive communities.

6. Climate Change Implications

6.1 There are no direct Climate Change implications from this report, although it will provide evidence to reduce the impact of housing on climate change and the

environment through provision of good quality market and affordable homes, grounded in sustainable placemaking principles.

7. Safeguarding and Corporate Parent Implications

7.1 There are no Safeguarding and Corporate Parent implications from this report.

8. Financial Implications

8.1 There are no financial implications arising from this report.

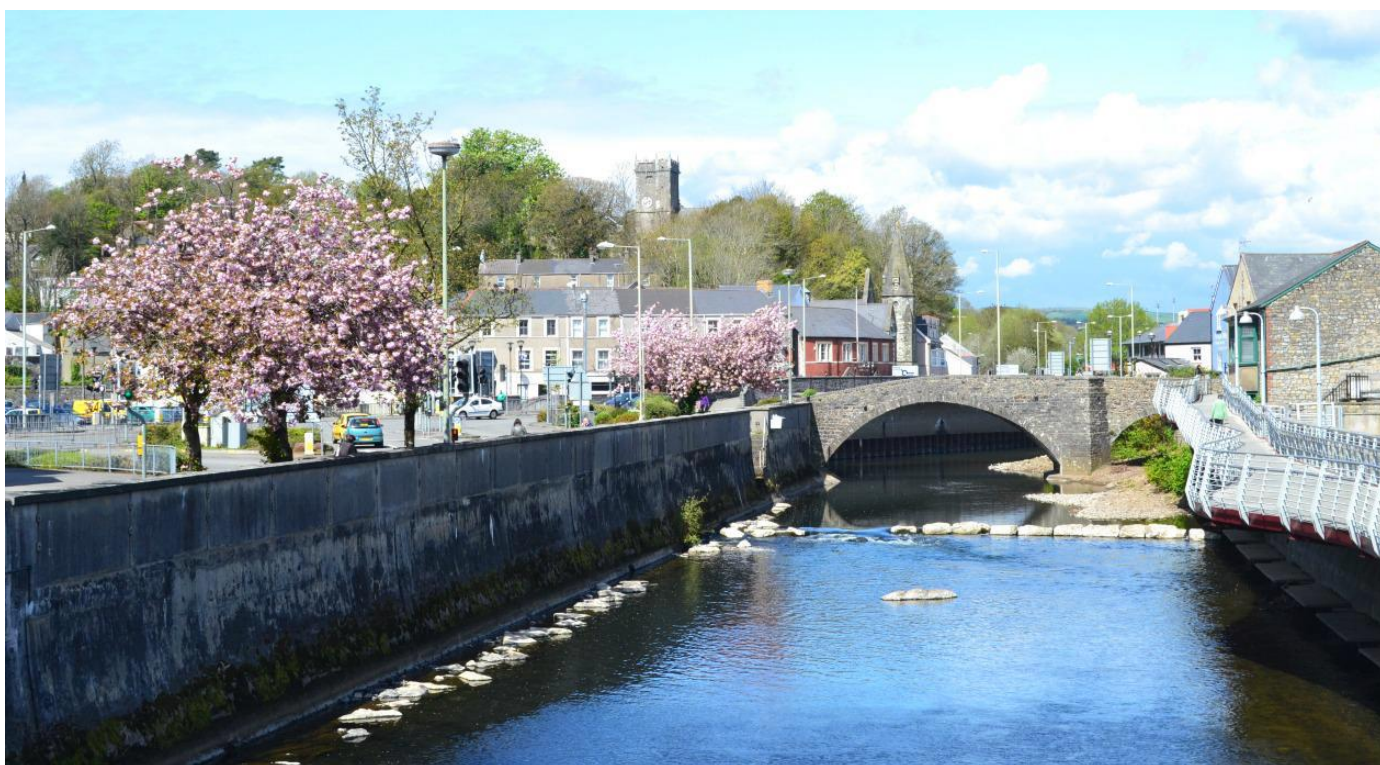
9. Recommendation

9.1 It is recommended that Cabinet approve the LHMA 2024 (Appendix 1) for submission to Welsh Government.

Background documents

None.

Local Housing Market Assessment 2024



Preface

A new methodology for the technical calculation of housing need across Wales became operational on 31st March 2022. Welsh Government published a new Local Housing Market Assessment (LHMA) tool and accompanying guidance, clarifying that it is now to be used as the only basis of evidence for the calculation of housing need in Wales. Henceforth, local authorities are required to **rewrite** their LHMA every five years and **refresh** their LHMA once during that five-year period (between years two and three) using this new tool and guidance.

This report has been prepared to fulfil Bridgend County Borough Council's requirements and update the previous LHMA (2021) that was completed in accordance with previous Welsh Government guidance. This report represents a full five-yearly rewrite of the LHMA and includes an overview of the methodology, key data inputs and justified assumptions used to calculate housing need. A range of additional housing need estimates have also been produced using different Welsh Government household projections, recognising that each estimate is sensitive to the assumptions used. However, none of these estimates translate directly into a delivery target or represent the solution to the affordability issues within the county borough. They instead indicate a sliding scale of housing need across the locality and provide part of the evidence base to inform delivery targets.

Quality Assurance Statement

This LHMA has been prepared in partnership between the Local Planning Authority and Local Housing Authority following engagement with key stakeholders. The primary author has significant experience in preparing such assessments, developed previous national LHMA guidance/training and was a member of the technical working group that advised Welsh Government on the development of the latest LHMA Guidance and Tool.

This LHMA has been prepared in strict accordance with the latest (2022) Welsh Government Guidance. All data sources, geographical boundaries and assumptions have been clearly defined, explained and justified. The following steps have been taken to ensure production of a robust LHMA:

- Housing Market Areas (HMAs) have been defined using statistical geographies in accordance with Welsh Government Guidance and were informed by a Viability Stakeholder Group.
- The latest 2021 Census datasets have been analysed at Middle Super Output Area level to ensure geographical consistency with the defined HMAs.
- The latest suite of Welsh Government household projections together with the Replacement Local Development Plan (RLDP) projection have been utilised to provide upper and lower estimates of housing need.
- Any deviations from default assumptions in the LHMA Tool have been clearly explained and justified.
- Median average prices have been utilised wherever possible to avoid atypical values (at the extremities) unduly affecting averages.
- Common Housing Register data has been scrutinised and cleansed to ensure households have not been over, under or double counted.
- Data derived from samples have been based on sufficient numbers of records to ensure robustness and/or cross referenced with secondary data to ensure appropriateness.
- Outputs have been checked to ensure they are arithmetically correct.
- Outputted figures have been rounded to the nearest whole number, consistently. In some instances, statistical rounding has led to totals in tables not summing correctly. All affected tables have been caveated appropriately. This is common when calculating housing need and presenting statistical tables, although it does not undermine the robustness of the LHMA.
- All figures and tables have been labelled in full and consistently.

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Appendix 1: Output Summary Tables from LHMA Tool

1. Introduction

1.1 National Policy Background

- 1.1.1 Section 8 of the Housing Act 1985 (as amended) places a statutory duty on local authorities to periodically assess the level of housing need in their area. It is vital that authorities have a comprehensive understanding of their local housing market(s) and provide a robust evidence base for effective strategic housing and planning services. Production of an LHMA falls under this duty, building upon the requirement to review housing needs through a more holistic review of the whole housing market. Welsh Government expect local authorities to rewrite LHMA's every five years and refresh that LHMA once during that five-year period (between years two and three) under section 87 of the Local Government Act 2003 (as substituted by the Deregulation Act 2015).
- 1.1.2 The importance of LHMA's was underlined in the 2019 Independent Review of Affordable Housing Supply, which concluded "the basis of good housing policy and decisions regarding affordable housing supply stems from the best possible data on housing need and demand". The Review placed significant emphasis on understanding exactly how many homes are needed, in which geographical areas and in what tenures. A robust LHMA is the key means of identifying this evidence at the local level.
- 1.1.3 Planning Policy Wales highlights that LHMA's are to "form a fundamental part of the evidence base for development plans", that should be considered holistically with a range of other evidence "in order to identify an appropriate strategy for the delivery of housing in the plan area" (WG, 2023, para. 4.2.6). The importance of understanding need for different types of affordable housing in relation to supply is also highlighted, with the LHMA being deemed critical to inform the appropriate mix of dwellings for new developments and "to support policies and decisions on planning applications" (WG, 2023, para. 4.2.7).
- 1.1.4 In addition, local authorities must carry out a homelessness review and develop a homelessness strategy every four years under sections 50, 51 and 52 of the Housing (Wales) Act 2014. The LHMA plays a fundamental role in informing this strategy which must include a review of the resources available to the local authority and other bodies associated with supporting people who are or may become homeless.
- 1.1.5 It is also essential for local authorities to consider their equality duties under the Equality Act 2010 (as amended by The Equality Act 2010 (Amendment) Regulations 2023) and the Welsh Public Sector Equality Duties.

1.2 Local Policy Background

Delivering Together: Our Corporate Plan 2023-28

1.2.1 The Corporate Plan for Bridgend County Borough sets out the Council's priorities and details how the Council we will work alongside local people and partners to provide services over the next five years. The Plan is framed around 7 Wellbeing Objectives, which aim to enable a County Borough...

1. where we protect our most vulnerable
2. with fair work, skilled, high-quality jobs and thriving towns
3. with thriving valleys communities
4. where we help people meet their potential
5. that is responding to the climate and nature emergency
6. where people feel valued, heard and part of their community
7. where we support people to live healthy and happy lives

1.2.2 A well evidenced and up to date LHMA provides robust evidence to inform delivery of many of these Objectives, by providing a better understanding of the components of the housing market and pinpointing key gaps where intervention may be required. Specifically, improving the supply of affordable housing is a key derivative of Wellbeing Objective 7, informed by the findings of the LHMA and delivered in partnership with Welsh Government, the private sector and Registered Social Landlords (RSLs).

RLDP 2018-2033

1.2.3 The RLDP is centred on a Vision that seeks continued development of a safe, healthy and inclusive network of communities that connect more widely with the region to catalyse sustainable economic growth. The 2021 LHMA formed a key part of the RLDP's evidence base to deliver against this Vision and derived aims and objectives. The scale and spatial distribution of housing need identified by the LHMA were key considerations in determining the overall level and location of housing in the RLDP. The Plan's contribution to affordable housing provision was also carefully analysed by considering the need identified in the LHMA alongside robust viability testing to ensure formulation of viable affordable housing policy thresholds and proportions. The overall affordable housing target specified within the RLDP has been determined by taking these inter-related components of evidence into account. This has informed development of a robust housing trajectory to illustrate the rate of housing delivery for both market and affordable housing over the plan period.

- 1.2.4 The 2024 LHMA will provide refreshed evidence to inform the appropriate mix of dwellings for new developments, particularly the types of affordable housing (i.e. intermediate and social rented) in short supply, thereby identifying how planning contributions will help meet the RLDP's affordable housing target. Other sources of affordable housing delivery will also prove key to addressing housing need identified in the LHMA. Indeed, it must be recognised that the need identified in the LHMA represents the scale of the affordability gap in the market and the RLDP itself is not the only affordable housing delivery mechanism to help address it. Complementary sources of supply include, although are not limited to, Social Housing Grant (SHG) and other capital/revenue grant funded schemes, RSL self-funded schemes, reconfiguration of existing stock, private sector leasing schemes, discharge of homelessness duties into the private rented sector and re-utilisation of empty properties. The 2024 LHMA will play a key role in informing and enabling delivery of affordable housing through all potential sources of supply.

Housing Support Programme Strategy and Action Plan 2022-26

- 1.2.5 The Housing Support Programme Strategy replaces the 'Strategy to Tackle Homelessness in Bridgend County Borough 2018-2022' and sets out strategic direction for delivering homelessness and housing related support services for 2022-2026. It includes the strategic requirements in Welsh Government's Housing Support Grant Guidance and the statutory requirements for a Homelessness Strategy set out in Part 2 of the Housing (Wales) Act 2014. This four year strategy (which will have a mid-point review, after 2 years) identifies key priorities for Bridgend County Borough Council and its partners, in the delivery of homelessness prevention and other housing related support services. It supports a transitional shift to a rapid rehousing plan to achieve settled, mainstream housing outcomes as quickly as possible. The Strategy recognises that homelessness presentations are increasing due to a number of factors. These not only include changes to people's income, the availability of affordable housing and the welfare benefits system, but also presentations from people with increasingly complex needs, including mental ill-health, substance misuse, and poverty of finance and opportunity.
- 1.2.6 The Council is determined to overcome these challenges. The Strategy is centred on a Vision *"To work in partnership with stakeholders to prevent homelessness, ensuring that where prevention is not possible, homelessness is rare, brief, and unrepeatable. Those who access services will be given the support required to live as independently as possible."* In collaboration with local third sector organisations, the Council has utilised the Housing Support Grant (HSG) to commission key projects for people in need. This includes additional units of temporary accommodation, increased use of the Housing First/Rapid Rehousing Pathway and improved options for people who require housing related support.

Furthermore, the Council established supported lodgings for young people, direct access floor space as a year-round emergency accommodation option for street homeless people, a rapid supported accommodation service for care leavers and floating support projects.

- 1.2.7 The LHMA will further support delivery of the Strategy by developing the evidence base and identifying the scale of housing need across different HMAs. This evidence will help shape the provision of new-build accommodation and maximise the amount of SHG, supplementary grants and s106 contributions the Council is able to attract to tackle homelessness in partnership with RSLs and Welsh Government.

1.3 Governance and Consultation

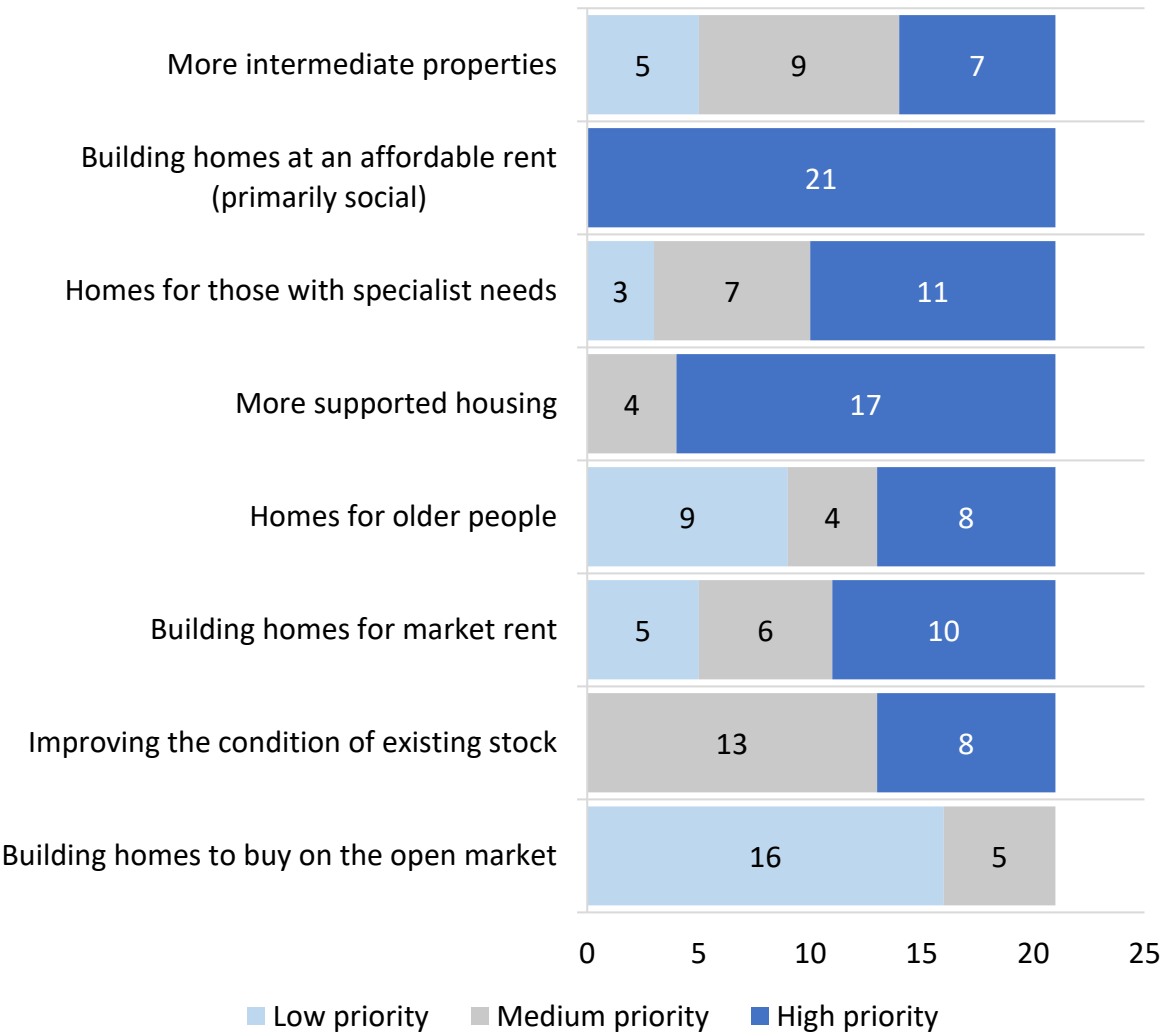
- 1.3.1 Production of this LHMA has been undertaken through a collaborative approach with stakeholders. This is considered critical to develop a better understanding of all stakeholder pressures and priorities. An active and valued network of professionals (across social care, health, housing, and community groups) work cohesively to deliver housing and related services throughout the county borough. Smarter data collection and analysis across this network is key means of informing robust strategic planning, while enabling effective partnership working.
- 1.3.2 Regular collaborative meetings habitually take place to discuss housing related issues across the county borough (as considered and identified within the LHMA). These include the Housing Support Provider Forum, the Community Safety Partnership, Multi-Agency Public Protection Arrangements (MAPPA), Multi Agency Risk Assessment Conference (MARAC), the Homelessness Forum, the Regional Collaborative Group and other multi-agency meetings involving social care, education, private landlords, RSLs and Cwm Taf Morgannwg University Health Board (CTMUHB). The Local Housing Authority continuously develops relationships with these key groups and has used this network throughout the LHMA process. Specifically, data on housing stock, empty homes, rents, social lettings trends, committed supply and common housing register trends were sourced through these networks to inform the LHMA. This is considered vital to create a shared understanding of the barriers to good housing and to identify collaborative opportunities for improving access to local services and support, providing better outcomes, and enabling people to take greater control over their lives.

Housing Partner Stakeholder Questionnaire

- 1.3.3 In order to supplement these collaborative meetings for this LHMA, a questionnaire was distributed to a range of key stakeholders that have a good

understanding of the local housing market. These included local authority development officers, RSLs, lettings and estate agents, Shelter Cymru, housing managers, support providers, social care, refugee and resettlement managers. Additional feedback was gathered by asking respondents to rank each housing related priority as ‘low’, ‘medium’ or ‘high’. A total of 21 replies were received as illustrated within Figure 1.

Figure 1: Stakeholder Ranking of Priorities



Data Source: Council Stakeholder Survey, 2023

1.3.4 Building homes at rent considered usefully affordable was ranked as the highest priority by stakeholders, with all respondents considering this a high priority. Social housing was the main type, although the role of the private rented sector was also duly acknowledged. This was deemed a priority to reduce homelessness and the time spent in temporary accommodation, relieve overcrowding, help reduce poverty amongst households living in the private

rented sector and to deliver appropriate housing for older people who currently live in unsuitable housing.

- 1.3.5 Intermediate housing was also ranked as important, with 76% of respondents placing this as a medium or high priority. This was mainly because of the need for lower deposits and lower monthly payments than available on the open market, coupled with the need for long-term security. Indeed, many respondents cited issues first time buyers face in saving for a deposit, dealing with high interest rates and low wage inflation, which renders home ownership an unaffordable option for many. Those who regarded some forms of intermediate accommodation (i.e. shared ownership) as a low priority noted the additional service charges and restrictions that may apply if the property is leasehold.
- 1.3.6 Improving the quality of existing stock was also deemed a priority, with all respondents ranking it medium or high. Feedback suggested that all households should have a decent, safe, and secure home.
- 1.3.7 Stakeholders highlighted a range of other priorities, including need for more supported and specialist housing, a lack of adapted properties and few larger properties. A shortage of affordable housing was a common theme, with stakeholders reporting that the recent ascent in rents and property prices, spiralling household costs and low wage inflation has acutely impacted the lowest income households, notably vulnerable families and individuals. This range of factors has resulted in households remaining in temporary accommodation for longer, which in turn, increases costs for the local authority.

Development and Viability Stakeholder Groups

- 1.3.8 Annual Housing Trajectory Stakeholder Group meetings have also been held to forecast the overall total and spatial distribution of housing provision due to be delivered across Bridgend County Borough over the RLDP period. The Group was initially formed in 2021 and includes an appropriate cross section of stakeholders, including volume and regional housebuilders, RSLs, planning agents, land agents, utility providers and CTMUHB. This Group informed the development of the RLDP's Housing Trajectory through site-specific phasing analysis of all sites with a planning permission or an allocation in the plan. Effective engagement and collaboration with this group equally informed the committed supply data used within the LHMA, providing certainty that the data and anticipated annual delivery rates have been subject to independent scrutiny and verification.
- 1.3.9 A Viability Stakeholder Group was also formed prior to Preferred Strategy Stage of the RLDP. This Group contained a similar range of stakeholders to the

Housing Trajectory Stakeholder Group, although was specifically formed to consider broad viability across the county borough's housing markets. This group identified the most appropriate local geographies to test broad development viability scenarios; ultimately determining that the HMAs outlined in Section 2 were most appropriate for this purpose. The group also specifically recommended adopting a consistent set of HMAs for development viability testing and LHMA purposes for consistency, which has intrinsically shaped this LHMA.

2. Overview of Assessment and Methodology

2.1 Methodology, inputs and assumptions

- 2.1.1 The additional housing needs estimates are determined using the Welsh Government LHMA Tool. This Tool uses a formulaic approach to allocate the additional housing need, formed from the existing unmet need and the newly arising need (change in the household projections over the LHMA period), to the different housing tenures. All existing unmet need is allocated to affordable housing and assumed to be covered during the first five years of the LHMA period. The newly arising need is allocated between market and affordable housing.
- 2.1.2 The LHMA Tool uses default data inputs for private rents (Rent Officers Wales), house prices (Land Registry Price Paid) and Welsh Government household projections (used to generate the newly arising need) by HMA. These default inputs have been bolstered by adding CACI Paycheck data (to provide household income percentile distributions), the RLDP household projection (to ensure consistency with the RLDP evidence base) existing unmet need (from the Common Housing Register), planned committed supply (from planning consents plus grant funded schemes expected to come forward) and turnover of existing stock (by taking an average of social lettings over a three-year period). The latter two data inputs are considered over the first five years of the LHMA period only and are fully allocated to affordable housing. This is because supply becomes less accurate to predict beyond the first five years of the LHMA period.
- 2.1.3 Several key assumptions are then applied to the data inputted in accordance with Welsh Government Guidance. This generates an income level above which households are deemed able to meet their needs in the market and a lower income level below which households are deemed to need social rented accommodation. An allowance is also made for households in need of intermediate tenures, which are those households not allocated to market housing or social rented accommodation (commonly referred to as 'the squeezed middle'). The LHMA Tool also forecasts how the data inputs may change over the first five years of the LHMA period.
- 2.1.4 The output tables from the LHMA Tool provide a range of LHMA additional housing need estimates. They are used to inform local housing requirements and form a key part of the evidence base for Development Plans, enable implementation of RLDP policies, inform local housing strategies and support the local authority SHG Prospectus. However, it is important to emphasise that this identified need should not be considered a delivery target or even the solution to the affordability issues within the locality. It instead indicates the scale of housing

need within Bridgend County Borough, which the Council will seek to address through a range of market interventions. Moreover, this headline level of housing need also distorts differences in the numerous HMAs across Bridgend County Borough. There is undoubtedly a mismatch between the locations and types of many existing affordable units and the geographically laden housing needs of local households requiring housing assistance.

2.2 HMAs

- 2.2.1 The settlement structure of the county borough still broadly reflects its agricultural and industrial heritage. Bridgend is the pivotal town, linking up with the three Valleys, the former port of Porthcawl and the growth areas around the Valleys Gateway, Pyle and Pencoed. These historically distinct areas effectively form the county borough's broad housing markets today. For the purposes of this assessment, the county borough has therefore been divided into eight HMAs. These areas have been aggregated geographically based on the functional areas where people currently live and would be willing to move home, recognising that housing markets are not constrained by administrative boundaries. They are defined (statistically) by clusters of Middle Super Output Areas (MSOAs), which are summarised in Table 1 and Map 1 overleaf for reference.
- 2.2.2 A number of key factors have been considered when defining these areas, including the broad price of housing (to consider 'transferability' within the market) and major transport links by road or rail (to take account of commuting patterns). Individual preferences of households may well centre on smaller geographical radii. However, planning for additional housing provision needs to be conducted at a scale suitable to consider the costs and benefits of increasing supply (i.e. land availability, broad viability, dwelling vacancy rates and potential impact on housing need deficits). This LHMA assesses the various components of the housing market across each of these varied HMAs. This represents a necessary degree of consistency and continuity with the previous LHMA (2021), which utilised the same HMAs.

Table 1: HMAs, Bridgend County Borough

Areas Included	MSOA(s)
A) Bridgend and Surrounding (Brackla, Bryntirion, Laleston and Merthyr Mawr, Cefn Glas, Coity, Coychurch Lower, Litchard, Llangweydd and Brynhyfryd, Morfa, Newcastle, Oldcastle, Pendre and Pen-Y-Fai)	W02000228 W02000229 W02000230 W02000231 W02000232 W02000233 W02000234
B) Garw Valley (Bettws, Blaengarw, Llangeinor and Pontycymmer)	W02000221
C) Llynfi Valley (Caerau, Llangynwyd, Maesteg East and Maesteg West)	W02000218 W02000219 W02000222
D) Ogmore Valley (Blackmill, Nant-Y-Moel and Ogmore Vale)	W02000220
E) Pencoed and Heol Y Cyw (Felindre, Hendre and Penprysg)	W02000226
F) Porthcawl (Newton, Nottage, Porthcawl East Central, Porthcawl West Central and Rest Bay)	W02000235 W02000236
G) Pyle, Kenfig and Cornelly (Cefn Cribwr, Cornelly and Pyle)	W02000225 W02000227
H) Valleys Gateway (Aberkenfig, Bryncethin, Bryncoch, Sarn and Ynysawdre)	W02000223 W02000224

Map 1: HMA Boundaries



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3. Overview of Housing Market and Socio-economic and Demographic Trends

3.1 Housing Market Analysis by Tenure

Geographical Size

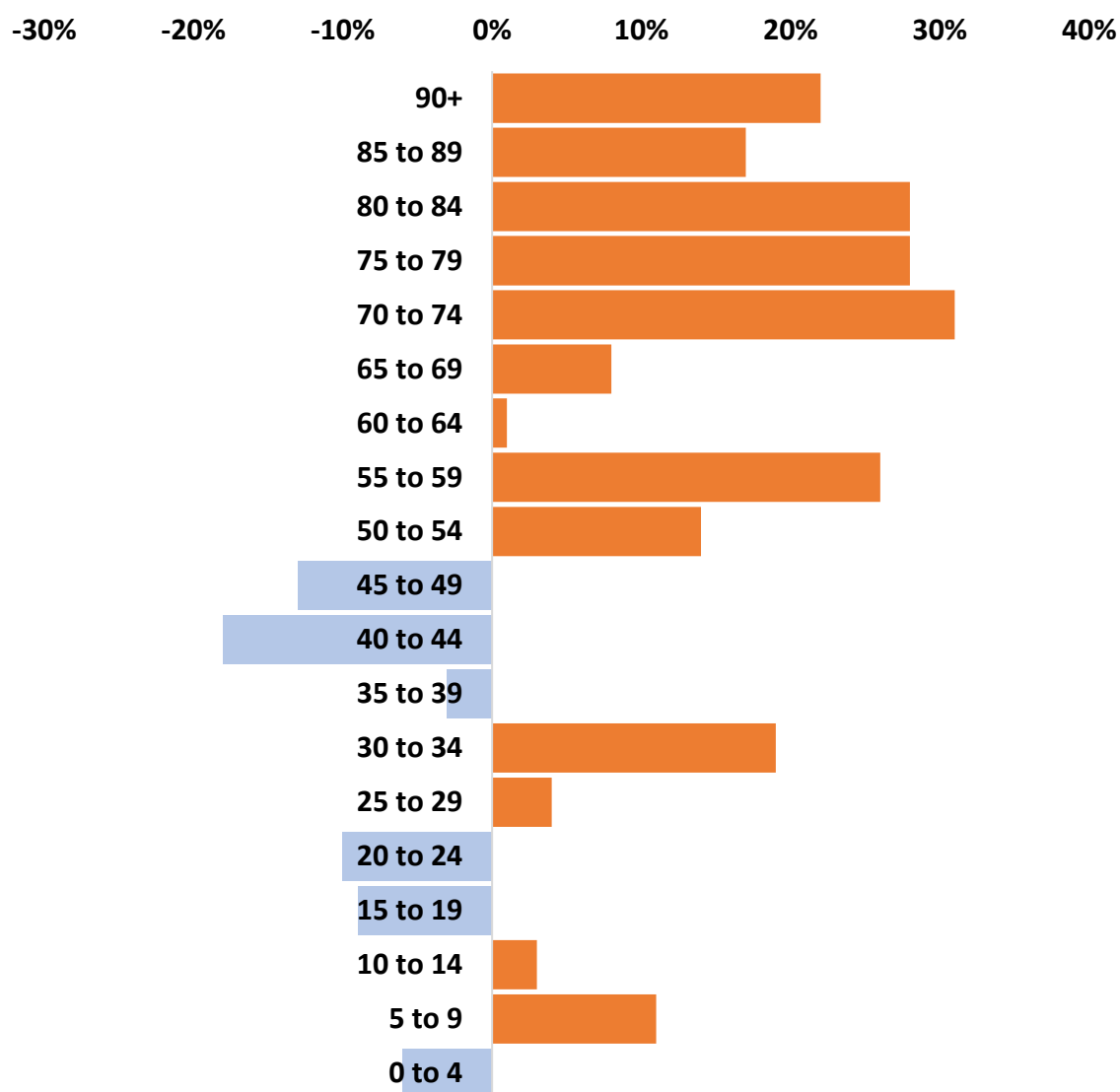
- 3.1.1 Bridgend County Borough lies at the geographical heart of South Wales, equidistant between Cardiff and Swansea and covering an area of approximately 25,500 hectares. It is directly bordered by Neath Port Talbot County Borough to the west and north, Rhondda Cynon Taf County Borough to the north and north east, and the Vale of Glamorgan to the east. Bridgend owes its origins to its strategic location at the lowest bridging point on the River Ogmore, which led to its initial establishment as a market town that expanded when the coal mining industry flourished to the north. The local road and rail network was developed to provide access to communities from the rest of South Wales, taking advantage of the county borough's strategic location. Bridgend County Borough is in a unique position as the gateway to both the Swansea Bay Region and the Cardiff Capital Region. The pivotal position of Bridgend County Borough will prove key in driving forward collaborative, inter-regional strategic planning through the co-ordination of housing, economic growth and connectivity infrastructure.

Population - Age

- 3.1.2 The 2021 Census for England and Wales estimated that Bridgend County Borough's population size increased by 4.5%, from around 139,200 in 2011 to 145,500 in 2021. In relative terms, Bridgend's population growth was the third highest in Wales after Newport (9.5%) and Cardiff (4.7%), also exceeding the Welsh average as a whole (1.4%). In 2021, Bridgend ranked eighth for total population out of 22 local authority areas in Wales, moving up one place in a decade.
- 3.1.3 The age groups driving this population change are also important to consider. There has been an increase of 21.5% in people aged 65 years and over, an increase of 0.5% in people aged 15 to 64 years, and an increase of 2.6% in children aged under 15 years. Figure 2a provides further detail in this respect by depicting the change graphically across five-year age bands.
- 3.1.4 The growth in the 65+ age bands is highly apparent within Figure 2a. In fact, Bridgend was one of only eight local authority areas where the total number of people aged 65 years and over increased by 20% or more between 2011 and 2021. This compares with a 17.7% increase across Wales as a whole. Figure 2a also shows a large change (+26%) in people moving into the 55-59 age group,

who will in turn likely progress to retirement age during this LHMA period (i.e. by 2038/39).

Figure 2a: Population Change (%) by Age Group in Bridgend, 2011 to 2021



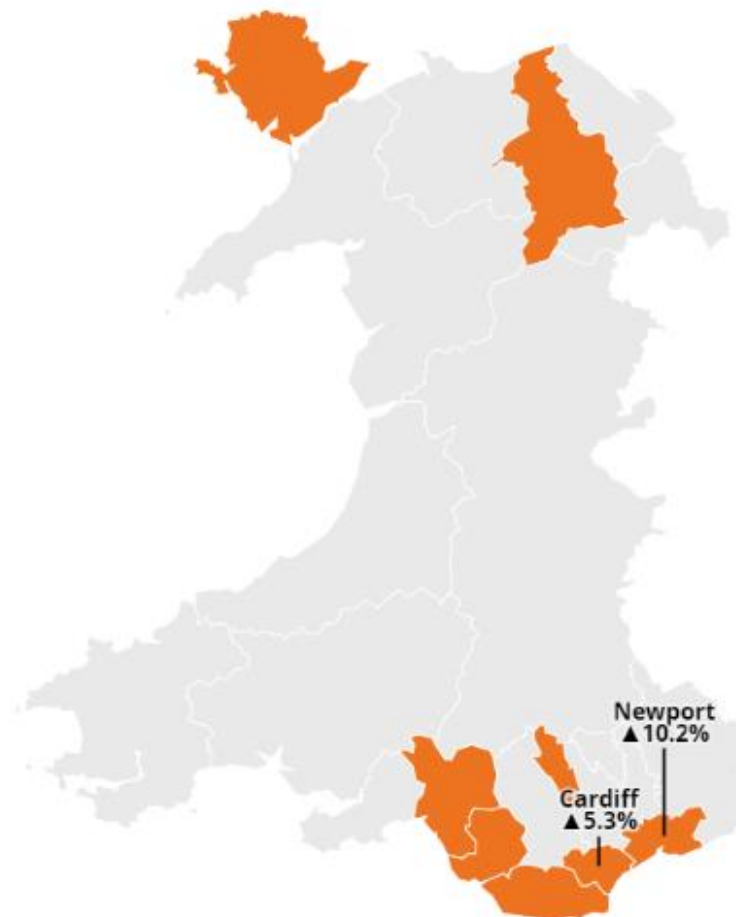
Data Source: Office for National Statistics – Census 2021

- 3.1.5 Figure 2a also shows a negative change in age groups 15 to 19 (-9%) and 20 to 24 (-10%), which can primarily be attributed to school leavers moving onto higher education elsewhere. More notable is the negative change in age groups 35 to 39 (-3%), 40 to 44 (-18%) and 45 to 49 (-13%) as this indicates a net number of established, working age households left the county borough between 2011 and 2021. There were 30,225 people aged 35 to 49 in the county borough in 2011 compared to an estimated 26,800 in 2021. The RLDP's evidence base already identified this latter trend and the growth strategy seeks to reverse this by

attracting and retaining established, economically active households within the county borough.

- 3.1.6 Indeed, Bridgend County Borough is one of only eight local authority areas in Wales that saw an increase in those aged under 15 years between Census counts (illustrated in Figure 2b). The population aged under 15 years increased most in Newport, rising by 10.2%, compared with an increase of 5.3% in Cardiff. Bridgend's growth in those aged under 15 was equally notable at 2.6%. In absolute terms, this means 16.7% of Bridgend County Borough's population was under 15 at the time of the 2021 Census (24,300 people). The RLDP's Growth Strategy therefore seeks to maintain this youthful population in future years of the Plan as a catalyst for economic growth and prosperity.

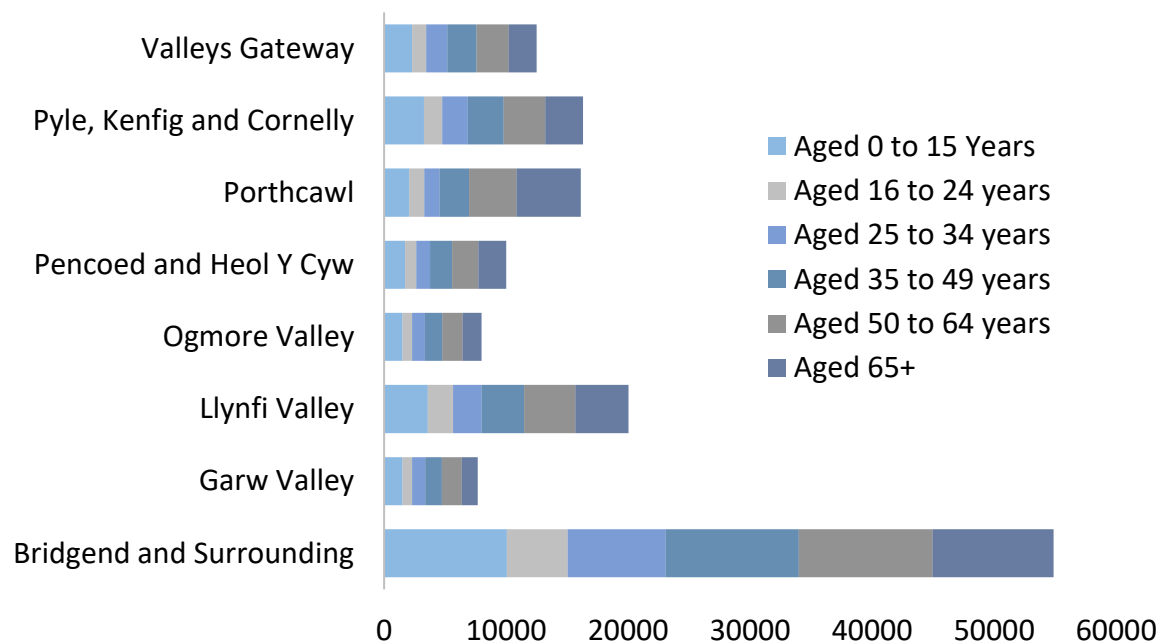
Figure 2b: Local Authorities That Have Seen an Increase in Those Aged Under 15 Years, 2011 to 2021



Source: Office for National Statistics – Census 2021

3.1.7 It is also fundamental to understand how population varies by HMA. Figures 3 and 4 provide a visual overview of the usual resident age profile in both absolute and relative terms, respectively. The settlement structure of the county borough still broadly reflects its agricultural and industrial heritage. Over a third of the total population therefore resides within the Bridgend and Surrounding HMA. The other most significantly populated HMAs are the Llynfi Valley (14% of the total population), Porthcawl (11%), Pyle, Kenfig and Cornelly (11%), the Valleys Gateway (9%) and Pencoed and Heol-y-Cyw (7%).

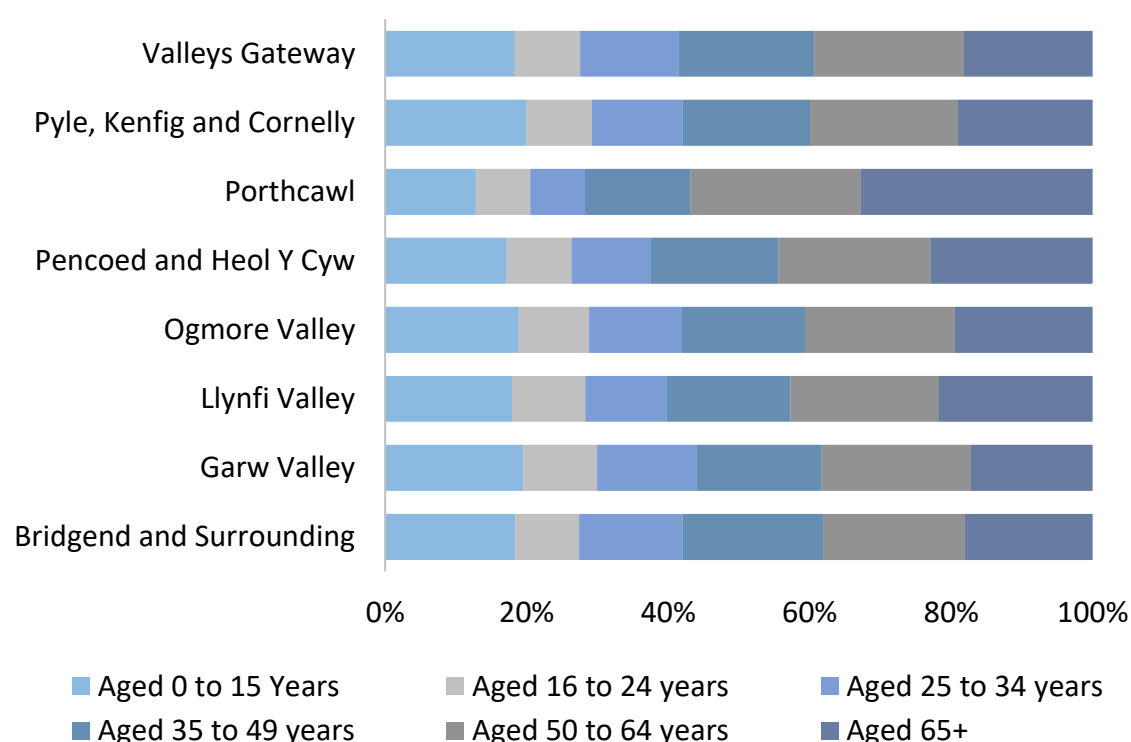
Figure 3: Age of Usual Residents by HMA (Total)



Data Source: 2021 Census

3.1.8 The overall estimated county borough age structure comprises 18% aged 0-15, 61% aged 16-64 and 21% aged 65 plus, which is broadly in line with the average structure for Wales as a whole. However, specific HMAs across the county borough differ from this average. Porthcawl in particular has a significant proportion of residents aged 65+ (33%) and, equally, a notably low proportion of residents aged 0-15 (13%) and 16-24 (8%). This age structure will have long-term socio-economic implications for the HMA without future demographic change, hence why the RLDP seeks to apportion residential-led growth to the settlement to positively counter-balance the locally ageing population. The other HMAs have a more evenly balanced age distribution, albeit there is still need to maintain and enhance the younger working age demographic to ensure future economic prosperity. Indeed, 50+ is the most common age demographic across all HMAs, ranging from 38% of residents in the Bridgend and Surrounding HMA to 57% of residents in Porthcawl.

Figure 4: Age of Usual Residents by HMA (Percentage)



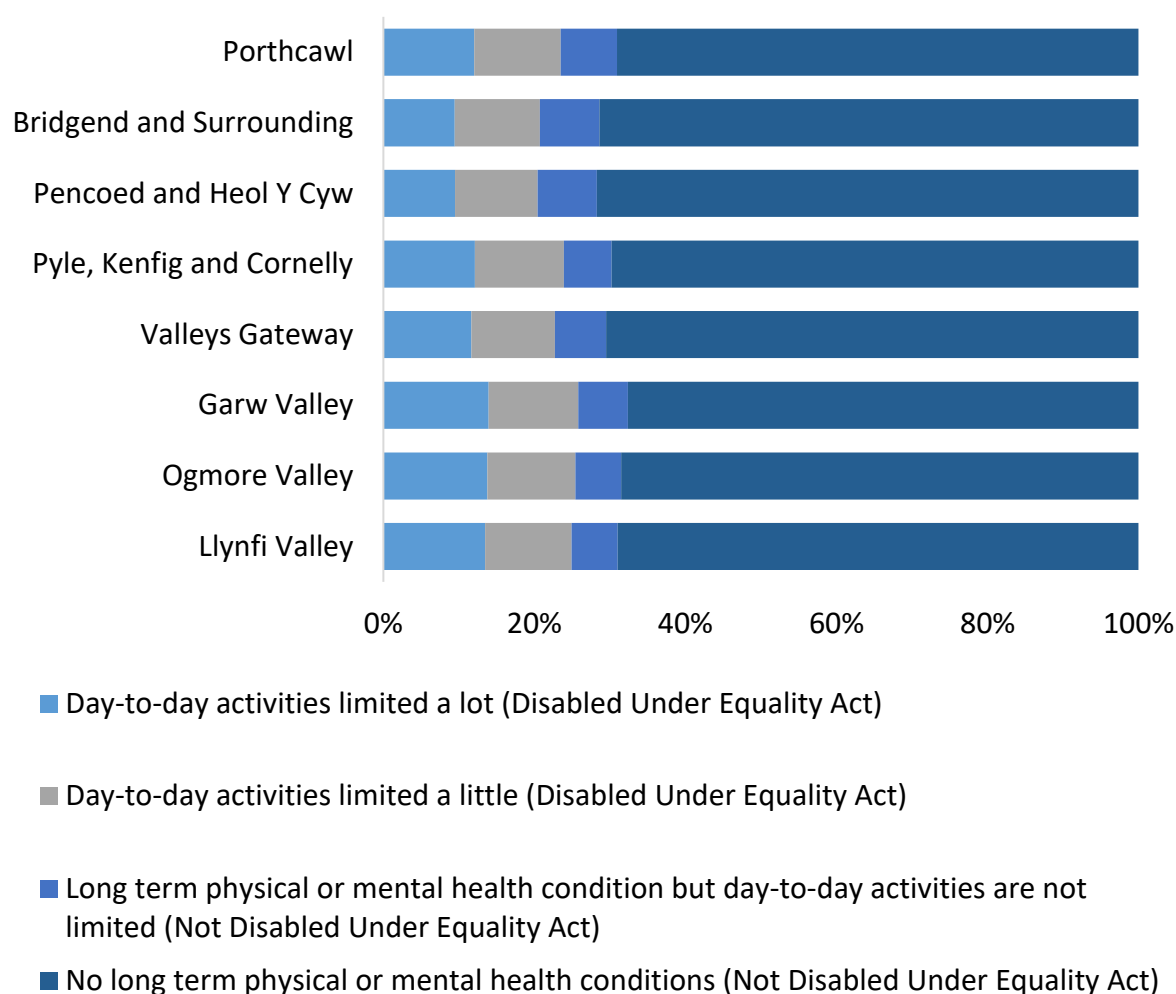
Data Source: 2021 Census

Population - Disability

3.1.9 The 2021 Census also provides estimates that classify households by the number of disabled people. People in a household who assessed their own day-to-day activities as limited by long-term physical or mental health conditions or illnesses are considered disabled. This definition of a disabled person meets the harmonised standard for measuring disability and is in line with the Equality Act (2010).

3.1.10 Figure 5 depicts the percentage of residents that considered themselves disabled and not disabled under the Equality Act by HMA. There is not an especially sizeable proportion of residents that stated their 'day-to-day activities were limited a lot' in any particular HMA, although 14% of Ogmore Valley and Garw Valley residents selected this category compared to 9% of residents within Bridgend and Surrounding. Conversely, the highest proportion of residents citing 'no long physical or mental health conditions' was found within Pencoed and Heol y Cyw (72% of all residents) and Bridgend (71%) compared to 68% in the Garw Valley. While this dataset does not indicate whether residents citing disabilities have any specific housing related needs, it does help to provide population-based context across the HMAs.

Figure 5: Age of Usual Residents by HMA (Percentage)

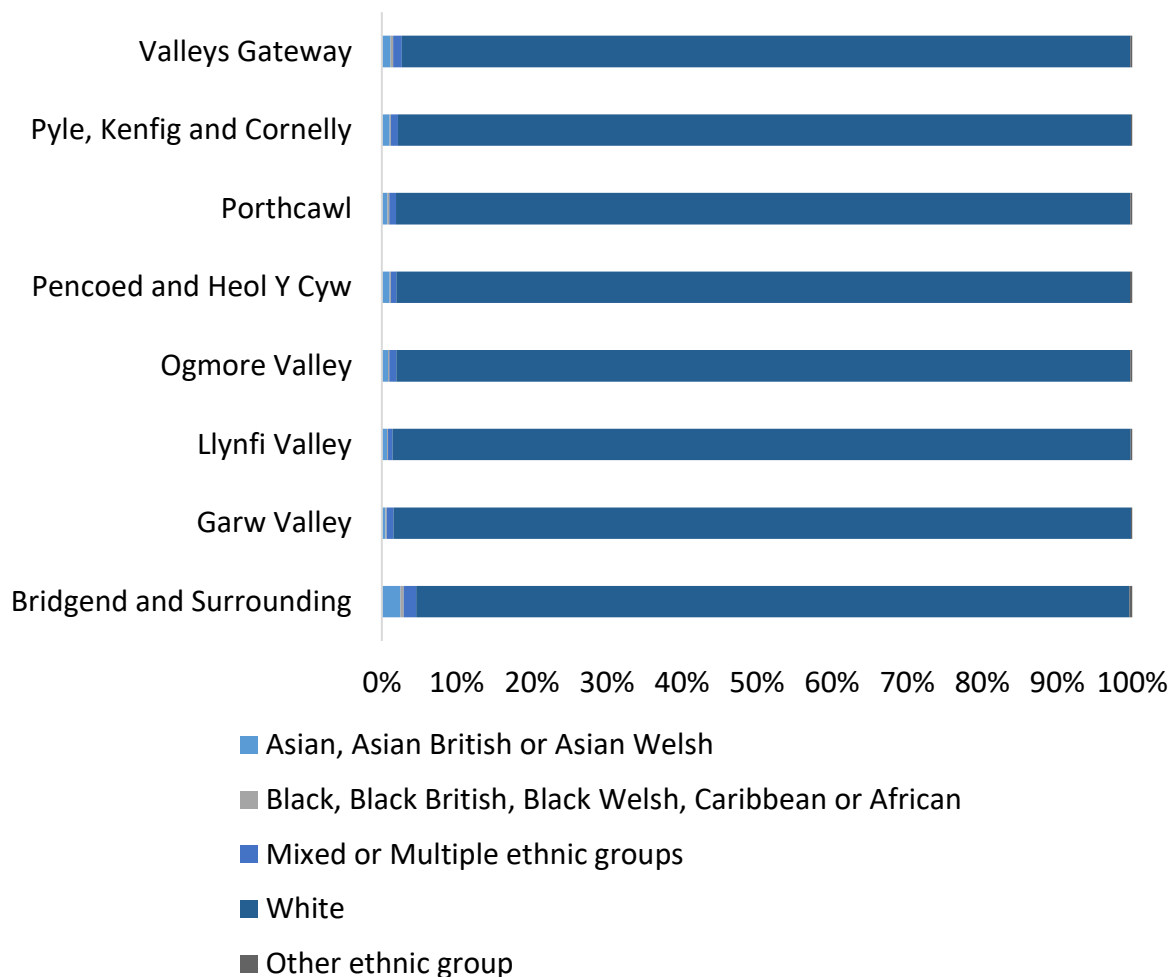


Data Source: 2021 Census

Population - Ethnicity

- 3.1.11 An additional Census 2021 dataset provides estimates that classify usual residents by their self-ascribed ethnic group. This could be based on culture, family background, identity or physical appearance. Figure 6 provides a high-level summary by HMA.
- 3.1.12 Evidently, there is not a particularly high concentration of Asian, Black, Mixed or Other ethnic groups in any HMA and the majority of residents described their ethnicity as White in all HMAs. However, Bridgend and Surrounding is the most diverse HMA, where 2.5% of residents described themselves as Asian (mainly Indian, Filipino and Chinese) and 1.7% as Mixed or Multiple Ethnic Groups (mainly White and Asian and White and Black Caribbean). The relatively higher level of diversity within Bridgend is most likely attributable to its size and function (as the county borough's principal town), with notable concentrations of services, facilities, employment opportunities and high accessibility to the wider regions.

Figure 6: Ethnic Group by HMA (Percentage)



Data Source: 2021 Census

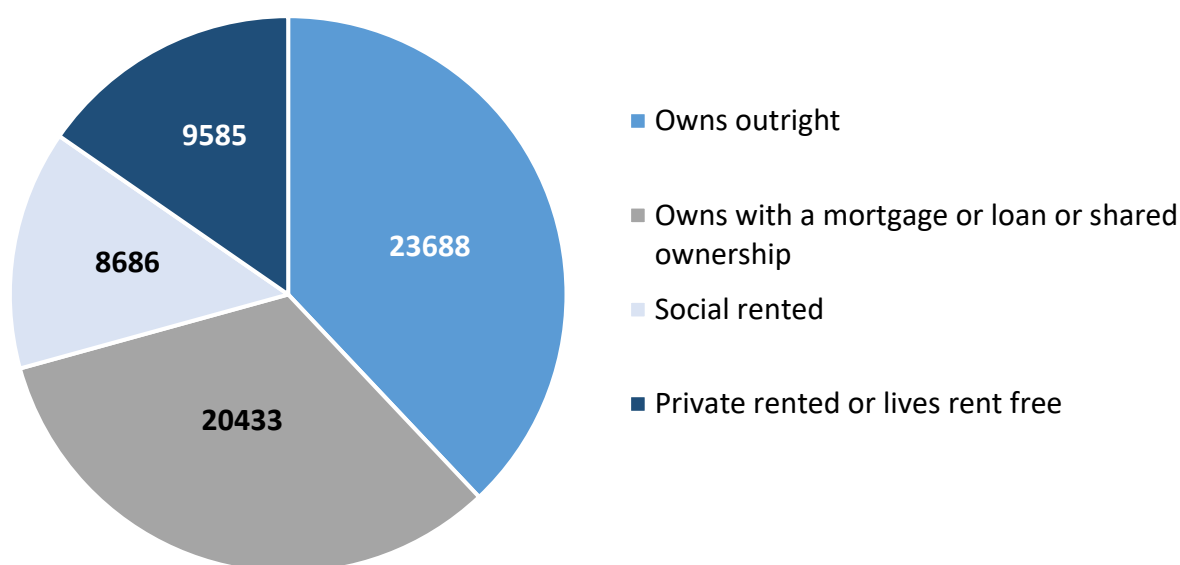
Number of Households

3.1.13 The 2021 Census also includes a household estimate (a household being defined as having at least one usual resident). The number of households across Wales increased from 1,302,676 in 2011 to 1,347,100 in 2021; a 3.4% increase. However, growth was not uniform across Wales, with three local authorities witnessing a decrease in household numbers (Gwynedd, Ceredigion and Blaenau Gwent). The local authorities that saw the highest increases were Newport (8.1% increase), the Vale of Glamorgan (7.5% increase) and Monmouthshire (7.0% increase). Bridgend also witnessed high proportionate household growth, with households increasing from 58,515 in 2011 to 62,360 in 2021; a 6.6% increase.

Analysis of Households by Tenure

- 3.1.14 At the time of the 2021 Census, owner occupation was by far the most common tenure within the county borough, accounting for 71% of all households; 38% of which owned their property outright and 33% owned their property through a mortgage or loan. Over 15% of all households resided within the private rented sector and a slightly smaller proportion of households (just under 14%) indicated that they live within the social rented sector. The overall tenure composition is depicted in Figure 7a.

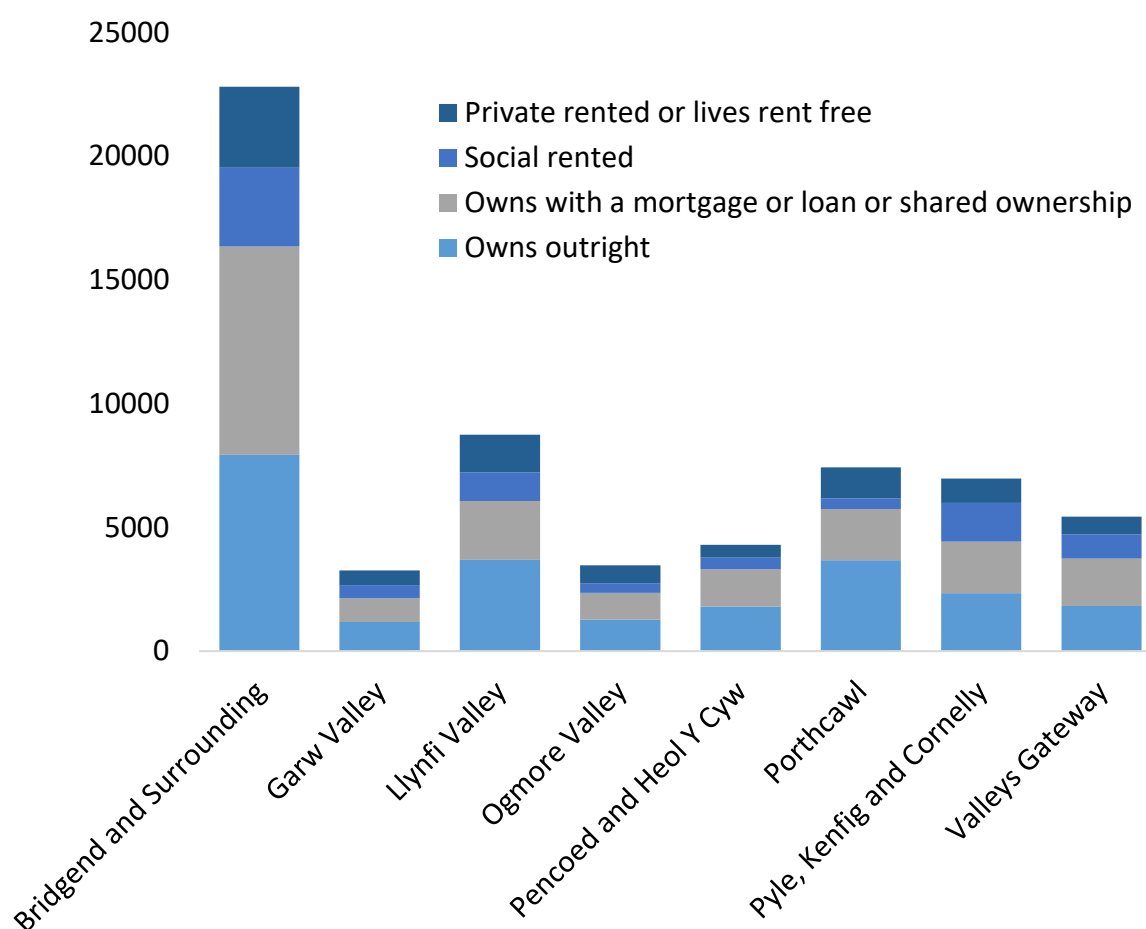
Figure 7a: Tenure Indicated by Households, Bridgend County Borough



Data Source: 2021 Census

- 3.1.15 However, there are inevitably differences within each HMA as illustrated by figure 7b. Owner occupation (either outright or through a mortgage or loan) was notably higher than average in both Porthcawl (77% of all households) and Pencoed and Heol Y Cyw (77%) HMAs. Furthermore, over 49% of households owned their properties outright in Porthcawl, which correlates with the aforementioned high proportion of residents at or approaching retirement age in this HMA. Conversely, residents within Pyle, Kenfig and Cornelly cited the lowest proportion of home ownership in the county borough at 63% of all households (33% outright and 30% with a mortgage or loan). Households within the private rented sector ranged from 21% in the Ogmore Valley to 12% in Pencoed and Heol Y Cyw, whereas households within the social rented sector ranged from 22% in Pyle, Kenfig and Cornelly to 6% of all households in Porthcawl.

Figure 7b: Number of Households by Tenure and HMA, 2021 Census



Data Source: 2021 Census

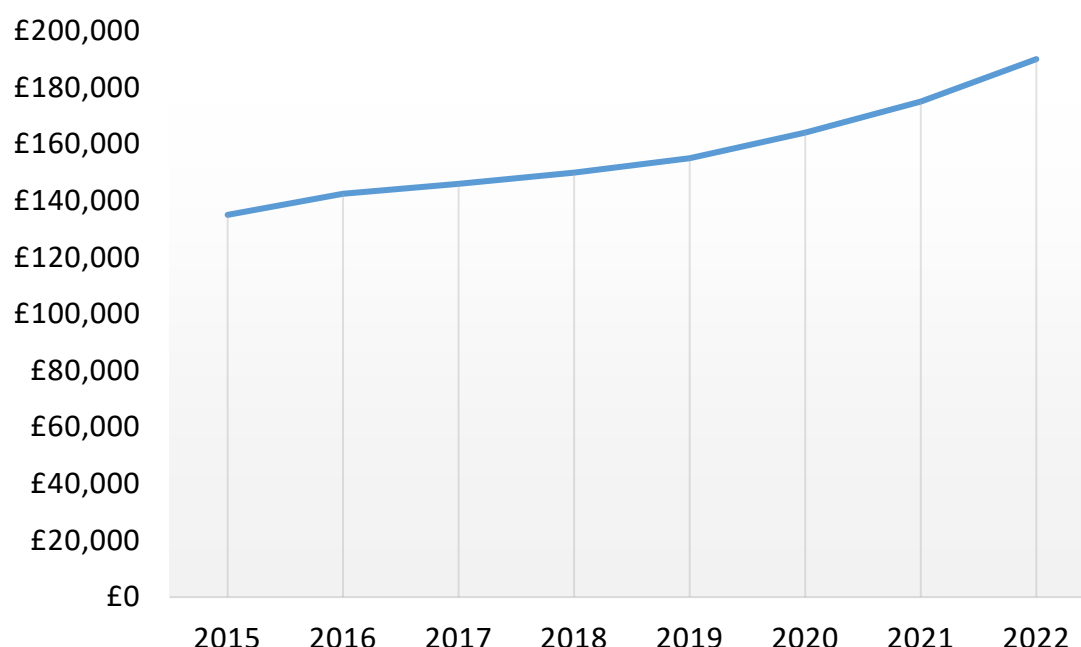
Owner Occupation – Property Price Trends

3.1.16 Land Registry Price Paid data has been scrutinised to determine the number of sales and the prices paid for all properties by age (new build or existing) and type (detached, semi-detached, terraced, flat or maisonette). Address level data has been aggregated to HMA level to provide a robust geographic overview of housing sales from 2015 to 2022. This illustrates the cost of entering and moving within the owner-occupation market for the purposes of this LHMA and how this has changed over time. Critically, the median price has been used in all cases to avoid atypical sales values (at the extremities) unduly affecting the average prices. The dataset does not include any valuations, which typically vary to the actual price paid (historically, valuations were not typically achieved, although offers were increasingly higher than valuations in the post pandemic housing market).

3.1.17 The median property price paid in Bridgend County Borough in 2022 was £190,000 based on sales only. This represents a notable rise of 9% since 2021, which is more than double the more gradual price increases of 2.5% to 3% per

annum witnessed from 2016 to 2019. After this point, the curve in Figure 8 clearly ascends more rapidly, which reflects the latent demand that accumulated during the pandemic and the related boom in property prices thereafter.

Figure 8: Median Price Paid for Properties in Bridgend County Borough



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3.1.18 Early indications suggest this rapid accent in property prices is unlikely to continue into the immediate future. In July 2023, the Principality Building Society reported that annual price rises across Wales are slowing, and “compared to the same period the previous year, the annual price rise is now under 1%, the largest slowdown in annual house price growth for almost a decade”¹. How far this general trend will materialise in relation to prices paid for properties in Bridgend County Borough will be assessed as part of future LHMA updates. Moreover, Figure 8 masks significant variations across HMAs as shown in Table 1 overleaf. In 2022, the lowest median price was found within the Garw Valley, at £110,000, and the highest median price paid was within Porthcawl, at £315,000. Bridgend and Pencoed HMAs are higher mid-price areas, whereas Pyle, Kenfig and Cornelly and the Valleys Gateway are lower mid-price areas.

¹ <https://principality.co.uk/en/about-us/Latest/20230717-House-prices-in-Wales-slow-as-interest-rates-continue-to-rise>

Table 2: Median House Prices in HMAs based on Sales

HMA	Median Property Price (2022)
Bridgend and Surrounding	£214,000
Garw Valley	£110,000
Llynfi Valley	£118,000
Ogmore Valley	£121,000
Pencoed and Heol-Y-Cyw	£215,000
Porthcawl	£315,000
Pyle, Kenfig and Cornelly	£175,000
Valleys Gateway	£176,050

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3.1.19 Each HMA's position in the local market is relatively well entrenched as shown by the longer-term trends within Figure 9 overleaf. The three Valleys HMAs represent one end of the market and exhibit the lowest median prices paid for properties in the county borough. The Llynfi Valley has typically attracted a premium over the Garw (+15%) and Ogmore (+12%) Valleys since 2015; reflecting the fact it is the second largest town in the county borough. However, this premium has narrowed in the past two years and the 2022 median price in the Ogmore Valley (£121,000) actually exceeded the median price in the Llynfi Valley (£118,000) for the first time in the past seven years. There has been no large-scale new development to explain why prices are now increasingly interchangeable between the three Valleys HMAs from a supply-side perspective. However, it could be attributable to a demand-side change that reflects the cost of living crisis, residents choosing to purchase properties in more affordable areas and prices rising as a result. Indeed, in August 2023, Hometrack reported that "levels of market activity are holding up better in more affordable markets", which bucks the more general trend of housing market stagnation due to "higher mortgage rates and cost-of-living pressures with weaker demand, fewer sales and very low house price growth"².

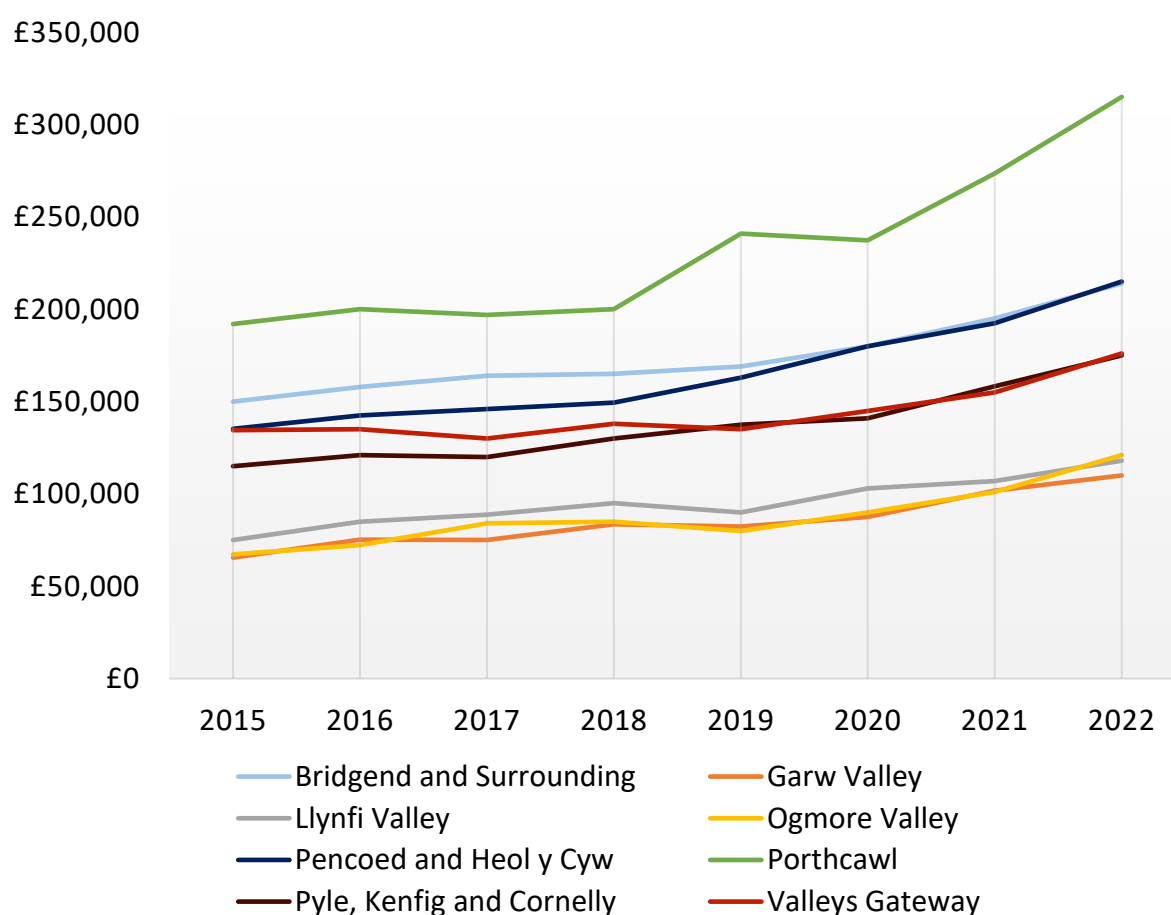
3.1.20 At the other end of the market, Figure 9 clearly shows Porthcawl attracts the highest median property prices, which have typically been 40% higher than the median price for the whole county borough since 2015. However, this has widened

² <https://www.hometrack.com/wp-content/uploads/2023/08/UK-House-Price-Index-Aug23-HT.pdf>

further in recent years and median prices in Porthcawl were 56% and 66% higher than the country borough average in 2021 and 2022, respectively. This serves to demonstrate the level of disparity in house prices across the county borough and how much further post pandemic price hikes have impacted upon the Porthcawl HMA.

- 3.1.21 There have also been gradual changes in the mid-market areas. While Bridgend typically attracted a premium of 10% over Pencoed from 2015 to 2018, median prices between the two HMAs have been relatively interchangeable since 2019 and Pencoed actually attracted a small premium of 0.5% over Bridgend in 2022. Similarly, properties within the Valleys Gateway achieved a median price of around 9% more than those in Pyle, Kenfig and Cornelly prior to 2018, yet have become increasingly interchangeable ever since. This suggests establishment of an upper mid-market and lower mid-market within the county borough, respectively.

Figure 9: Median Price Paid for Properties by HMA, 2015-2022

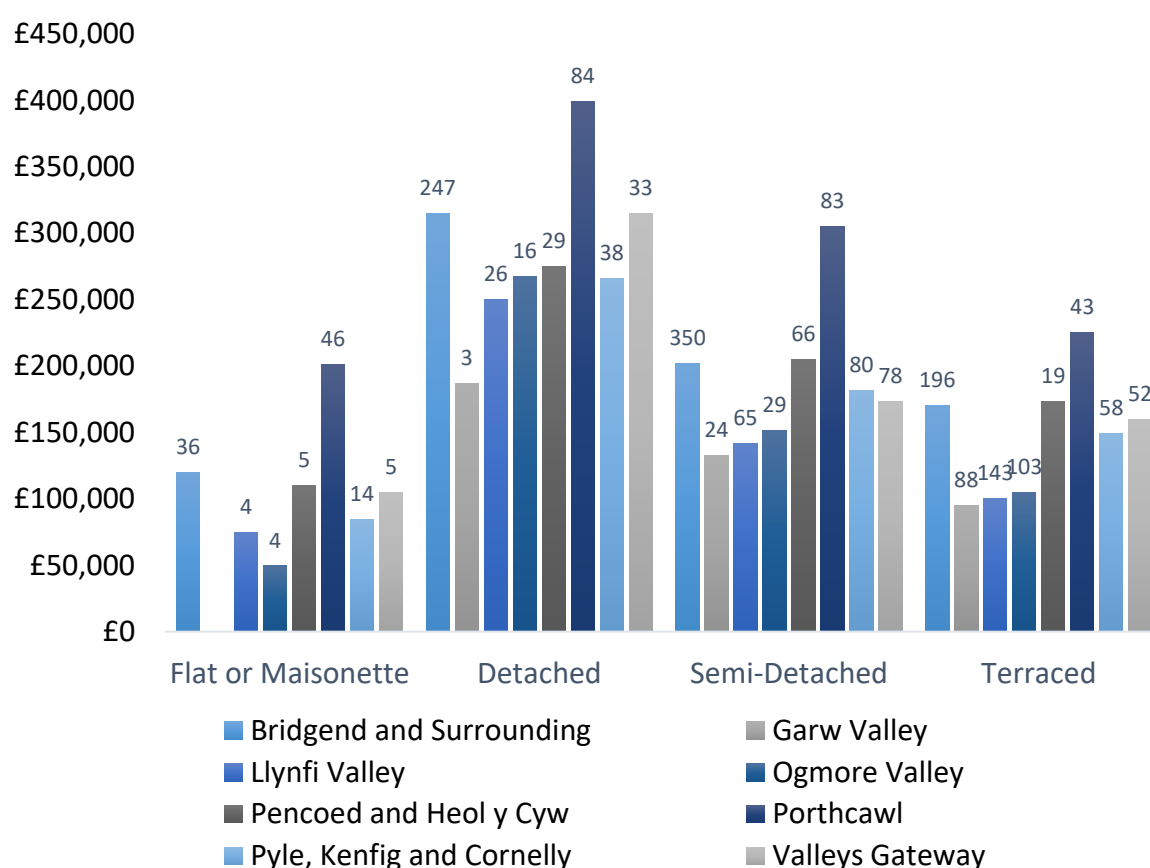


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Owner Occupation – Sales (Volume) Trends

3.1.22 Figure 10 further helps to contextualise the difference between HMAs by illustrating the number of sales and median prices achieved for different property types in 2022. There is a clear uplift in price between property types. In 2022, semi-detached properties typically sold for 20% more than terraced properties in the mid-market areas of Bridgend, Pencoed and Pyle, Kenfig and Cornelly. This premium was greater in Porthcawl (30%) and even more notable in the Valleys HMAs (over 40%). This latter trend is perhaps unsurprising given the dominance of the terraced housing market in Valleys HMAs and the relative scarcity of lower density semi-detached housing. Detached property sales were evidently fewer in number and attracted even larger premiums over semi-detached sales in all HMAs (ranging from 31% in Porthcawl to 82% in the Valleys Gateway).

Figure 10: Median Price Paid for Properties by Type, Volume and HMA, 2022



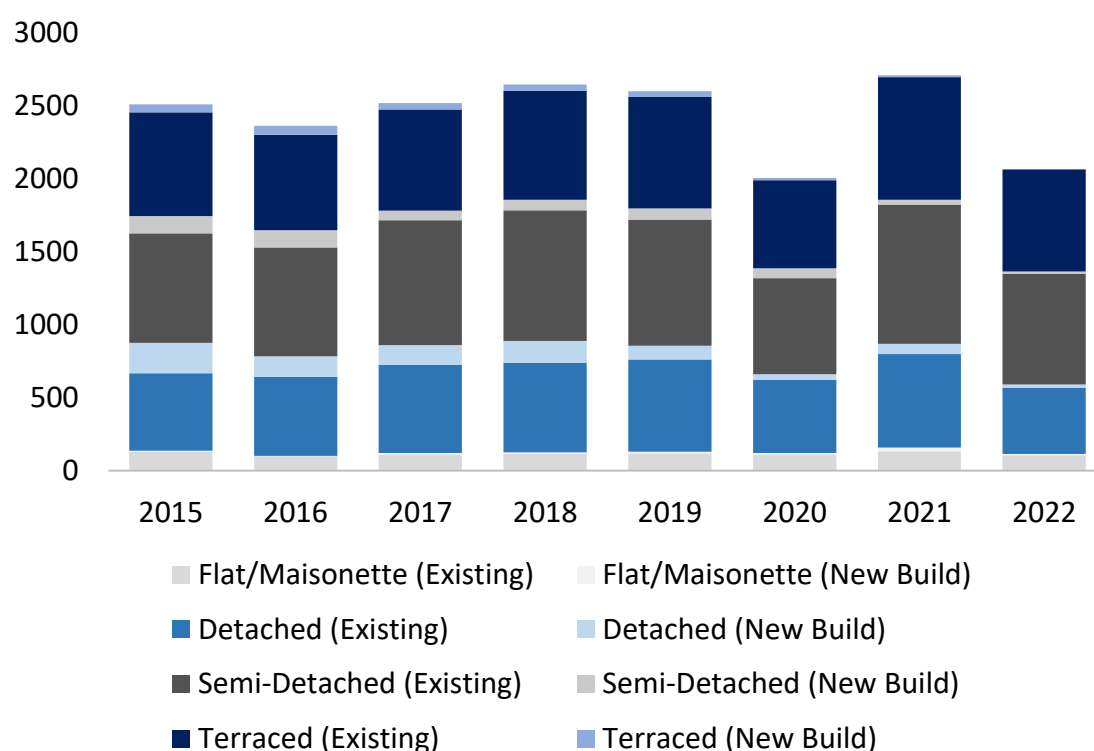
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3.1.23 Moreover, a greater number of semi-detached and detached properties sold in mid to higher priced areas and terraced property sales dominated the Valleys HMAs.

This phenomenon alone has an impact on the overall median price paid for properties in different HMAs. However, the type of property being sold is clearly not the only determinant of price. At the extremes, a median priced terraced property in the Garw Valley sold for £190,000 in 2022, compared to £225,000 for a terraced property in Porthcawl. This represents an 18% premium on what can be considered an 'entry level' property at a distance of less than 15 miles.

- 3.1.24 This latter factor is even more pronounced due to the minority of flat and maisonette sales, which contributed to a small proportion of the county borough's active housing market in 2022. The highest number of flats or maisonettes sold were in Porthcawl; accounting for 18% of all property sales in that HMA in 2022. However, with a median price of over £200,000, the question of affordability is poignant, as considered in the housing need calculation section of this LHMA. Flats and maisonettes contributed to a far smaller proportion of the total number of sales in other HMAs, typically 4-5% in mid-market areas and even lower percentages in Valleys HMAs, where there is a notable dearth of such properties across the stock.

Figure 11: Volume of Property Sales by Type and Age, 2015-2022



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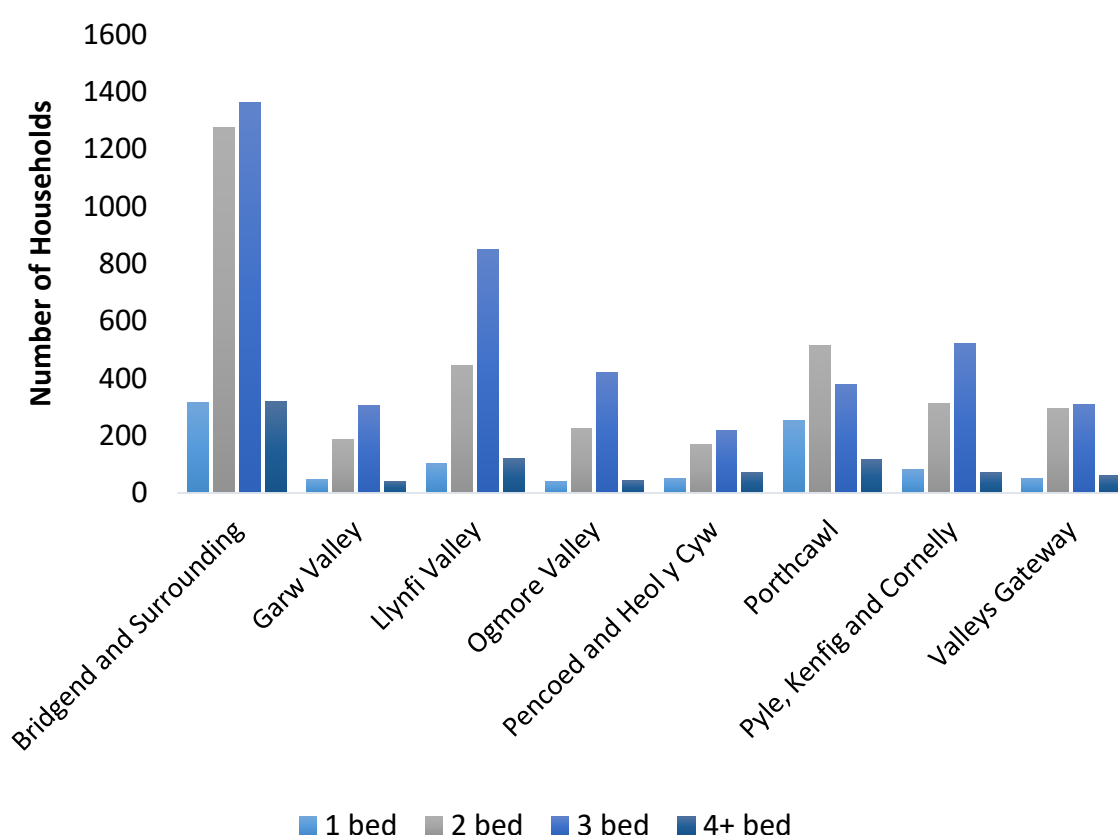
- 3.1.25 Figure 11 provides a longer-term overview of property sales by type and age of property. The total number of property sales was relatively stable between 2015 and 2019; climbing gradually to just above 2,500 in 2019. The proportion of property types sold across the county borough was also relatively stable over this four-year period; at 29% detached, 36% semi-detached, 30% terraced and 5% flats and maisonettes.
- 3.1.26 New build sales typically accounted for 10-15% of all sales over this period; primarily through semi-detached and detached houses. This correlates with feedback from local house builders, who reported that the 3 bedroom semi-detached market was one of the strongest in the new build sector at the time and also that larger, more expensive house types became increasingly accessible to first time buyers through Help to Buy Wales. It is therefore no coincidence that there was a resurgence in the construction and sale of larger new build house types from 2015 to 2019. The impacts of the pandemic explain the drop in sales in 2020, followed by a post pandemic boom in 2021 and then a further slump in house sales in 2022 due to the onset of the cost-of-living crisis. The proportion of new build property sales recorded by Land Registry halved during those two years. Moving forward, the RLDP seeks to enable an appropriate mix of dwelling sizes and types on new build sites to meet local housing need and foster sustainable, balanced communities. A preponderance of new, larger dwelling types should be avoided and developments must seek to provide a suitable range of housing types to meet the needs of households in the county borough.

Private Rented Sector – Property Type

- 3.1.27 Over 15% of households within the county borough (nearly 10,000) stated that they resided within the private rented sector at the time of the 2021 Census. This implies that the sector was slightly larger than the social rented sector (just under 14%) in 2021; emphasising the significance of private rented accommodation in the context of the whole housing market.
- 3.1.28 Figure 12 overleaf illustrates the type of properties occupied in the local private rented sector by bedroom size at the time of the 2021 Census. There are however two caveats in this respect. Firstly, this data does not take any unoccupied properties (that had previously been rented privately) into account, although there are no guarantees that such dwellings would remain in the private rented sector in any case. Secondly, this dataset provides no indication of the availability of private rented sector accommodation, yet it does help to exemplify the type of private rented properties households were occupying in 2021.
- 3.1.29 Most households typically rented three bedroom dwellings in the majority of the private rented markets, particularly in Valleys HMAs. However, there were some

exceptions. Bridgend contained a similar number of households renting two bedroom dwellings (1,200) to three bedroom dwellings (1,400) within the private rented sector, as did the Valleys Gateway (300 dwellings of each size). Porthcawl was the only HMA that differed in this respect as households renting two bedroom dwellings (500) were most common within the private rented sector, albeit households renting three bedroom dwellings were still notable (400). Households renting one and four + bedroom dwellings were far less common in all housing markets and there was a notable dearth of households renting such dwellings in Valleys HMAs.

Figure 12: Households Renting Privately by Number of Bedrooms

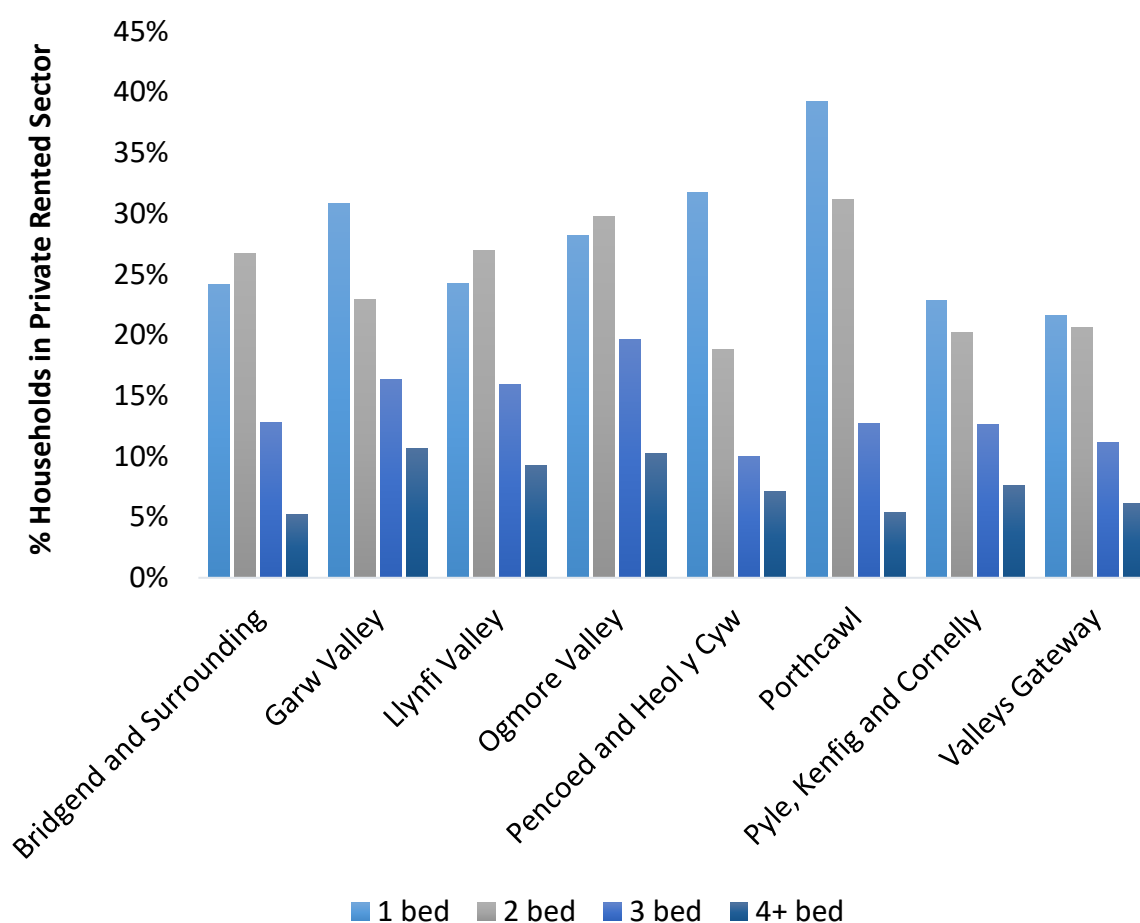


Data Source: 2021 Census

3.1.30 In order to further contextualise this dataset, Figure 13 illustrates the percentage of households residing within the private rented sector in each HMA and by property size. Although three bedroom dwellings were most common in absolute terms, Figure 13 shows that under 20% of households residing within three bedroom dwellings were private rented tenants in all HMAs. Conversely, whilst the number of households renting one bedroom dwellings was small, they typically accounted for a quarter of all households residing in one bedroom dwellings across each HMA. The highest proportions of households renting privately were

found within one bedroom dwellings in Porthcawl (39% of all households occupying this dwelling type), and 2 bedroom dwellings in Porthcawl (31%), the Ogmore Valley (29%) and Bridgend and Surrounding (27%). Households renting four bedroom dwellings privately were clearly not only scarce in absolute terms, but also relative terms. Even where the percentage was highest (in the Ogmore Valley), only 11% of households occupying four bedroom dwellings were renting privately.

Figure 13: Households Renting Privately by Number of Bedrooms (%)



Data Source: 2021 Census

Private Rented Sector - Rents

- 3.1.31 In addition to understanding the nature of properties occupied by households in the private rented sector, it is also important to understand how private rents vary across different areas. Existing data is however limited in this respect and comprehensive records of private rents are unavailable in the same manner as for housing sales.

- 3.1.32 Welsh Government Rent Officers collect evidence of rents paid in the private rented sector based on information voluntarily provided by individual private landlords and letting agents. This data is now being made available to Local Authorities for LHMA purposes. This represents a sample of the market (just over 15% of private rented properties in Bridgend County Borough compared to 2021 Census data), including both new lettings and continuing lettings, with and without rental increases. This exercise enables average rent percentiles to be generated as shown in Table 3 overleaf. As these percentiles are based on a sample of achieved rents (as opposed to advertised rents, which may not be achieved in practice), they do represent what existing households are paying to rent within the sector. However, the sample is likely to be weighted by the rents long-term tenants are paying. Such long-term rents may not have increased in line with wider market inflation if, for example, a landlord provides a rent-based incentive to retain a 'good tenant' and/or tenants have postponed moving to avoid paying 'new let premiums'. Indeed, Hometrack recently reported rents for new lets are up by an average of £2,772 per annum across the UK based on data over the last three years (September 2023). This reflects the fact that "landlords are seeking to maximise the rent for new tenancies to cover increased costs"³, thereby compounding cost-of-living pressures for those seeking new tenancies in the private sector. The derived percentiles within Table 3 should therefore be considered a lower estimate of the true cost of entering the private rented sector, while acknowledging data available on private rents is limited and there are pros and cons to using alternative data sources.
- 3.1.33 Clearly, the bulk of the sample is based on two and three bedroom properties, which reflects the data from the 2021 Census as outlined in the previous section. Sample sizes for one bedroom properties were smaller across each HMA, although sufficient to generate percentile based averages. However, the number of four bedroom properties in the sample was much smaller in comparison, which is unsurprising given the relative dearth of such properties within the local private rented sector. The Rent Office advise utilising at least five records to generate robust averages and so, where necessary, samples have been bolstered with local private rent data held by the Council (sourced from Common Housing Register applications); comparable in that such records are also 'achieved' rents.
- 3.1.34 As shown in Table 3, private rents follow a similar pattern to house prices, with Porthcawl being the most expensive HMA. This is particularly notable in larger property sizes, with median three bedroom rents being 21% higher than in Bridgend and Surrounding and median four bedroom rents being 27% higher, respectively. When analysing house prices, Bridgend and Surrounding and Pencoed and Heol-Y-Cyw formed the 'upper-mid market' and the Valleys Gateway and Pyle, Kenfig Hill and Cornelly formed the 'lower-mid market'.

³ <https://www.hometrack.com/wp-content/uploads/2023/09/UK-rental-market-report-Sept-2023-HT.pptx.pdf>

However, there is less of a pronounced distinction between these four HMAs in the private rented sector and there are variances across different property sizes. For instance, the sample showed that median private 1 bedroom rents were higher in Pyle, Kenfig and Cornelly (£550 per calendar month) than in both Bridgend and Surrounding and Pencoed and Heol-Y-Cyw HMAs (£490 per calendar month). This suggests the private rental market is more fluid than the home ownership market in the mid-priced areas, albeit there is still an approximate premium of £50 per calendar month to rent a 3 bedroom property in Bridgend compared to the other three aforementioned HMAs.

Table 3: Calendar Monthly Rents 2022/23, Bridgend County Borough and HMAs

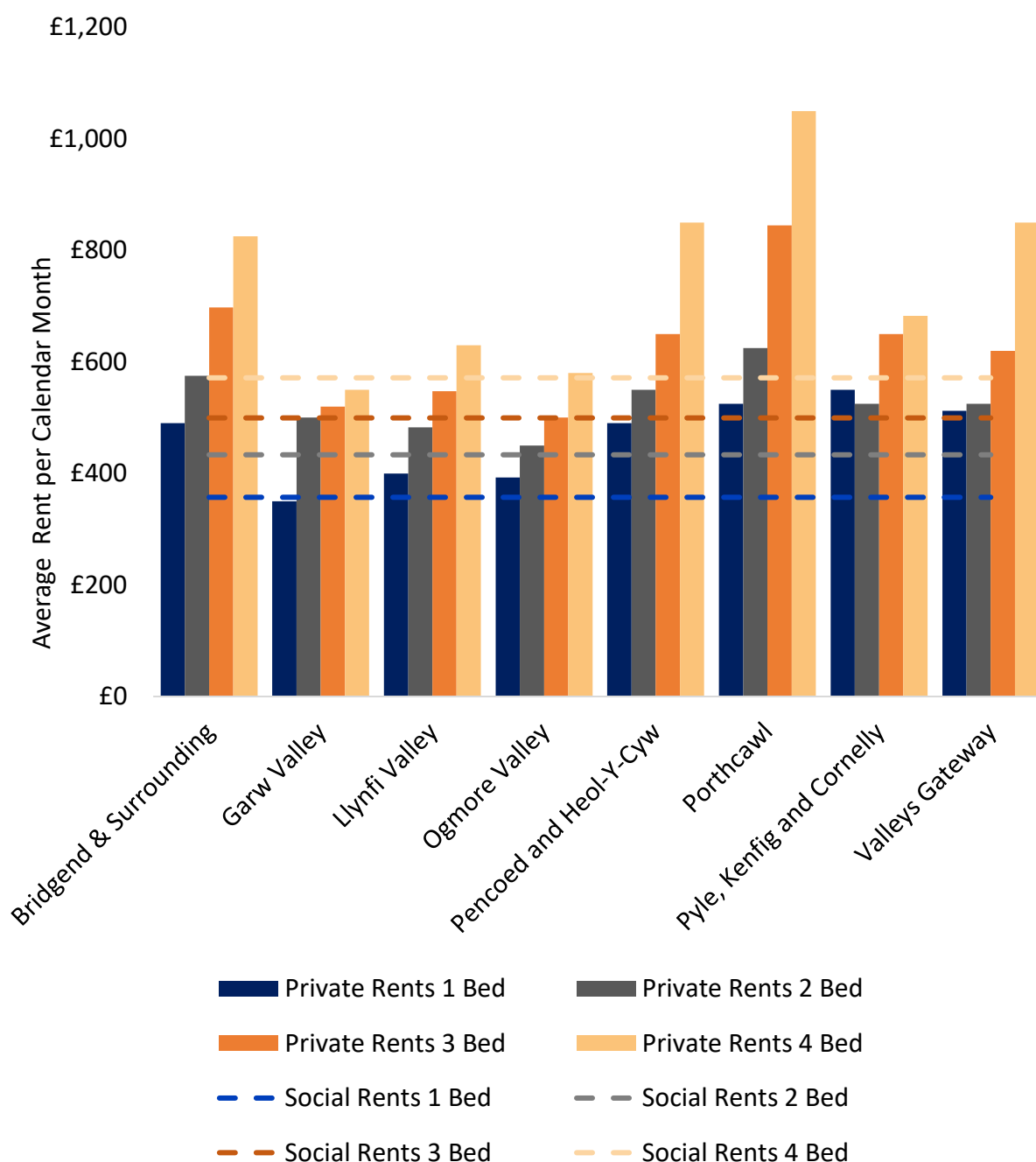
HMA	Number of Rentals				Rents at the 30 th Percentile Position				Rents at the 50 th Percentile Position			
	1 Bed	2 Bed	3 Bed	4 Bed	1 Bed	2 Bed	3 Bed	4 Bed	1 Bed	2 Bed	3 Bed	4 Bed
Bridgend and Surrounding	46	235	216	33	£438	£525	£625	£787	£490	£575	£698	£825
Garw Valley	27	27	54	*5	£350	£445	£475	*£510	£350	£500	£520	*£550
Llynfi Valley	19	84	158	9	£379	£450	£477	£612	£400	£483	£548	£630
Ogmore Valley	6	39	57	*5	£380	£433	£474	*£556	£393	£450	£500	*£580
Pencoed and Heol-Y-Cyw	7	37	31	10	£462	£533	£625	£834	£490	£550	£650	£850
Porthcawl	21	40	29	*6	£500	£587	£750	*£975	£525	£625	£845	*£1,050
Pyle, Kenfig and Cornelly	12	49	49	*6	£508	£500	£600	*£658	£550	£525	£650	*£683
Valleys Gateway	10	45	43	8	£450	£500	£565	£687	£513	£525	£620	£850

Data Source: Rent Office Wales data

* Sample sizes have been increased by combining Rent Office data with local data sourced from the Common Housing Register

3.1.35 The three Valleys HMAs contain the most affordable private rents, although there is a small premium to rent in the Llynfi Valley compared to the Ogmore and Garw Valleys. Perhaps most significantly, and as illustrated in Figure 14, there is a very narrow gap between average private rents and average social rents within the Valleys HMAs.

Figure 14: Average Social Rents Compared to Average Market Rents



Data Source: Rent Office Wales and Stats Wales

- 3.1.36 This is particularly notable in the Garw Valley, where one and four bedroom private rents are slightly below social rents and three bedroom private rents are only 4% higher than social rents. Similarly, private rents are typically no more than 4% above social rents in the Ogmore Valley and typically no more than 11% above social rents in the Llynfi Valley. This is a unique characteristic of the Valleys HMAs and produces atypical market dynamics. For one, tenants can move interchangeably between private and social tenures due to comparative affordability, compounded further by the relative uniformity of the local dwelling stock. Turnover and sustainability of tenancies can be affected, with the formation of 'micro' housing markets due to a complex range of socio-economic and historical factors. Tenure can play less of a factor in the entrenchment of such micro housing markets than elsewhere in the county borough, especially when private and social rents are so interchangeable.
- 3.1.37 This issue also limits how far certain types of affordable housing can meet housing need in the Valleys HMAs from a supply side perspective. There is ultimately no gap to introduce a discounted rental product (i.e. intermediate rent) within the Garw and Ogmore Valleys as any discount on market rent would produce a product that is below social rent. Similarly, such a product can only be introduced within higher priced parts of the Llynfi Valley where a discounted market rent would still be above social rented and effectively meet housing need in the 'squeezed middle'. This is an important consideration when analysing the housing need outputs as a careful mix of intermediate and social dwellings will be necessary to deliver any identified housing need in these areas.

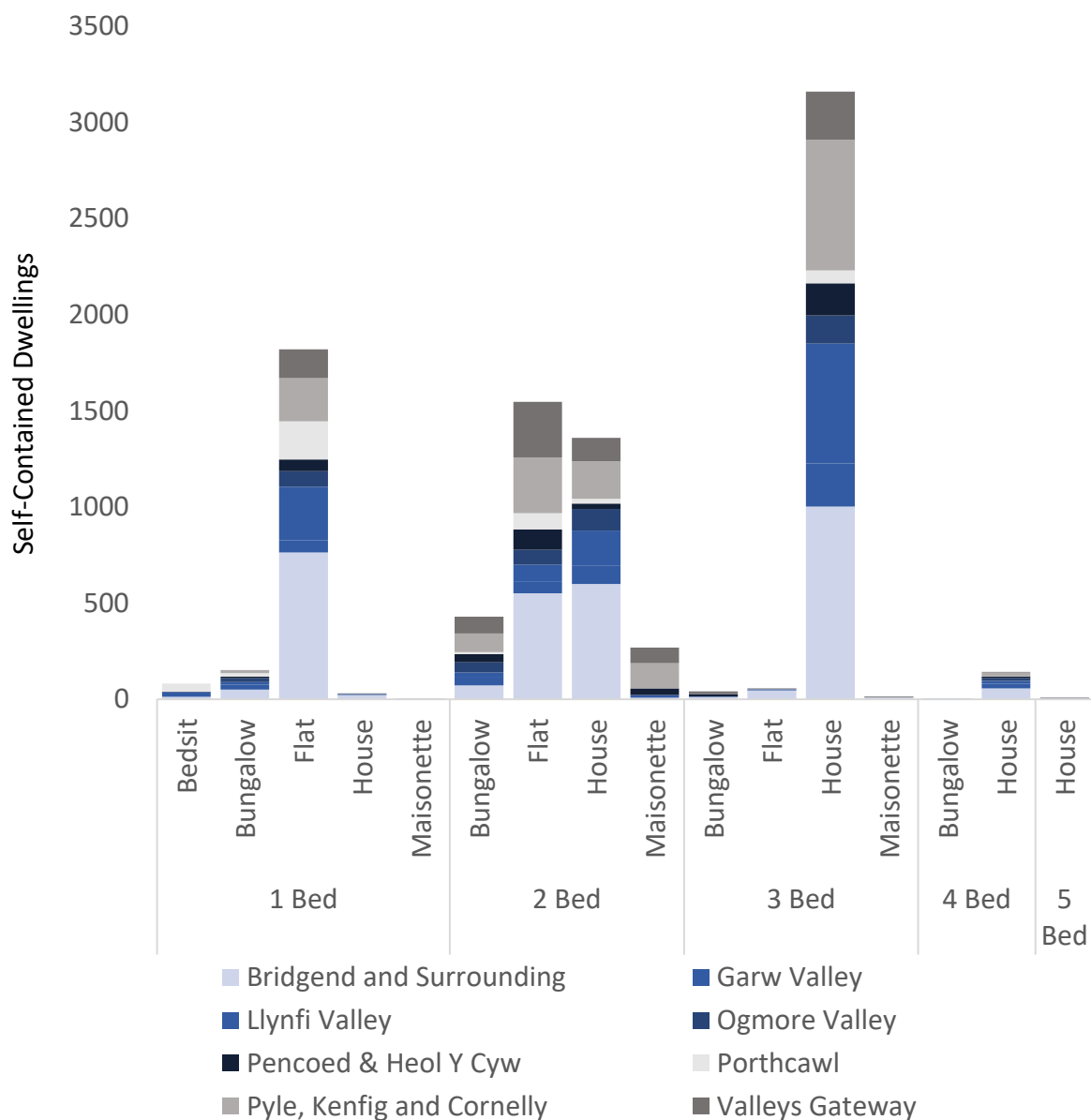
Social Rented Sector – Stock

- 3.1.38 Viewing the stock profile in isolation does not identify the availability of or demand for different property types in different areas, yet it is a fundamental starting point in understanding the local social rented sector. As of April 2023, locally operating RSLs reported there were 9,100 self-contained, social rented dwellings across the county borough, which equates to 13.8% of all dwellings (based on March 2022 dwelling stock estimates). Figure 15 provides a geographic breakdown of self-contained social rented stock by number of bedrooms and property type (NB. dwelling stock numbers vary to the previously documented household numbers as the two datasets are not comparable and collected through different means, at different time periods).
- 3.1.39 Overall, it is clear that there are more two and three bedroom homes than any other dwelling size; accounting for 40% and 36% of the social rented stock, respectively. This is strongly akin to the overall composition of the housing market, although there is a slight weighting towards flats rather than houses across the 2 bed social rented stock. There are, nevertheless, geographical variances. Three bedroom properties are far more common in the Llynfi Valley especially (49% of

all social rented dwellings) and one bedroom properties are the predominant dwelling size in Porthcawl (57% of all social rented dwellings). Four+ bedroom properties make up a small proportion of the overall social housing stock in all HMAs.

- 3.1.40 As also shown in Figure 15, the highest level of social rented accommodation is found within Bridgend and Surrounding (35% of the total), which is unsurprising given that this is the most densely populated part of the county borough. Conversely, the lowest absolute stock totals are found in Porthcawl (5%), Pencoed (5%), and the Ogmore (6%) and Garw (6%) Valleys.

Figure 15: Social Rented Dwelling Stock, Bridgend County Borough

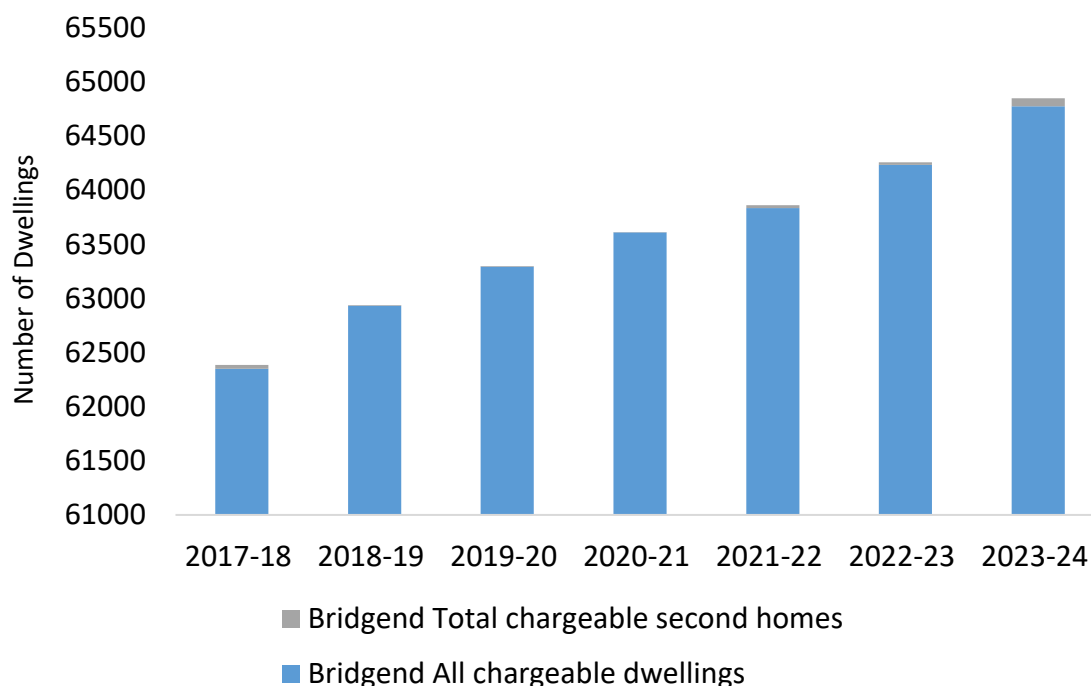


Data Source: RSL Stock Lists

Second Homes

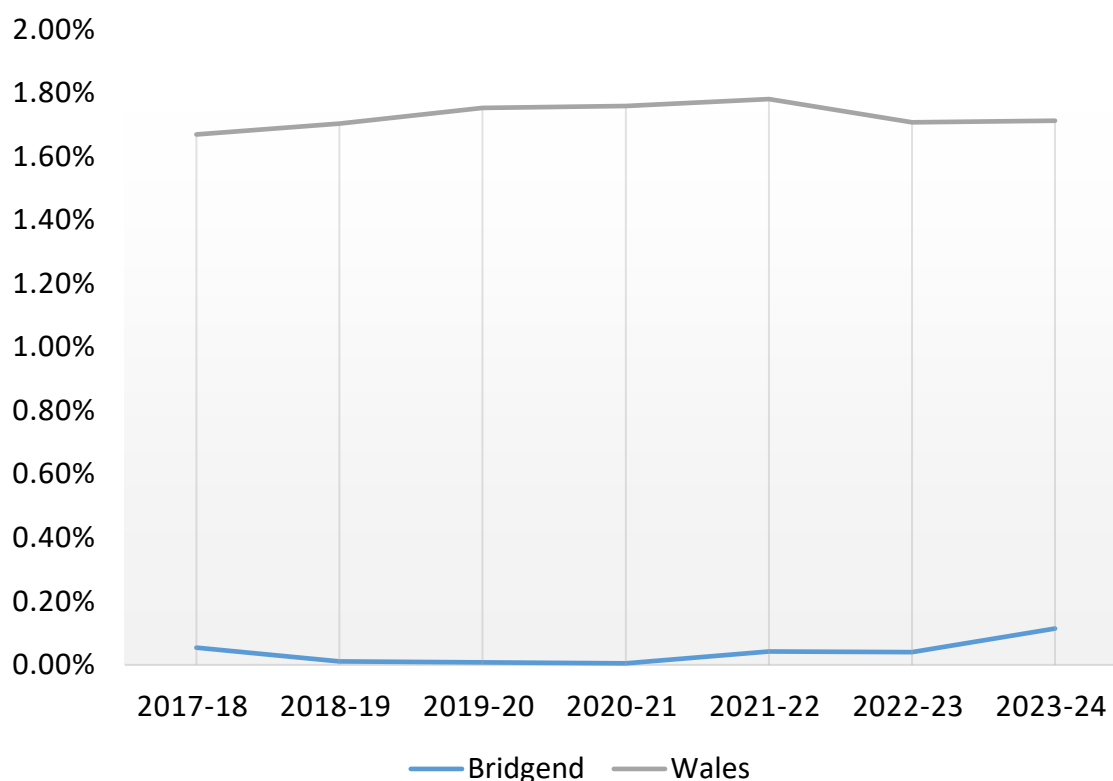
- 3.1.41 It is also important to consider the level and proportion of second homes across the county borough to understand whether there are any implications for the supply of affordable housing and any impacts on the Welsh language. Welsh Government conducts the annual council tax dwellings survey; providing data on the number of dwellings eligible for full council tax, discounts and exemptions in each local authority for the next financial year, including second homes.
- 3.1.42 Figure 16 illustrates that the number of second homes in Bridgend County Borough has fluctuated over the last seven years, although the number has remained low in absolute terms, notwithstanding a minor spike in 2023/24. It is perhaps most helpful to consider this in relative terms. Based on council tax data, the total chargeable second homes as a percentage of all chargeable dwellings has remained at or below 0.1% in Bridgend County Borough compared to at or below 1.8% throughout Wales as a whole. Indeed, as shown in Figure 17, the proportion of second homes in Bridgend County Borough has been and remains significantly below the Welsh average in relative terms. This combined with the fact that there are no notable concentrations of Welsh speakers across the county borough signify that second homes do not pose any significant implications for Welsh speakers, the supply of affordable housing or otherwise.

Figure 16: Chargeable Council Tax Dwellings and Second Homes, Bridgend



Data Source: Stats Wales

Figure 17: Second Homes as a Percentage of All Chargeable Dwellings



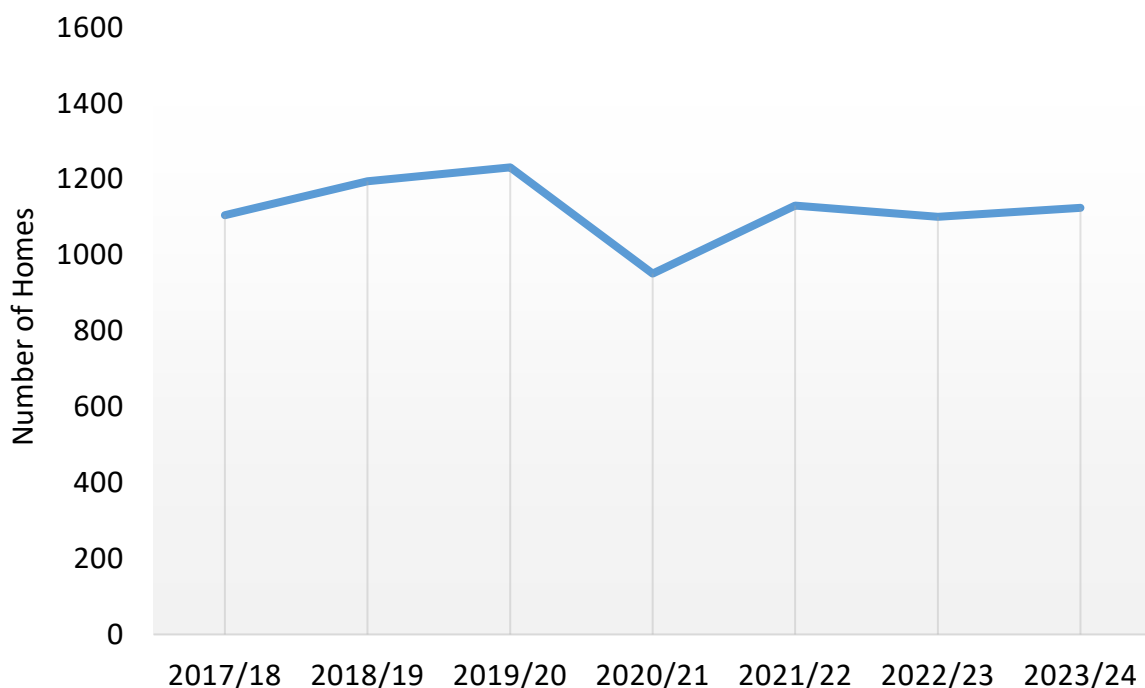
Data Source: Stats Wales

Empty Homes

- 3.1.43 It is acknowledged that local housing markets are fluid and there will always be residential properties becoming empty and others returning to occupation within any one period. Properties that are empty for less than six months do not typically require any intervention and are actually an important element of the housing market to facilitate 'churn'. However, properties that are vacant for longer periods are less likely to be transactional empty homes, are not actively contributing to meeting housing need and can illustrate a mismatch between supply and demand. Moreover, long-term empty homes can attract crime, vandalism and anti-social behaviour, thereby contributing to a sense of deprivation in communities. Returning empty homes to beneficial residential use can not only combat these issues but also meet housing need by increasing latent supply. Larger scale intervention can also encourage other complementary forms of investment, which can be necessary to combat wider instances of low demand within areas and ensure a long-term reduction in the overall number of long-term empty homes.

3.1.44 As shown in Figure 18a, the number of long-term empty homes (i.e. empty for six months or more) has remained relatively similar in scale within the county borough since 2017/18 and recent trends do not indicate a significant departure. There have been typically 1,100 empty homes within Bridgend County Borough each year over the past seven years, notwithstanding one notable dip to 950 in 2021/22, which is most likely attributable to pandemic related lockdowns and associated housing market inactivity. This number of empty homes equates to just under 2% of all dwellings. However, the successive snapshots within Figure 18a shouldn't be misinterpreted as a static group of 1,100 homes that have all remained continually empty over this period. The overall total is fluid, comprising properties continually being returned to use and then others becoming vacant in their place.

Figure 18a: Long-Term Empty Homes (6 Months+), Bridgend County Borough

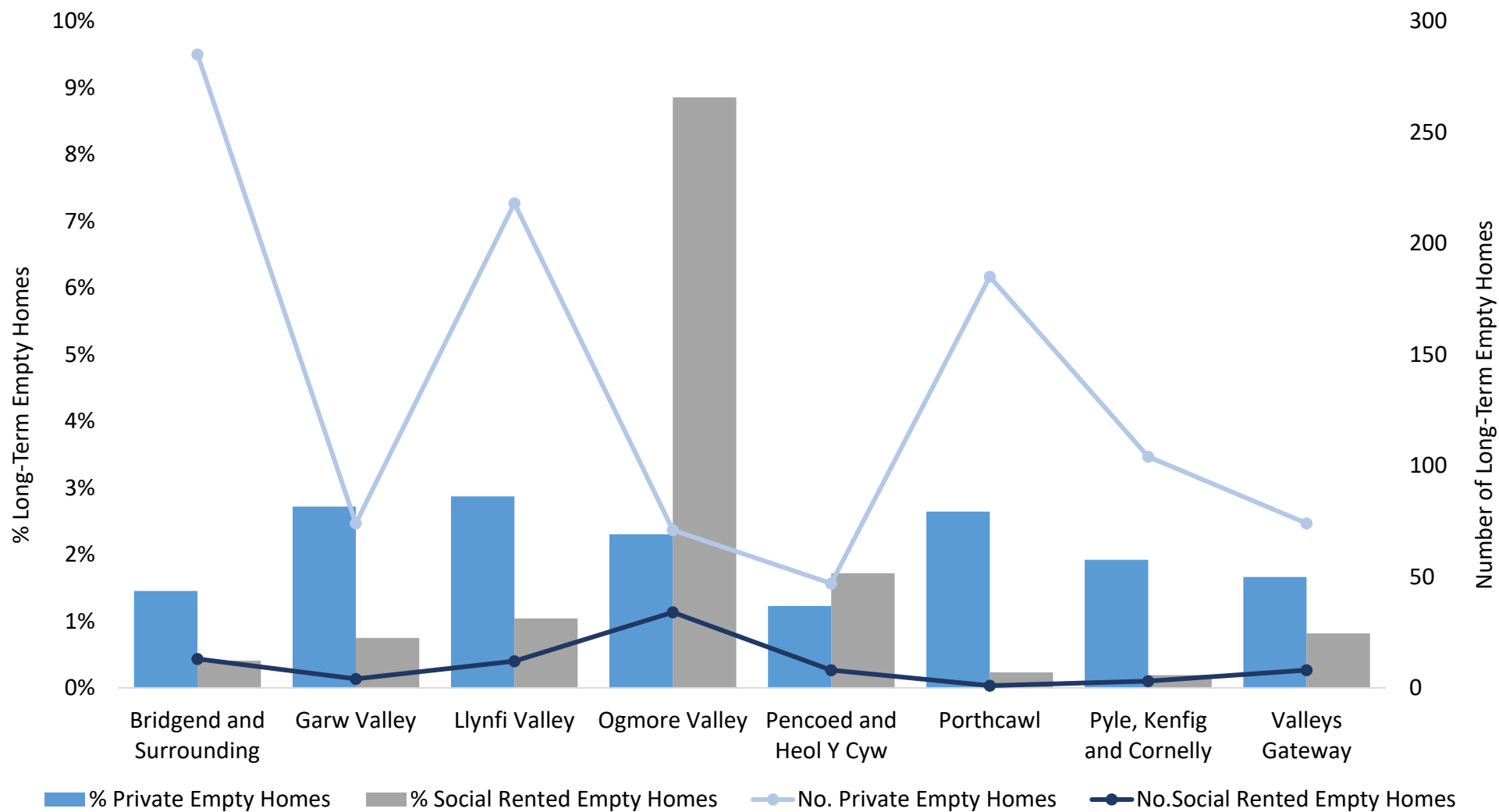


Data Source: Council Tax Records

3.1.45 Qualitative data is not held on property types, condition or why such properties are empty, although all homes are ultimately empty for a reason. Areas that contain persistently high numbers of empty homes, despite proactive attempts to return them to beneficial use, can be a key indicator of low market demand or signify broader socio-economic issues within a locality.

3.1.46 In order to contextualise these broader trends by area, Figure 18b provides a breakdown of long-term empty homes by HMA and tenure. This is based on an August 2023 snapshot to provide the latest data available. As well as providing the total number of long-term empty homes by HMA, Figure 18b also uses 2021 Census data to illustrate long-term empty homes as a percentage of all private and social rented homes for proportionate comparison.

Figure 18b: Long-Term Empty Homes (Total and Percentage by HMA and Sector)



Data Source: Council Tax Records (August 2023 Snapshot)

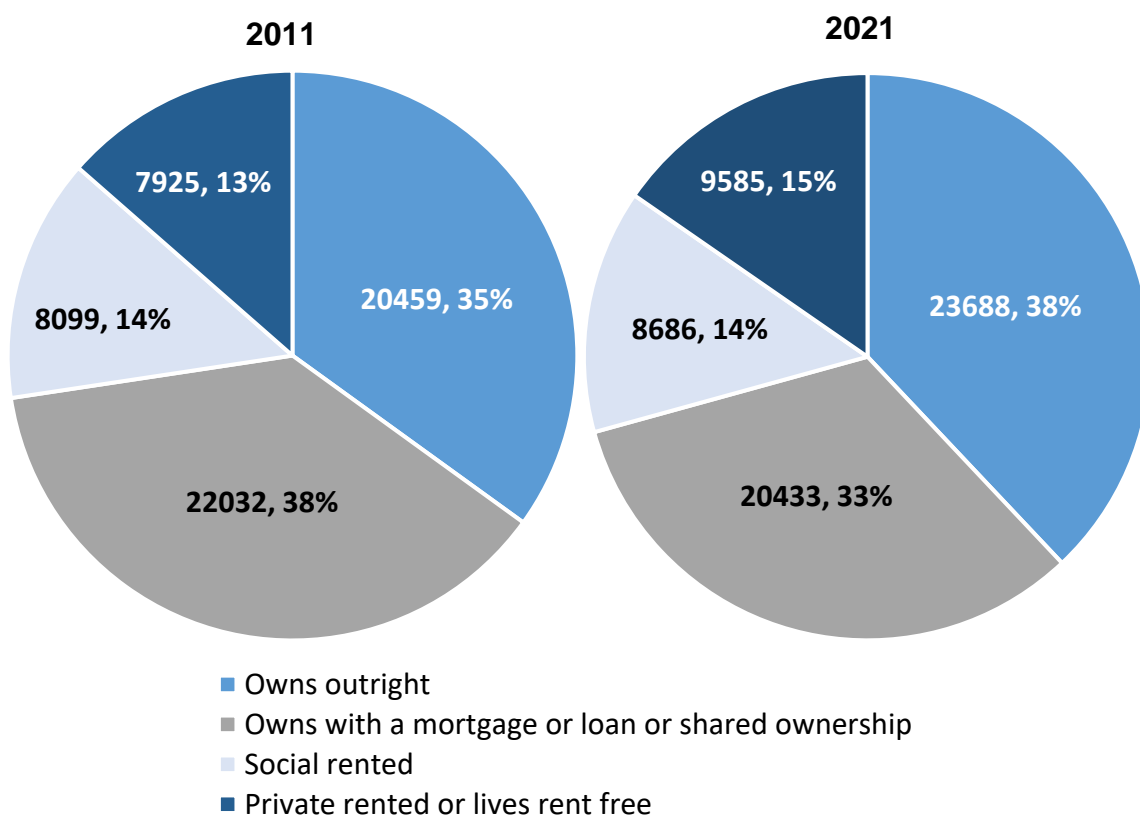
- 3.1.47 Evidently, long-term empty homes are present in all markets, although to differing degrees. Bridgend and Surrounding contains the highest number of private empty homes in absolute terms (nearly 300), although this is to be expected with it being the largest settlement. Bridgend actually has one of the lowest percentages (1.45%) of private empty homes compared to all private homes within any HMA.
- 3.1.48 The three Valleys HMAs contain high proportions of private long-term empty homes, ranging from 2.3% of all private homes in the Ogmore Valley to 2.9% in the Llynfi Valley. As aforementioned, these areas are dominated by lower priced terraced housing and the proportion of empty homes is likely to be a broader reflection of too many similar property types in one geographical radius, compounded by low market values and therefore little financial incentive to invest. Equally, there is a mismatch between the principal dwelling types (i.e. larger, three bedroom homes) and the demographic make-up of newly forming households (i.e. smaller households, notably single people and couples without children). Market choice is therefore limited and there is a dearth of smaller properties in such areas, thereby further contributing to the lack of demand for larger homes.
- 3.1.49 Porthcawl also contains a high number of long-term private empty homes (nearly 200), which equates to 2.6% of all private homes. Previous analysis has demonstrated that Porthcawl exhibits some of the highest house prices and private rents in the whole county borough. It is therefore likely to conclude that homes remain empty in this area for reasons other than low demand (i.e. affordability, inheritance, sentimentality), which can render it difficult to return such properties to occupation. The same rationale applies to other mid-market areas that exhibit smaller proportions of private long-term empty homes.
- 3.1.50 Figure 18b also shows that there are few long-term empty homes within the social rented sector *per se*, with overall numbers in single figures across most HMAs. The one notable exception is the Ogmore Valley, which contained over 30 long-term empty social rented homes; 9% of the total social rented homes in the vicinity. However, these largely stem from one particular set of apartment blocks, which are classed as strategic voids. Letting allocations made from these dwellings do not form part of the turnover calculation within this LHMA as they no longer contribute to housing supply within the locality.
- 3.1.51 The Council is committed to tackling the blight of empty properties and adopts a proactive approach by working with owners to bring their empty properties back into use as detailed within the Empty Property Strategy (2019-23). In addition to using legislative powers including enforcement action, the Council provides owners with help and assistance to bring empty properties back into use, including empty homes grants and empty property loans.

3.2 Socio-Economic and Demographic Trends

Household Trend Analysis by Tenure

- 3.2.1 As aforementioned, owner occupation remains the predominant tenure in the local authority area. An additional 1,630 households stated that they owned their own home in 2021 compared to 2011, although this encompassed 3,229 additional 'outright' homeowners and 1,599 fewer households owning their properties with a mortgage or loan. While there has been reported growth in this sector overall, Figure 19 shows that both forms of home ownership combined reduced proportionately from 73% of all households in 2011 to 71% in 2021.

Figure 19: Tenure Indicated by Households, Bridgend County Borough



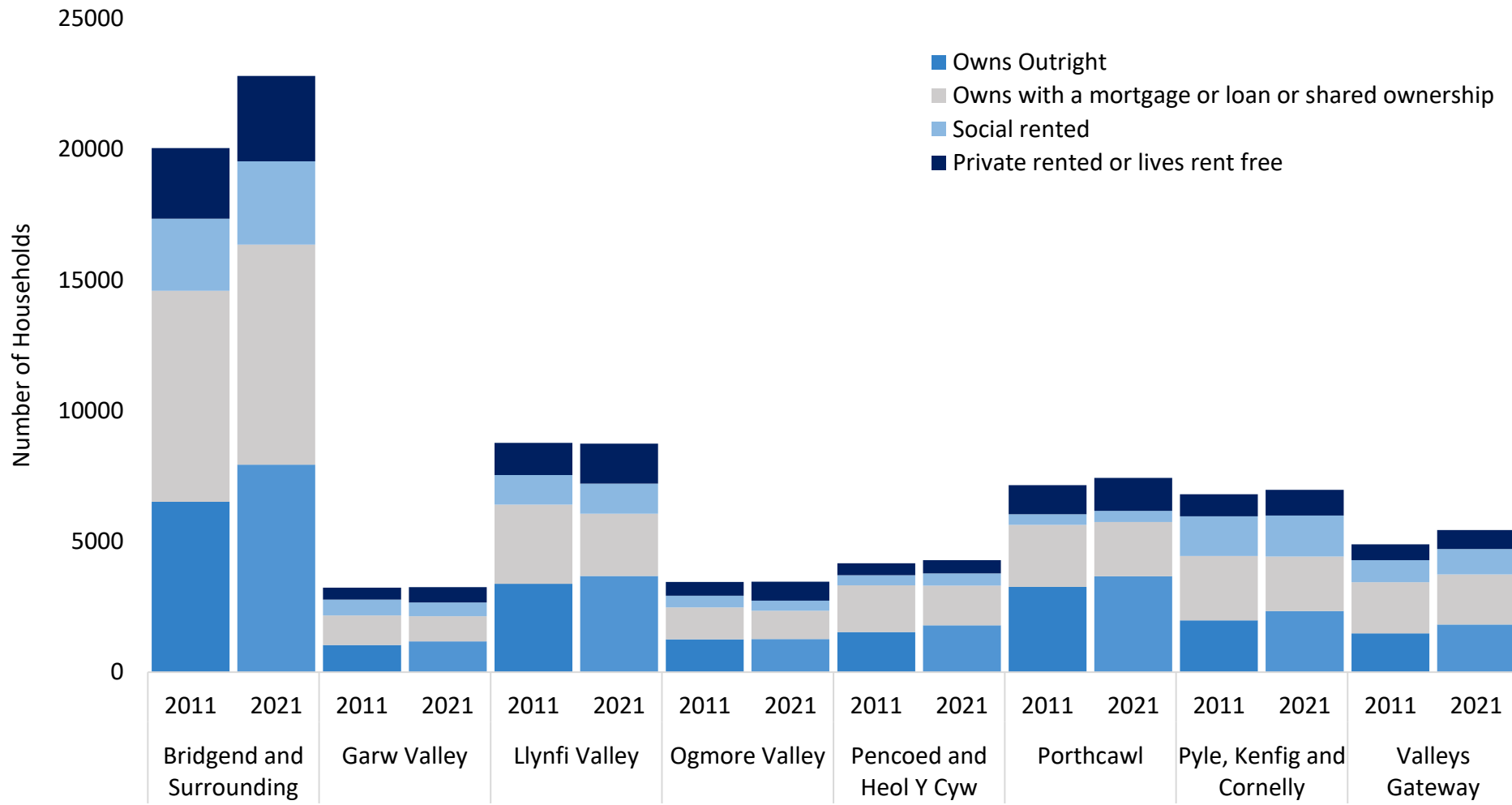
Data Source: 2011 and 2021 Census

- 3.2.2 Recent history has documented a significant change in the proportion of households reportedly living in the private rented sector (or rent free). This nearly doubled from 4,522 or 8% of all households in 2001 to 7,925 or 13% of all households in 2011. However, the change in households renting privately was not so pronounced from 2011 to 2021 as Figure 19 clearly demonstrates. There has nevertheless still been some growth in households reportedly renting privately,

with the number increasing in absolute (+1,660 households) and relative terms (13% of all households in 2011 compared to 15% in 2021). Indeed, with high property prices, large mortgage deposit requirements, the cost of living crisis and the lasting impacts of welfare reform, a growing proportion of households are likely to be renting in the local private sector for the foreseeable future. This tenure is now clearly a substantial component of the local housing market overall.

- 3.2.3 The number of households reporting that they resided in the social rented sector grew less significantly, by 587 households from 2011 to 2021, meaning the overall proportion of households renting from social landlords remained at 14%. In relative terms, the social rented sector was (marginally) the smallest sector in the overall housing market in 2021, albeit still broadly comparable in size to the private rented sector.
- 3.2.4 It is also important to understand how these changes have occurred at HMA level. Figure 20 overleaf provides a more detailed geographic breakdown of tenure change from 2011 to 2021. The change in households reporting that they owned their home outright increased in all HMAs, by 1% in the Ogmore Valley to 23% in the Valleys Gateway, although most HMAs typically witnessed a 14% increase in outright home ownership. Conversely, the proportion of households stating that they owned their homes with a mortgage or loan decreased in all areas (typically by 13%) apart from Bridgend, which saw a 4% increase. This could be most attributable to the new major housing development nearing completion at Parc Derwen, Bridgend at this time.
- 3.2.5 The change in households stating they rented in the social sector was somewhat more divergent at HMA level. The most significant proportionate changes were evident in Pencoed and Heol Y Cyw (+21%), Bridgend and Surrounding (+15%) and the Valleys Gateway (+15%), whereas there were notable declines in the Ogmore Valley (-14%) and Garw Valley (-12%). However, the percentage of households reporting that they rented privately increased in every HMA, by 13% in Pencoed and Heol Y Cyw to a significant 40% in the Ogmore Valley. As aforementioned, private rental and social rental values are often interchangeable in Valleys HMAs and this dataset suggests there has been significant migration between these two tenures in the Ogmore Valley and Garw Valleys particularly.

Figure 20: Tenure Indicated by Households, HMA

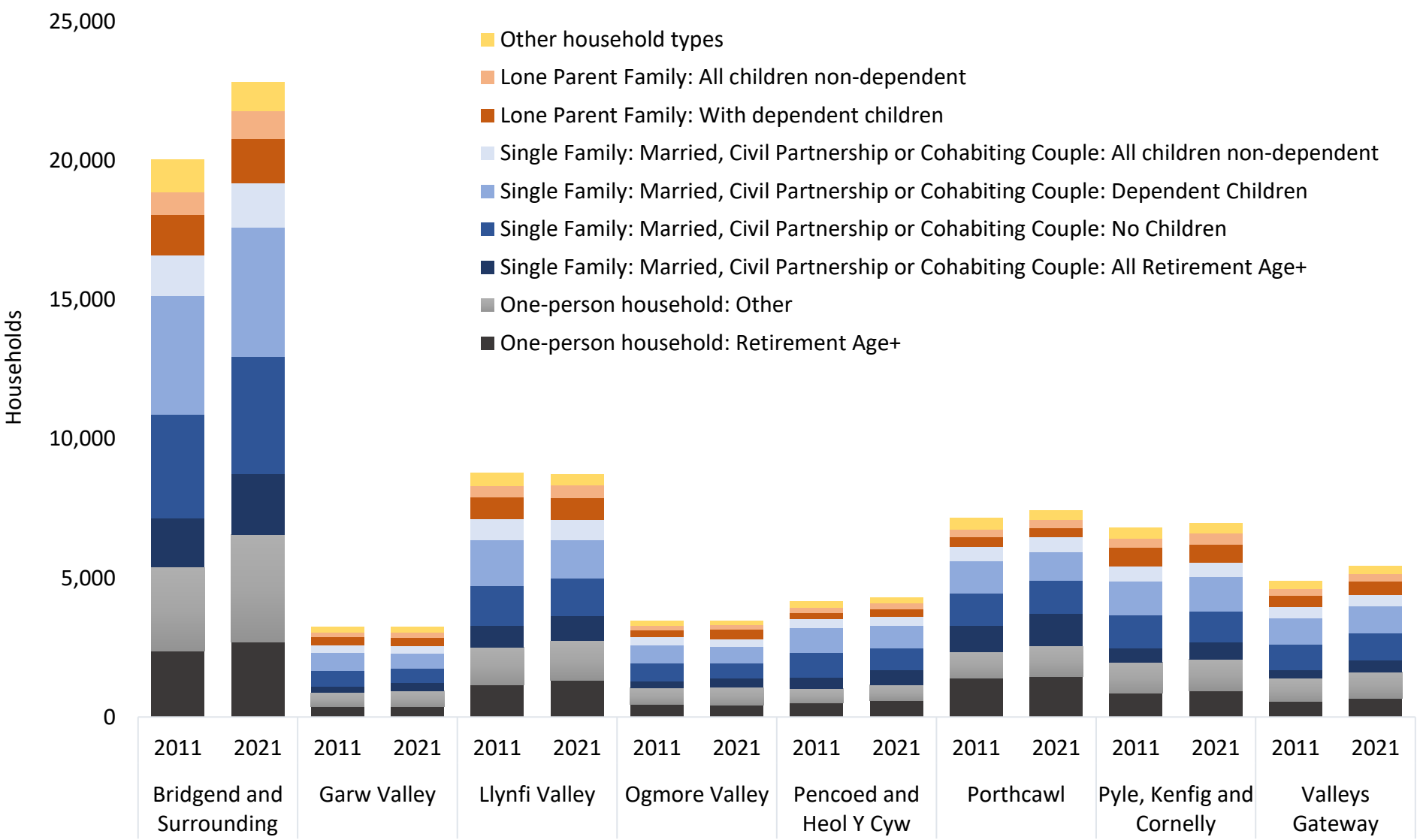


Data Source: 2011 and 2021 Census

Household Composition

- 3.2.6 Census datasets also classify households by the relationships between household members (household composition). Figure 21 illustrates the changing dynamics between household members from 2011 to 2021 at HMA level. Overall, the largest change was in single family couples of retirement age (an increase of 25% at county borough level). This change was significant in every HMA, reflective of the naturally ageing population, although most notably in the Valleys Gateway (+36%), Pencoed and Heol Y Cyw (+32%) and Pyle, Kenfig and Cornelly (+28%).
- 3.2.7 Lone parent families with non-dependent children also increased significantly over this period (by 23% at county borough level), notably in Pyle, Kenfig and Cornelly (+30%), Bridgend and Surrounding (+25%) and Pencoed and Heol Y Cyw (+25%). This is likely to be reflective of young adults remaining in the parental home for longer, which is often attributed to affordability issues, the need to save for a deposit and/or changing relationships between parents and children compared to previous generations. There is a close relationship between these HMAs and the designated Sustainable Growth Areas within the RLDP. The Plan seeks to increase the supply of housing within sustainable locations within these HMAs and enable the needs of such prospective newly forming households to be met over the RLDP period (2018-2033).
- 3.2.8 The increased prevalence of single person households is also illustrated by Figure 21, both including people of retirement age (+11% at county borough level from 2011 to 2021) and non-retirement age (+15%, respectively). Bridgend and Surrounding witnessed a particularly significant increase (+28%) in the proportion of non-retirement age single person households. This can be considered a dual reflection of societal trends (i.e. later marriages and increased prevalence of divorce / separation) coupled with the characteristics of Bridgend itself (i.e. the notable concentrations of services and facilities, employment opportunities and high accessibility to other parts of the regions).

Figure 21: Household Composition, HMA



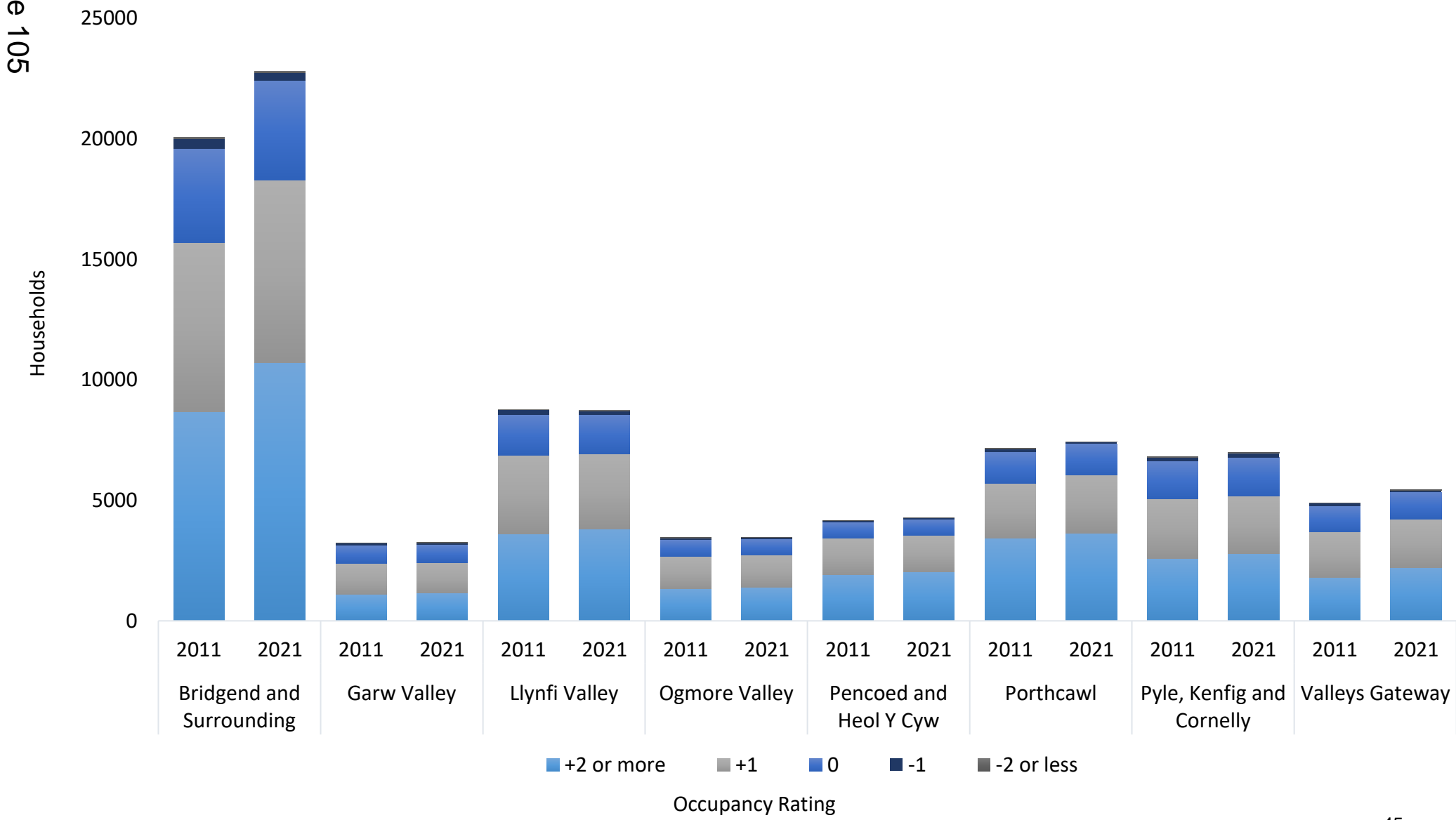
Data Source: 2011 and 2021 Census
(NB. A retirement age of 65 was derived from the 2011 Census and a retirement age of 66 was derived from the 2021 Census)

Occupancy Ratings (Bedrooms)

- 3.2.9 In order to understand how far overcrowding is an issue within each HMA, Census datasets on occupancy ratings have been analysed to determine the level of over, under or 'ideal' occupation. This Census dataset includes a measure of occupancy based on the number of bedrooms in a household's accommodation compared to the ages of the household members and their relationships to each other⁴. The outputs have been grouped by HMA and illustrated within Figure 22.
- 3.2.10 The most common category was households with 2 or more bedrooms than required and this increased in every single HMA from 2011 to 2021. Overall levels of under occupation within this category were most notable within Porthcawl (48% of households in 2011 compared to 49% of households in 2021), which is likely a reflection of the high proportion of older person households that own their home outright. However, by 2021, over 40% of households within almost every other HMA were deemed to have 2 or more bedrooms than required; the only exception being the Garw Valley, at 36%.
- 3.2.11 Households with 1 more bedroom than required was the second most common category. While the proportion of such households did not increase as uniformly from 2011 to 2021, percentages still remained significant by 2021. Indeed, approximately 36% of households within most HMAs were deemed to contain a spare bedroom on average. Similar trends were also apparent for those households deemed to have an 'ideal' number of bedrooms and this typically accounted for 20% of all households within each HMA by 2021.
- 3.2.12 Over occupation does not therefore appear to be a significant issue in relative terms based on this dataset. Households deemed to have one fewer bedroom than required typically comprised a very small proportion of households within each HMA (1-3%). This situation either stayed broadly comparable or slightly improved from 2011 to 2021 (proportionately). Households over occupying by 2 or more bedrooms were deemed to be even fewer in number and proportion. Caution does have to be exercised when analysing this dataset as it was collected during the pandemic (i.e. when some households may have 'doubled up' for care reasons). However, trends do not suggest the scale of the issue has changed significantly from 2011 to 2021. The number of households over-occupying remain small, although persistent, and this issue is most likely to affect those on the margins of affordability. This could worsen in the short-term with the cost-of-living crisis and requires careful monitoring as part of future LHMA updates.

⁴ An occupancy rating of: * -1 or less: implies a household's accommodation has fewer bedrooms than required (overcrowded) * +1 or more: implies a household's accommodation has more bedrooms than required (under-occupied) * 0: suggests a household's accommodation has an ideal number of bedrooms

Figure 22: Occupancy Rating (Bedrooms), HMA

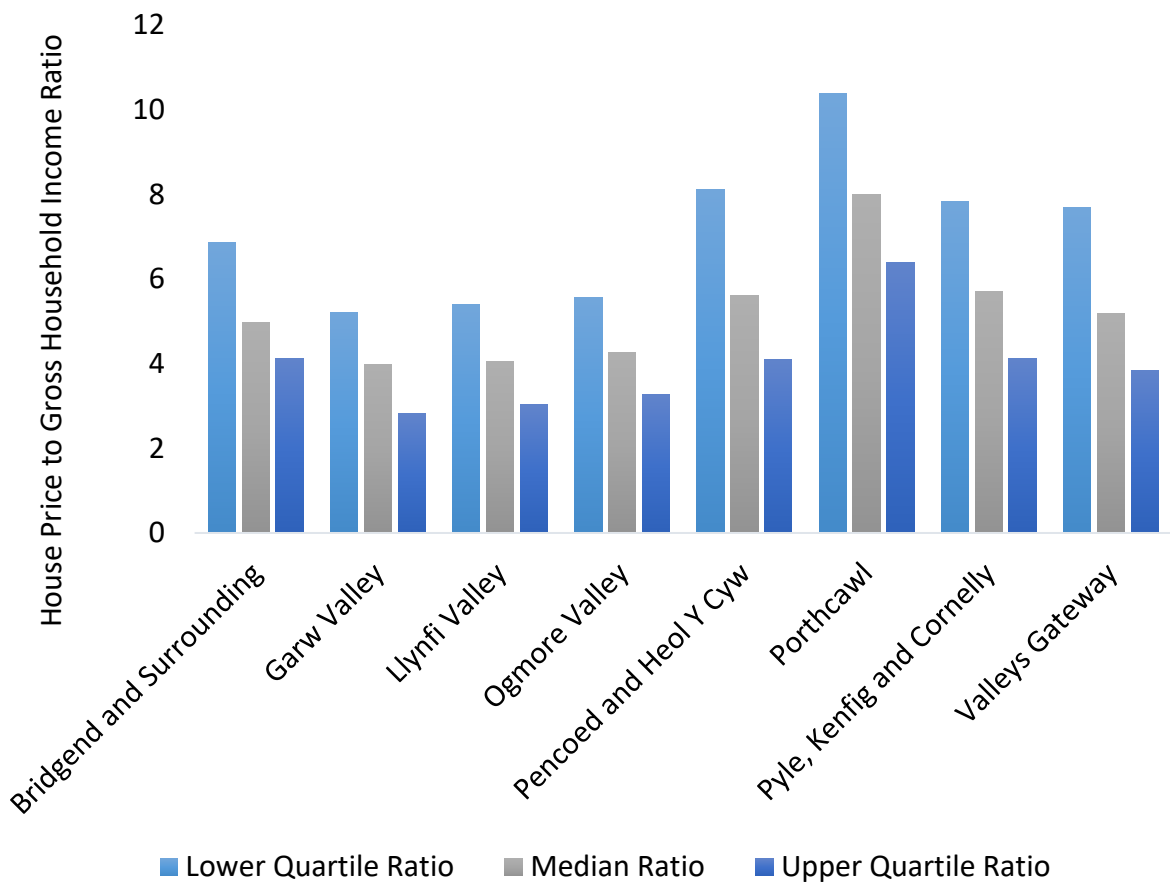


Data Source: 2011 and 2021 Census

Household Income and Housing Costs (House Price to Gross Income Ratios)

- 3.2.13 Household income data is relatively scarce at smaller geographies, although crucial to the production of a robust LHMA. In absence of open data, CACI Paycheck (2023) data has therefore been procured to address this data gap and to provide gross household income estimates from all sources including earnings, benefits and investments. This represents a snapshot at a point in time rather than a trend-based assessment of gross household income. Equally, while robust data on housing costs is also unavailable at smaller geographies, Price Paid data can be utilised to provide an overview of the outright cost of purchasing properties in different HMAs⁵.
- 3.2.14 Analysing both data sources in tandem has enabled house price to gross household income ratios to be calculated for each HMA, which provides a helpful gauge of affordability and how it varies across the county borough. Analysis has been conducted on the lower quartile, median and upper quartile house prices and gross household incomes to provide the affordability ratios illustrated in Figure 23.

Figure 23: House Price to Gross Household Income Ratios



Data Source: Adapted from Land Registry Price Paid Data and CACI Paycheck Data

⁵ CACI Paycheck has been sourced at MSOA level and aggregated up to HMA level

- 3.2.15 Original (2006) LHMA guidance suggested that a household is likely to be able to afford to purchase a home costing 3.5 times its gross income and this ratio has indeed be used as a longstanding benchmark in LHMA's. More recent data from UK finance has shown that the 2022 first time buyer property value to income ratio for Bridgend County Borough is 4.31, which represents an increase from the 2021 figure of 4.10. It is recognised that lenders conduct sophisticated assessments of potential borrowers in the current market. This will include analysis of income expenditure, family makeup, lifestyle and job security when assessing a borrower's likelihood of being able to meet mortgage repayments. However, these complex assessments cannot be replicated in a study of this type. Therefore, the 4.31 affordability ratio provides a pragmatic benchmark to estimate market affordability and helps to provide context to the ratios illustrated within Figure 23.
- 3.2.16 There are undoubtedly disparities between HMAs in terms of affordability at all quartiles. There are three distinct affordability bands when considering lower quartile house price to lower quartile gross household income ratios; 5 in the Valleys HMAs, 7-8 in the mid-market areas⁶ and over 10 in Porthcawl. This broadly reflects the aforementioned house price analysis, although the level at which lower quartile house prices outstrip lower quartile incomes is significant even in the most affordable HMAs. Home ownership is likely to be out of reach for most lower quartile income households in most HMAs in the absence of significant deposits.
- 3.2.17 Median house price to median gross household income ratios are undoubtedly lower in each HMA. However, Valleys HMAs exhibit affordability ratios of 4, mid-market areas exhibit ratios of 5-6 and median house prices outstrip median gross household incomes by 8 times in Porthcawl. While median household incomes are higher in more expensive HMAs, they are not high enough to offset the respective premiums on house prices. Moreover, it is unlikely that a typical first-time buyer's household income will be akin to the median income for any given HMA. Home ownership (at median prices) may therefore be unachievable for many first-time buyers unless lower quartile priced houses are pursued, significant deposits are available and/or buyers consider properties in areas where affordability ratios are lowest (i.e. the Valleys HMAs). The potential to introduce intermediate affordable housing therefore appears to be most significant in the mid-market areas and Porthcawl, as assessed further via the housing need calculation. However, there will invariably be 'hot spots', which are best analysed at site level using specific prices and values.
- 3.2.18 There is less of a disparity between affordability ratios at the upper quartile, although the three notable bands remain. Upper quartile house prices to upper quartile gross household income ratios range from 3 in the Valleys HMAs to 4 in the mid-market HMAs to over 6 in Porthcawl. Therefore, while upper quartile

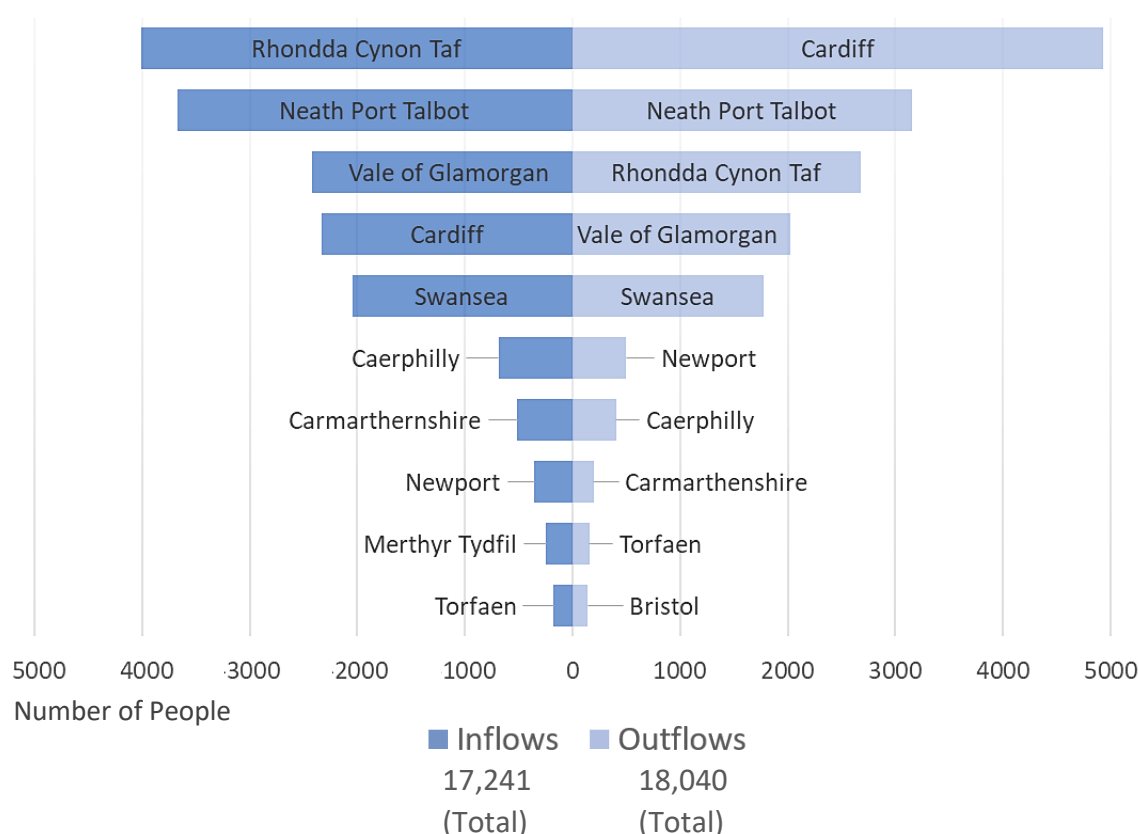
⁶ Bridgend and Surrounding, Pencoed and Heol Y Cyw, Pyle Kenfig and Cornelly and the Valleys Gateway.

income households should typically be able to afford upper quartile properties in most HMAs, Porthcawl house prices still notably outstrip household incomes by a much greater degree at the top end of the market. This once again illustrates the affordability disparity across Bridgend County Borough's HMAs.

Commuting Patterns

- 3.2.19 Due to its location on the M4 corridor, access to the mainline railway to London and significant employment provision, Bridgend County Borough is a popular area to both live and work in. The 2011 Census found a fairly even balance between the number of people who commuted into Bridgend for work and the number of residents who worked elsewhere, resulting in a net flow calculation of -799 people (Figure 24).

Figure 24: Commuting Patterns, Bridgend County Borough, 2011



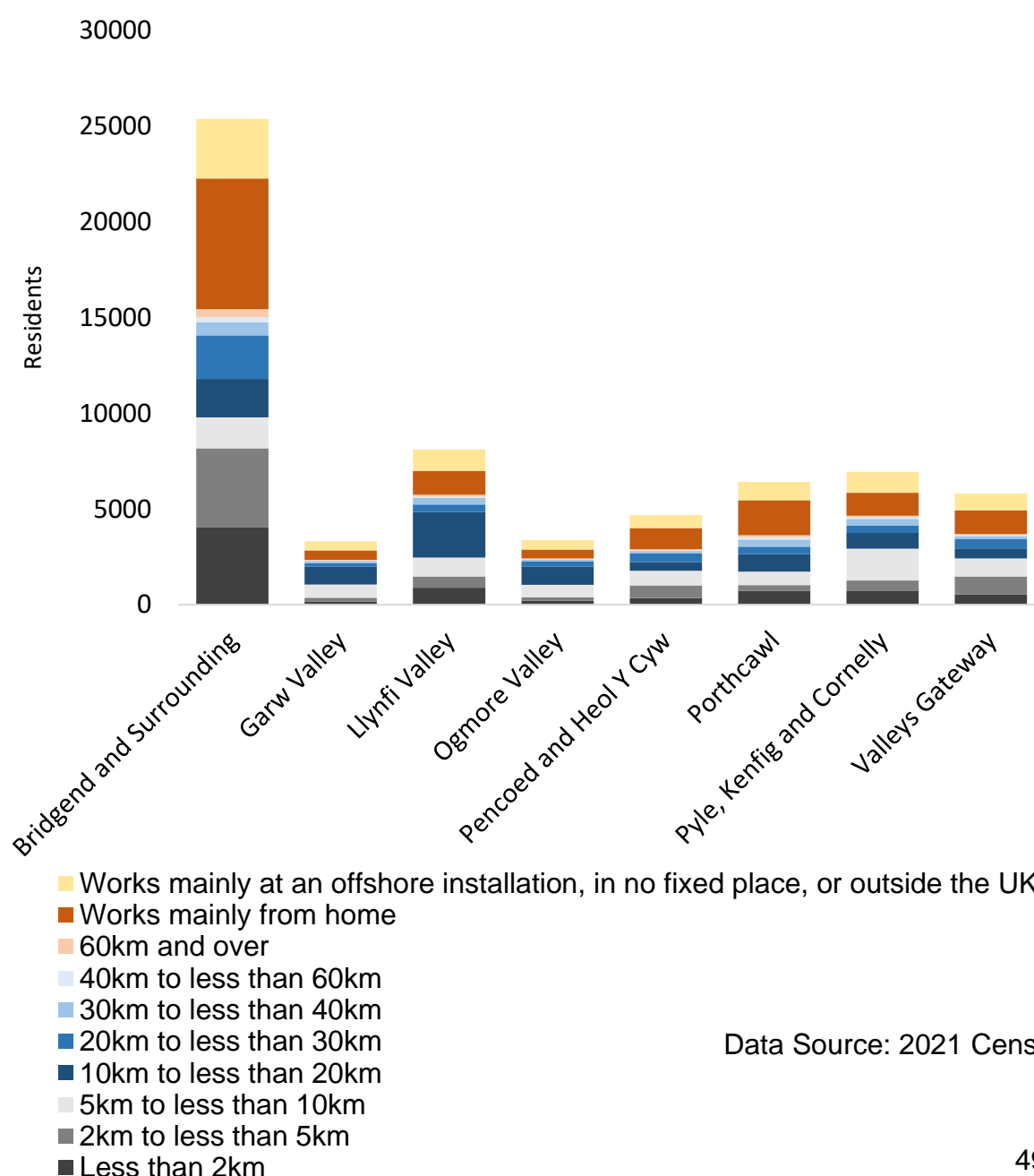
Data Source: 2011 Census

- 3.2.20 Cardiff was the most common workplace based out commuting destination for Bridgend residents in 2011, and this was likely to be due to Cardiff workers taking advantage of Bridgend's more affordable property prices and strong transport links. Equally, 4,000 workers commuted into Bridgend County Borough from neighbouring Rhondda Cynon Taf given the overlapping employment and housing markets. However, around a third of people both lived and worked in the Bridgend

County Borough in 2011, underlying its importance as a major, relatively self-contained employment area.

- 3.2.21 As the 2021 Census took place during the pandemic, it captured a snapshot of rapidly changing travel to work patterns and was significantly influenced by workers on furlough and those temporarily working from home full-time. Comparisons with the 2011 dataset should not therefore be made for these reasons and ONS cautions against using the 2021 data for planning purposes. Moreover, the legacy of homeworking is still in a process of flux for many occupations and longer-term travel to work patterns will take time to adjust accordingly. This LHMA does not therefore seek to make comparisons between 2011 and 2021 work flow and travel to work data.

Figure 25: Commuting Distances, Bridgend County Borough, 2021

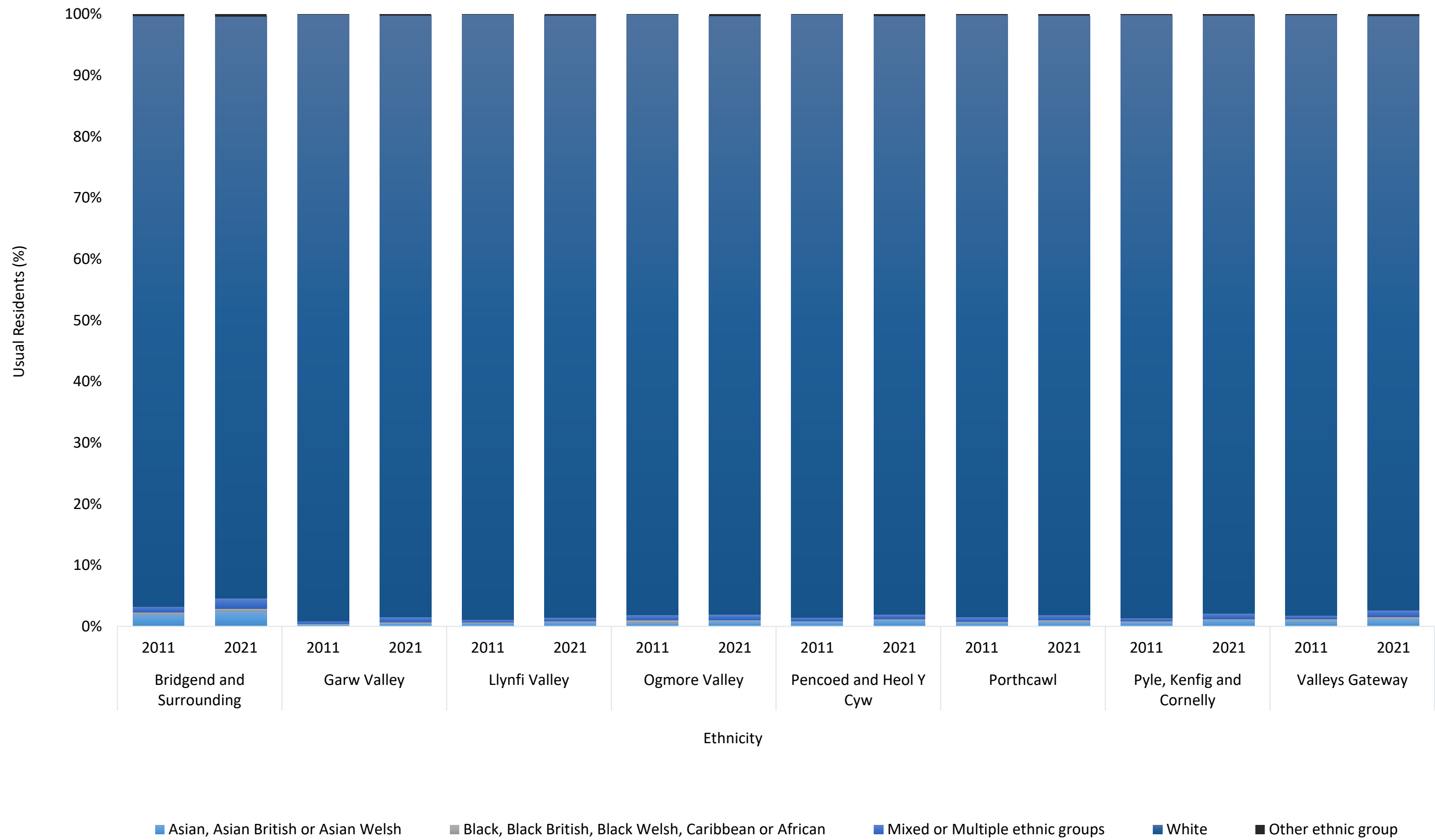


- 3.2.22 Nevertheless, and for completeness, Figure 25 illustrates the distance travelled to work captured by the 2021 Census. At county borough level, 23% of households stated they worked from home in 2021, although this varied from 14% of residents in the Ogmore Valley to 30% of residents within Bridgend and Surrounding. Bridgend also reported the highest proportion of workers travelling less than 2km (16%) and 2km to less than 5km (16%) to their place of employment. This is unsurprising as Bridgend is the largest HMA, with significant employers that would have still necessarily had to conduct face-to-face operations during the pandemic (i.e. the hospital, prison and essential services). The availability of such services and facilities within close proximity to homes is one of the key reasons why Bridgend is the primary focus of sustainable growth within the RLDP, with the aim of continuing to promote sustainable patterns of movement within the settlement.
- 3.2.23 Other HMAs contained a higher proportion of residents commuting from 5km to less than 10km, although percentages of residents commuting 20km or more were notably less common. However, it would be tenuous to place too much emphasis on this dataset as it is one of the most sensitive to the pandemic-related conditions during which it was collected.

Population - Ethnicity (Trends)

- 3.2.24 Further to the previous analysis on self-ascribed ethnic group, Figure 26 provides a trend-based overview to show the proportionate change across each HMA from 2011 to 2021. A direct detailed comparison between the 2011 and 2021 Census ethnicity datasets is not possible as the ethnic group categories are not identical and some changes were made in 2021. However, Figure 26 utilises the wider ethnicity groupings to enable a high-level comparative analysis over the decade.
- 3.2.25 While there was not a particularly notable change in self-ascribed ethnic group within any one HMA, the proportion of residents that described themselves as White decreased in every HMA, from -0.31% in the Ogmore Valley to -1.40% in Bridgend and Surrounding. There was a corresponding increase in other self-ascribed ethnic groups in most HMAs. The proportion of residents describing themselves as Asian, Asian British or Asian Welsh typically increased by 0.3% in all HMAs, with Bridgend recording the highest change in this ethnic group (+0.48%). Similarly, the proportion of residents describing themselves as Mixed or Multiple Ethnic Groups increased in every HMA, from +0.07% in Pencoed and Heol y Cyw to +0.7% in Bridgend and Surrounding.
- 3.2.26 These two datasets would therefore appear to indicate that the county borough has become slightly more diverse from 2011 to 2021, with Bridgend and Surrounding accounting for the majority of the change. These trends, particularly in relation to any corresponding impacts on housing need, will be duly monitored as part of future LHMA updates.

Figure 26: Ethnic Group by HMA (Percentage), 2011 and 2021

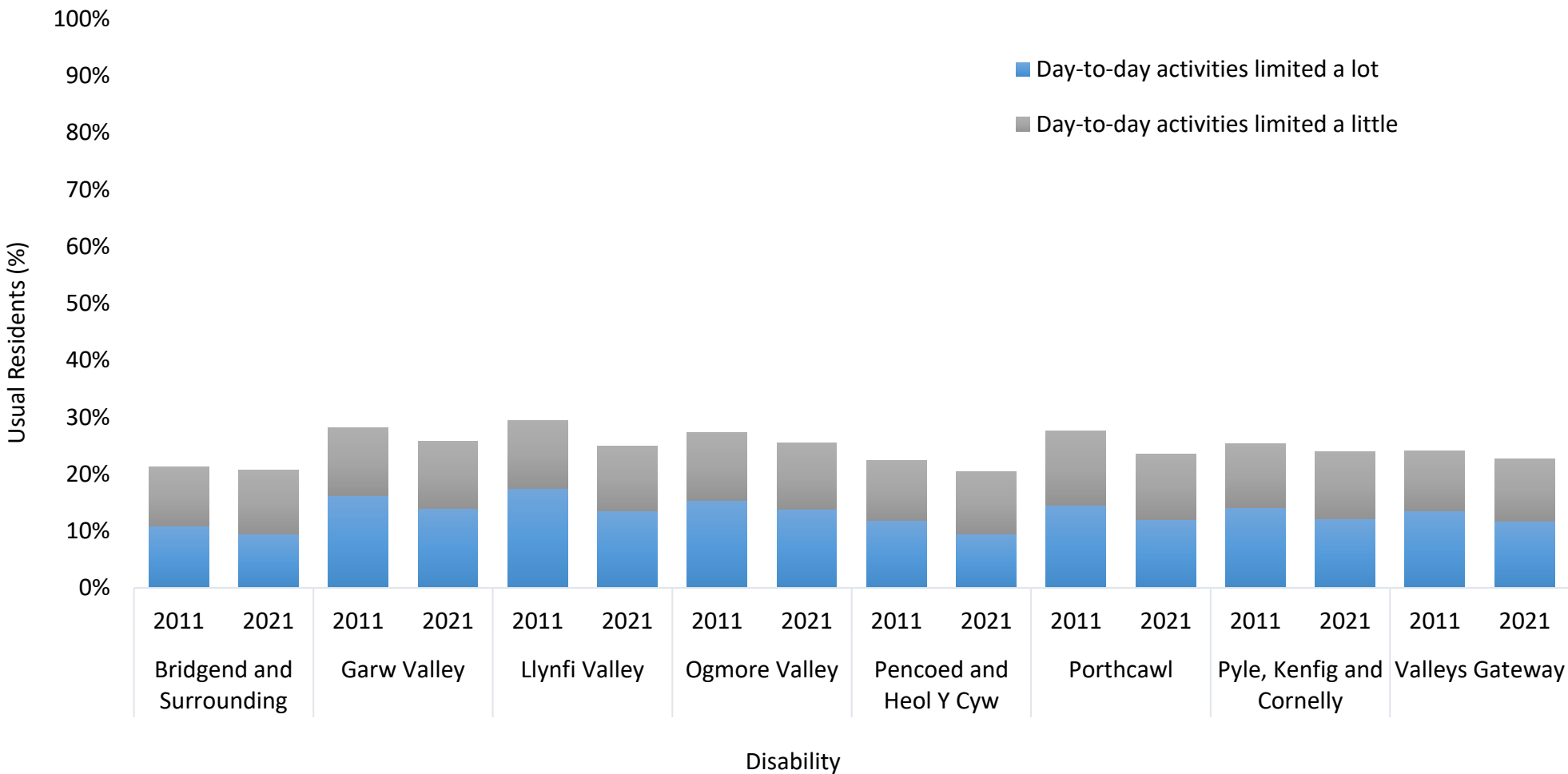


Data Source: 2011 and 2021 Census

Population - Disability (Trends)

- 3.2.27 Assessing trends in relation to disability is made difficult by the fact that the 2021 Census utilised slightly different definitions and categories to the 2011 Census. However, there are two comparable categories from each dataset; namely whether residents considered that their condition limited their daily activities 'a lot' or 'a little'. As this was a personal response based on each resident's own interpretation, it is considered appropriate for comparison. Proportions have been utilised within Figure 27 to enable a more equitable analysis.
- 3.2.28 Figure 27 does not show a significant change in the proportion of the usual resident population that stated they had a long-term health problem or disability that limits a person's day-to-day activities. There was actually a slight proportionate reduction across each HMA (by just over 2% on average) from 2011 to 2021 in those that stated their daily activities were limited 'a lot' by such a health condition.
- 3.2.29 Conversely, the proportion of usual residents that stated their daily activities were limited 'a little' by such a health condition fluctuated from +0.9% in Bridgend and Surrounding to -1.6% in Porthcawl over the same period. While, again, there was little change over the course of the two Census counts, the issue appeared to slightly improve in some HMAs and slightly worsen in others.
- 3.2.30 However, this is ultimately a subjective response and does not provide any indication as to whether there are any housing related needs as a result of each respondent's health condition. This can only be properly identified through a detailed housing application. These trends do nevertheless provide an indication that a persistent proportion of Bridgend County Borough's population find their daily activities are limited and the issue is similar in scale across all HMAs.

Figure 27: Disability by HMA (Percentage), 2011 and 2021



Data Source: 2011 and 2021 Census

3.3 Specific Housing Needs Requirements

- 3.3.1 Unlike the housing need calculation undertaken as part of this LHMA, this section is largely a qualitative overview of policies, strategies and data sources for specific housing related needs; drawing significantly on working knowledge from housing services. Some of the areas identified below are not considered pressing key issues within the county borough (i.e. student accommodation), whereas others are already pressing concerns set to intensify (notably temporary accommodation). This section is not intended to provide a quantitative assessment of properties needed for each category, rather an overview of current working pressures as a signpost to enhance strategic direction at the local level.

a) Accessible and adapted housing provision

Local policies/ strategies	Homelessness Strategy, Statement of Need, Housing Support Grant (“HSG”) Programme Strategy, Disabled Facilities Grant (“DFG”) Framework and Minor Works (adaptations), Housing Prospectus.
Property needs	Adaptations to existing stock (i.e. wet room, ground floor toilet or bedroom, ramped or level access to property) together with additional wheelchair accessible homes.
Suitable for	Households with limited mobility and/or dexterity, need for adaptations, wheelchair users.
Evidence including data sources	<ol style="list-style-type: none">1. The current level of need (analytics)2. Future demand forecasts3. Stock data
External stakeholder consultation and engagement	Consultation includes a Housing Support Provider Forum and ongoing attendance at multi-agency meetings including Community Safety Partnership, MAPPA, MARAC, Regional Collaborative Groups.
Key Issues identified	Shortage of wheelchair accessible properties and need to adapt existing properties to meet the needs of older and disabled people.

b) Multi-generational and/or larger families requiring larger properties

Property needs	Larger properties – particularly for large families and multi-generational households.
Suitable for	Large families of different compositions.
Evidence including data sources	1) Stock data and affordable housing return (planned) 2) Future type and level of needs and provision required
External stakeholder consultation and engagement	RSLs were asked to provide information about their housing stock, including type, and size. This showed there were few larger properties across the county borough and these are known to turnover infrequently. Housing need evidence within this LHMA identifies a small, yet persistent need for larger family homes.
Key Issues identified	Limited availability of larger properties and low turnover of existing stock.

c) Non-permanent housing

Local policies/ strategies	Homelessness Strategy. Rapid Rehousing Transitional Plan. Housing Support Grant Annual Delivery Plan.
Property needs	Good quality temporary accommodation
Suitable for	Homeless households (permanent housing is the preferred choice but good quality temporary housing is considered where there is insufficient permanent housing to meet needs, or in an emergency).
Evidence including data sources	1) Current accommodation placements from datasets 2) Forecasting future type, level of needs, and availability.
External stakeholder consultation and engagement	Hafod, POBL, The Wallich, V2C, Llamau, United Welsh. Weekly meetings take place to consider how to make better use of available accommodation, procure emergency beds (e.g., PODS, Ty Ogwr) and utilise the private rented sector when necessary.
Key Issues identified	Dramatic increase in the need for temporary accommodation compounded by a shortfall in supply.

d) Housing, care and support needs

Local policies/ strategies	Homelessness Strategy, Statement of Need, Housing Support Grant Programme Strategy and Spend Plan, Disabled Facilities Grant Framework and Minor Works (adaptations).
Property needs	Floating support, housing related support services, extra care, supported housing, rapid rehousing, learning disabilities, mental health, temporary supported accommodation.
Suitable for	Temporary and permanent supported housing, homelessness, young people, vulnerable individuals, substance misuse, learning difficulties, mental health, domestic abuse.
Evidence including data sources	<ol style="list-style-type: none">1) The current level of needs from internal datasets.2) Current provision, stock levels and spending commitments3) Census data
External stakeholder consultation and engagement	Multi-agency housing strategy delivery group, corporate and directorate business plans, RSLs, local support providers
Key Issues identified	Align housing support services for the key groups noted above alongside the need for temporary accommodation to enable effective 'move on' to permanent accommodation.

e) Locational needs for student accommodation

Property needs	No identified need.
Suitable for	N/A
Evidence including data sources	None - Census data not specific enough to identify university students. Housing register datasets has minimal household information on education type.

External stakeholder consultation and engagement

N/A

Key Issues Identified

Bridgend does not have a university or a large (higher education) student population requiring accommodation assistance.

f) Locational needs for people with physical or cultural needs

Local policies/ strategies

Social housing allocations policy

Property needs

The policy values the significance of offering applicants as much choice as possible regarding their rehousing options, both to recognise their individual wishes and needs and to build sustainable communities where people choose to live.

Suitable for

Religious or social spiritual practice, healthcare, relationships and community connections, emotional support.

Evidence including data sources

- 1) The current type of housing requested, the areas chosen and the reason for those options.
- 2) Planned and delivered housing units – including general needs, purchases, sheltered and extra care units.
- 3) Affordable housing returns – including new-build, purchase, conversions, and leasing.
- 4) Internal datasets

External stakeholder consultation and engagement

Local social landlords, housing applicants, tenants, other Council departments and services.

Key Issues identified

Data is often limited to why households refuse an offer or housing.

4. Range of Additional Housing Need Estimates

4.1 Data Inputs and Key Assumptions

4.1.1 This section of the LHMA provides the completed summary tables from the LHMA tool to illustrate the calculated housing need estimates for Bridgend County Borough. There are four sets of estimates, based on the three varying Welsh Government household projections (principal, higher and lower) and the RLDP projection (extended over the LHMA period). For each set of estimates, there are four summary tables, as follows:

- First table: Estimated annual additional affordable housing need by HMA and tenure, net of planned supply and turnover of existing stock, over the first five years of the LHMA period.
- Second table: Estimated annual additional total housing need by HMA and tenure, gross need before any allowance for planned supply and turnover of existing stock, over the first five years of the LHMA period.
- Third table: Estimated annual additional total housing need by HMA and tenure over the remaining 10 years of the LHMA period. No allowance has been made for any planned supply and turnover of existing stock beyond year five as it becomes less accurate to predict.
- Fourth table: Estimated annual and total additional affordable housing need by HMA and tenure over the 15-year period of the LHMA. These estimates are a combination of those estimates from the first and third tables.

4.1.2 Table 4 below provides an overview of the data inputs and key assumptions used to calculate the housing need estimates. These are predominantly default inputs and assumptions as outlined in Welsh Government guidance, although some necessary deviations have been made as outlined below.

Table 4: Key Data Inputs and Assumptions (Housing Need Estimates)

Key Data Inputs	Key Issues
1. HMAs	<p>HMAs have been robustly defined using MSOAs in accordance with Welsh Government Guidance. The same HMAs have been retained from the 2021 LHMA, which represents a necessary degree of continuity. The Viability Stakeholder Group also unanimously agreed that these HMAs are most appropriate to test development viability across the county borough, enabling synergies with wider policy development on housing need, viability and growth strategies.</p>
2. Household data	<p>All three Welsh Government Variant Household Projections have been utilised along with the projection used to underpin the RLDP for consistency (extended to cover the whole LHMA period). Growth percentages have been apportioned to HMAs based on existing commitments (schemes with planning consent) and proposed RLDP allocations. Household sizes have been apportioned to bedroom sizes based on the social rent allocation policy. This approach follows Welsh Government Guidance.</p>
3. Rent data	<p>Rent Office Wales data has been utilised to arrive at percentile rents. In four HMAs, Rent Office Wales sample sizes were too small to generate robust averages for four bedroom properties. Where necessary, samples have been bolstered with local private rent data held by the Council (sourced from Common Housing Register applications); comparable in that such records are also 'achieved' rents. This has overcome the issue and enabled percentiles to be generated across all property sizes in all HMAs.</p> <p>Limitations with using Rent Office Wales data are recognised and detailed within this LHMA. Resultant percentiles are considered a lower estimate of the true cost of <u>entering</u> the private</p>

rented sector, while acknowledging data available on private rents is limited and there are pros and cons to using alternative data sources.

4. Income data

CACI Paycheck data has been procured at MSOA level to enable income distribution analysis across the HMAs. This is considered the most robust household income distribution data available at sub-local authority level in absence of open data.

5. House price paid data

Land Registry Price Paid Data has been utilised to enable median and alternative percentile house prices to be generated across the HMAs. As this dataset is based on the actual price paid for properties, it is not fettered by valuations and considered the most robust source of data on house prices. The median price has been used to avoid atypical sales values (at the extremities) unduly affecting the average prices.

6. Existing unmet need

Common Housing Register data has been provided by the Council's Housing Solutions Team and duly scrutinised to arrive at a robust backlog of existing unmet need. Care has been taken to ensure households have not been over, under or double counted in accordance with Welsh Government Guidance.

7. Existing stock and planned supply

Locally operating RSLs have been engaged with to ensure a robust overview of existing stock, further verified through Census data and Council records. Planned supply has been carefully analysed based on trend-based lettings, existing commitments (schemes with planning permission) and the SHG Programme, in accordance with Welsh Government Guidance.

Key Input Assumptions

Key Issues

1. Affordability criteria

Affordability criteria for market housing sets the minimum income for a household to be considered for market housing tenure. The default affordability assumption for market housing is where a median rent equates to no

more than 30% of household income. This was set by Welsh Government's technical working group for the national and regional housing need estimates published in 2020 and purposely followed the long-term assumption dating back to the previous LHMA Step-by-Step Guide published in 2014. This default assumption was therefore made on the basis of low and stable inflation, low and stable interest rates and relatively consistent cost of living expectations; assumptions that were trend based and expected to continue. However, consumer price inflation rose significantly in 2021, interest rates rose significantly in 2022, house prices and housing related costs have also increased against a backdrop of low wage inflation. The current cost of living crisis therefore provides a clear indication that a more conservative approach is necessary. A more appropriate affordability assumption for market housing has therefore been utilised in this LHMA; where median rent equates to no more than 25% of income.

2. First time buyer (FTB) assumptions

For each HMA, an appropriate percentile value has been selected at which FTBs would enter the market. Welsh Government's technical working group suggested a value between the 25th percentile and 40th percentile was considered appropriate. All first time buyer assumptions have been maintained within these parameters, ranging from the 25th percentile in Porthcawl (the least affordable part of the county borough) to the 40th percentile in the Valleys HMAs (the most affordable parts of the county borough). These assumptions have also been informed by considering house price to income ratios as detailed within this LHMA.

Original (2006) LHMA guidance suggested that a household is likely to be able to afford to purchase a home costing 3.5 times its gross income and this ratio has indeed be used as a longstanding first time buyer benchmark in

LHMAs. More recent data from UK finance has shown that the 2022 first time buyer property value to income ratio for Bridgend County Borough is 4.31, which represents an increase from the 2021 figure of 4.10. It is recognised that lenders conduct sophisticated assessments on potential borrowers in the current market. This will include analysis of a wide range of factors including income expenditure, family makeup, lifestyle and job security when assessing a borrower's likelihood of being able to meet mortgage repayments. However, these complex assessments cannot be replicated in a study of this type. Therefore, the 4.31 affordability ratio provides a pragmatic, updated means of estimating market affordability and has been utilised within this LHMA calculation.

3. Percentage of households eligible for owner occupier tenure that decide to go on and buy

It is recognised that not every household allocated to owner occupied tenure will want to purchase a home. Welsh Government's technical working group considered an assumption in the range of 40% to 60% as reasonable. This LHMA has therefore utilised a conservative assumption of 50%.

During analysis, alternative assumptions of 40% and 60% were run through the LHMA tool to gauge the impact. A 40% assumption resulted in a fifth less owner occupiers and a fifth more private renters, whereas a 60% assumption resulted in a fifth more owner occupiers and a fifth less private renters. This is unsurprising, although there is no evidence-base rationale to depart from using a conservative 50% assumption (refer to Calculations/Outputs Section below).

4. Five-year financial forecast for key variables – income, rent and house prices

Default assumptions (derived from the OBR financial forecast) have been used when estimating changes in rents, income and house prices over the first 5 years of the LHMA projection period. Based on the current socio-

economic position, an assumption of 'greater inequality'* has been utilised when estimating how the distribution of household income will change over the following 5 years. This will be duly monitored as part of future LHMA updates.

(*This assumes the income at the 10th percentile will be 1 percentage basis point lower than the median and 1 percentage basis point higher at the 90th percentile. The 1 percentage basis point reduces uniformly from these two extreme percentiles to no change at the median).

5. Calculation of intermediate housing (IR and LCHO)

The decision was made not to attempt to split intermediate housing by intermediate rent and LCHO within the tool. As demonstrated in the analysis, there is no gap to introduce intermediate rent in the Ogmore and Garw Valleys and only higher priced parts of the Llynfi Valley demonstrate a gap to introduce the tenure; a nuance that the tool does not capture.

In practice, and even in less affordable areas, there is persistently an overlap between households who can afford intermediate rent and LCHO. The most appropriate tenure depends not only on household affordability, but also on local market conditions. The most appropriate intermediate tenures are best determined on a site by site basis, taking local housing market conditions into account. The LHMA will provide an indication of the scope to meet housing need within the 'squeezed middle', although the precise nature of any intermediate tenures to be delivered will require more specific, detailed consideration of local house prices, private rents, social rents and housing need. This is best considered outside of the tool.

Calculations / Outputs	Key Issues
1. Market housing need covering owner occupier and private rented sector	There is a relatively even split of owner occupation (ranging from 55 to 113 homes per annum depending on the variant) and private rented sector tenures (ranging from 65 to 132

homes per annum depending on variant) at county borough level.

Gross market housing need is highest in the key growth areas of Bridgend, Porthcawl, Pencoed and Pyle, Kenfig Hill and Cornelly. This is to be expected and accords with the designation of these localities as Sustainable Growth Areas within the RLDP.

2. Affordable housing need covering social rent and immediate housing

There is a fairly even split between social rented and intermediate tenures needed at county borough level. Net social rented accommodation need accounts for 55% of the total across all scenarios, compared to 45% intermediate tenures.

However, this differs significantly by HMA. Intermediate need is highest in Bridgend and is approximately half of the total affordable housing need in this HMA across all scenarios, whereas it is notably lower in the Ogmore and Garw Valleys, where market affordability is less acute (and there is less of a gap to introduce such tenures).

Total need for affordable housing is highest in the key growth areas of Bridgend, Porthcawl, the Llynfi Valley, Pencoed and Pyle, Kenfig Hill and Cornelly. This accords with the designation of these localities as Sustainable/Regeneration Growth Areas within the RLDP.

3. Scenario testing tables

Alternative percentages were tested for those households that are both eligible for owner occupation and decide to purchase a home. Assumptions of 40% and 60% were run through the LHMA tool to gauge the impact, although this only marginally altered the tenure split estimates between owner-occupation and private rent (by a fifth, respectively). In practice, there will always be an overlap between mid-bracket households who could choose to rent or purchase a property on the open market. Such choices will not always be dependent on affordability considerations and may also depend on factors such as temporary job relocation, relationship breakdown, property

choice and other personal preferences. A 50% assumption is considered the most pragmatic for the purposes of this high level calculation, while acknowledging preferences of households will vary in different areas and at different times over the LHMA period. There is no robust justification to proceed with a higher or lower assumption.

4. Five year outputs / 10 year outputs

Combined, market housing need equates to between a fifth to a third of total gross need for the first five years of the LHMA period (depending on the variant) and then over half of total gross need for the next ten years of the LHMA period.

This proportionate hike in the latter ten years is to be expected as the model assumes the existing unmet need backlog will have been cleared at that point. As such, affordable housing need is proportionately lower in the latter ten years of the LHMA period. This naturally varies by HMA and variant.

5. LHMA Additional Housing Need Estimates

- 5.1 This LHMA has provided a range of housing need estimates based on the suite of Welsh Government variant household projections together with the RLDP projection. Each variant has been analysed through the LHMA tool and supplemented with a range of socio-economic, demographic and property market data in order to provide detailed insights into the mechanics of the local housing markets. This process has estimated how housing need translates into different sizes, types and tenures of housing to develop long-term views of need and demand, inform local strategies and identify appropriate housing mixes on new sites. Operationally, this LHMA provides a tool to justify affordable housing provision on planning applications, inform allocation of SHG and highlight strategic housing priorities at the local level.
- 5.2 This LHMA has been completed during the latter stages (although prior to adoption) of the RLDP (2018-2033). Welsh Government Guidance states, “where possible and appropriate as determined by the local authority, it is recommended that the projections utilised within LHMA’s and Development Plans are consistent, although this will depend on publication timescales” (WG, 2022, p.19). For such purposes of consistency, the same projection used to underpin the RLDP has been extended to cover this LHMA period and forms the primary additional housing need estimate. A summary of the full outputs in Section 4 are provided in Tables 5-7 below for ease of reference.

Table 5: Annual Gross Housing Need Estimates, RLDP Projection

	First 5 Years	Remaining 10 Years
Owner Occupier	111	111
Private Rented Sector	129	129
Intermediate	116	72
Social Rent	408	97
Total Annual Need	763	409

*Figures may not sum to totals due to rounding

5.3 As detailed in Table 5, the additional housing need estimates are split into market housing (owner occupier and private rented sector) and affordable housing (social rent and intermediate housing needs). These are gross estimates only, meaning no account is taken of planned supply and turnover of existing stock. Analysing gross need in this manner enables a four tenure housing need estimate to be calculated. For ease of illustration, Table 6 extrapolates the annual need to provide a full 15-year overview of gross need by HMA.

Table 6: 15-Year Gross Housing Need Estimate, RLDP Projection

HMA	Affordable Housing		Market Housing		Total
	Social Rent	Inter-mediate	Owner Occupier	Private Rent	
Bridgend and Surrounding	1,029	453	547	683	2,712
Garw Valley	50	15	0	0	65
Llynfi Valley	316	171	225	157	869
Ogmore Valley	50	17	0	0	67
Pencoed and Heol y Cyw	271	151	238	329	989
Porthcawl	484	191	233	339	1,248
Pyle, Kenfig and Cornelly	527	201	276	285	1,289
Valleys Gateway	284	97	140	146	667
Total	3,011	1,296	1,659	1,940	7,905

*Figures may not sum to totals due to rounding

- 5.4 Need for additional affordable housing is best considered in 'net' terms, after having factored in planned supply and expected turnover of existing stock. The LHMA tool applies supply and turnover to the first five years of the LHMA period, although no further allowance is made for planned supply and turnover of existing stock for the remaining 10 years as it becomes less accurate to predict this beyond year 5. For simplicity, Table 7 illustrates the total 15-year net affordable housing need estimate by tenure, number of bedrooms and HMA.

Table 7: 15-Year Net Affordable Housing Need Estimate, RLDP Projection

HMA	Social Rent (Bedrooms)				Social Rent (Total)	**Inter-mediate	Total
	1	2	3	4			
Bridgend and Surrounding	233	58	39	27	356	453	809
Garw Valley	20	0	0	3	23	15	38
Llynfi Valley	130	21	14	12	177	171	348
Ogmore Valley	18	0	0	6	24	17	41
Pencoed and Heol y Cyw	99	28	19	7	152	151	303
Porthcawl	169	38	51	23	282	186	468
Pyle, Kenfig and Cornelly	277	38	26	18	359	201	560
Valleys Gateway	140	15	10	9	175	92	266
Total	1,085	198	159	106	1,548	1,286	2,834

* Figures may not sum to totals due to rounding

** Intermediate need primarily comprises 2 and 3 bedroom homes

- 5.5 The net affordable housing need estimates detailed in Table 7 should be used as a broad spatial guide to strategically increase the supply of affordable housing within the county borough. However, it would be inaccurate to assume housing need can be met 'anywhere' within these broad HMAs. In identifying appropriate sites to meet the need, due consideration should be had to a range of placemaking principles within the immediate environ, including whether the site can connect to an active

travel route and the proximity / ease of access to existing services, facilities, employment opportunities, education provision and public transport options. The identification of need within a broad HMA does not override the requirement to have regard to sustainable placemaking principles and the full suite of policies within the LDP when proposing sites for development. This is especially the case for any affordable housing exception sites that may be proposed outside of defined settlement boundaries; such proposals should meet an identified pressing need that cannot be accommodated within settlement boundaries and should not result in car-dependent, isolated clusters of affordable housing devoid of sustainable placemaking principles.

Market Housing

- 5.6 Market housing need estimates are shown as gross estimates only because no allowance is made for planned supply and turnover of existing stock. The gross estimates are slightly weighted towards the private rented sector over the 15-year LHMA period, although in practice, there will always be an affordability overlap between the two tenures. There are a wide range of factors, not only related to affordability, which determine the market tenures different households will reside within. This will vary by time period, HMA and property type. As such, the tenure splits should not be considered prescriptive.
- 5.7 Market housing estimates account for just under half of the overall housing need estimate (with private rent accounting for 25% of total gross need and owner occupation accounting for 21%). However, in practice, some households will choose to reside within market housing irrespective of the affordability assumptions utilised within this LHMA. It is not possible for a study of this type to capture the wide range of socioeconomic factors that will underpin each future household's decision to reside within a certain tenure.
- 5.8 Market housing need is ultimately highest within Bridgend and significant within the other main settlements of Porthcawl, Pencoed, the Llynfi Valley and Pyle, Kenfig and Cornelly. While the estimates identify 'zero' need in the Ogmore and Garw Valleys, this should not be misinterpreted as a signal to prevent all development in these HMAs. There is still a need to diversify the dwelling stock within these areas and enhance housing options, despite constraints around viability, topography and land contamination. The RLDP recognises the importance of fostering sustainable communities within the Ogmore and Garw Valleys directly. It seeks to enable alternative forms of development to help deliver smaller-scale growth, such as (but not limited to) co-operative housing, self-build and custom build opportunities alongside other forms of development.

Social Rented Accommodation

- 5.9 The majority of net social rented need identified is for one bedroom accommodation, which reflects a number of inter-related factors. There are increasingly higher instances of single person households and couples with no children projected to form within the county borough, a limited supply of sustainable one bedroom provision in high need areas and a mismatch with the existing dwelling stock. This is a long term trend and is likely to continue into the foreseeable future with later marriages, and higher instances of divorce, separation and widowhood. As such, it is important to increase the supply of smaller units in a sustainable manner. One bedroom walk-up flats with no communal spaces are often optimal in the social rented sector to assist with management, maximise dwelling integration within wider settings and provide tenants with their 'own front door'.
- 5.10 However, some households may only need a one bedroom property for a relatively short period of time as circumstances change. Such properties can therefore turnover fairly frequently and an over-concentration of one bedroom accommodation can result in an (unintended) unsettled community. While the significant need for one bedroom accommodation must be addressed, it is equally important to ensure the delivery of larger units is not overlooked and balanced communities are planned for. Indeed, there is also a persistent shortfall of larger family homes. While the latter need is smaller in scale, the shortfall is compounded by the relatively low rate at which these properties turnover. Dwelling mixes weighted towards one bedroom homes, yet still incorporating a suitable mix of larger properties will therefore facilitate opportunities for sustainable tenant progression.
- 5.11 Geographically speaking, the greatest need for social rented accommodation is in the south of the county borough. This is unsurprising as this is where property prices are the highest and affordability issues are most acute. Many areas in the south of the county borough also contain relatively low levels of existing affordable housing. The HMAs of Bridgend, Porthcawl, Pencoed, the Valleys Gateway and Pyle, Kenfig and Cornelly all demonstrate significantly high net need for social housing.
- 5.12 However, the Llynfi Valley is also a high need area, which is unsurprising with Maesteg being the second largest town in the county borough. While the need for additional social housing is lower in scale within the Ogmore and Garw Valleys, there is still a clear need to diversify the type of accommodation available. This LHMA evidences the need to instil sustainable clusters of smaller one bedroom properties within such communities to counter-balance the predominantly larger social rented stock already in existence.

Intermediate Accommodation

- 5.13 The identified net need for intermediate accommodation is slightly less significant than the need for social housing in absolute terms. However, it is still notable and most prevalent in southern housing markets, where private rents and house prices outstrip first time buyer incomes to a greater degree. In practice, affordability does not necessarily mean that households will choose to access intermediate products. Some households will prefer to apply for social housing, whereas others may choose to enter into arrangements that would be considered unaffordable (for the purposes of this assessment) in order to access market housing. However, it is important to maintain choice in the market and ensure smaller, affordable properties are available for newly forming households to move into. Otherwise, households may have no other option than to stretch themselves to the margins of affordability, be priced out of their areas of choice, have to relocate elsewhere and/or be unable to fulfil their reasonable preferences.
- 5.14 While there is a significant identified need for intermediate housing, there is likely to be multi-tenure cross over (in terms of affordability) for products such as LCHO and intermediate rent. Therefore, the key consideration is whether a gap exists in the market to introduce such tenures. In particular, there is generally an insignificant margin between market rent and social rent to introduce an intermediate rental product in all areas. This is especially the case in the Ogmore and Garw Valleys, where median market rents and social rents are interchangeable. However, the most appropriate type(s) of intermediate product(s) should be considered on a site by site basis to take account of need, constraints, and the local housing market in order to deliver a sustainable mix that produces usefully affordability products for the area.
- 5.15 Overall, 70% of market value produces a usefully affordable LCHO product in many parts of the County Borough. However, based on wider house price to income ratios (8-10 times), a 60% of market value LCHO product is typically required within Porthcawl in order to meet the needs of newly forming households.

Extrapolated Need Over 15-Year LHMA Period

- 5.16 For completeness (and to overtly extrapolate the total affordable housing need over the 15 year LHMA period), **this LHMA has calculated a total need for 2,834 affordable housing units, comprising 1,548 social rented dwellings and 1,286 intermediate dwellings.** However, it is important to emphasise that this identified need should not be considered a delivery target or even the solution to the affordability issues within the county borough. It instead indicates

the scale of housing need within Bridgend County Borough, which the Council will seek to address through a range of market interventions as far as practically possible. These include yet are not limited to SHG and other capital grant funding, planning contributions, RSL funded schemes, reconfiguration of stock, social lettings agencies, private sector leasing schemes and re-utilisation of empty homes.

Differences Between Current and Previous LHMA

- 5.17 Any LHMA is based on a snapshot at a point in time. It is therefore a gross oversimplification to directly compare the outputs from one LHMA with another. Welsh Government Guidance recognises this point and deems such an exercise inappropriate due to different underlying data and assumptions. With this caveat in mind, Table 8 provides an overview of the 2021 LHMA findings alongside the findings of this 2024 LHMA to illustrate how outputs differ between the two. Table 9 adds further context by illustrating how data inputs and key assumptions vary between the 2021 and 2024 LHMA.
- 5.18 There is one further important consideration when viewing both sets of outputs 'at a glance'. Firstly, the 2021 LHMA followed the previous Welsh Government methodology, which is subtly different to the new LHMA tool and guidance. The previous methodology did not require a market housing estimate and was primarily geared towards an affordable housing calculation. Ultimately, therefore, the new methodology will produce different outputs to the previous guidance and some of the columns within Tables 8 and 9 cannot be completed for the previous LHMA (2021).

Table 8: Differences Between Additional Housing Need Estimates

Annual Additional Housing Need Estimates (First Five Years)	2024 LHMA	2021 LHMA
Total housing need estimate (gross)	763	N/A
Market housing	240	N/A
Affordable housing	523	N/A
Percentage split of additional housing need by market and affordable housing	Market: 31% Affordable: 69%	N/A
Annual planned supply and turnover of existing stock for affordable housing	446	518
Affordable housing need – net of planned supply and turnover of existing stock	229	451
Annual additional housing need estimate split by tenure:		
Owner occupier	111	N/A
Private rented sector	129	N/A
LCHO – net basis	27	171
Intermediate rent – net basis	87	
Social rent – net basis	115	280
One bedroom social rent	97	233
Two bedrooms social rent	1	14
Three bedrooms social rent	6	19
Four+ bedrooms social rent	11	14

Annual Additional Housing Need Estimates (First Five Years)		2024 LHMA	2021 LHMA
Market housing percentage split (gross basis):			
Owner occupier estimate		46%	N/A
Private rented sector estimate		54%	N/A
Affordable housing percentage split (net basis):			
LCHO		12%	} 38%
Intermediate rent		38%	
Social rent		50%	62%
Social housing need percentage split by number of bedrooms (net basis):			
1 bed		84%	83%
2 beds		1%	5%
3 beds		5%	7%
4+ beds		10%	5%

*Figures may not sum to totals due to rounding

Table 9: Analysis of Differences in Data Inputs and Key Assumptions

Data Input and Key Assumptions	Current LHMA	Previous LHMA
Number of HMAs and basis of defining HMAs (ward, MSOA, LSOA)	Eight	Eight
Selected household projection basis	RLDP projection (extended to cover LHMA period)	RLDP projection
Annual newly arising need	RLDP projection (extended to cover LHMA period)	RLDP projection
Rent data – state default or source used	Rent Office Data	Hometrack (Rent Office Data Previously Unavailable to Local Authorities)
House price paid data – state default or source used	Price Paid Data	Price Paid Data
Income data – state source used	CACI Paycheck	CACI Paycheck via Hometrack
Annual existing unmet housing need	Common Housing Register	Common Housing Register
Market housing affordability criteria	25%	N/A
Social rent affordability criteria	35%	N/A
Percentage of those considered appropriate for owner occupier that go onto buy	50%	N/A

Average FTB property price for the LA	£136,500	£110,821
FTB property value to income ratio for the LA	4.31	3.5
Five-year financial forecast – OBR or alternative source	Five-year financial forecast – OBR	N/A
Split of intermediate housing need – method 1, 2 or 3	1	N/A

Appendix 1: Output Summary Tables from LHMA Tool

Template for the annual additional housing need estimates using different household projections								
FIRST 5 YEARS OF THE LHMA PERIOD								
Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)	Affordable housing		Market housing (newly arising need only)		Total			
	523		240		763			
	Newly arising need		Existing unmet need					
Less planned supply and turnover of existing stock	169		354					
	Net affordable housing		Intermediate rent and LCHO		Social rent			
Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock	229		of which		114		115	
Basis of the household projections								
User Projections 1								
Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period								
LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)								
The first table provides the additional affordable housing need estimates on the following basis: *at HMA level *by tenure (LCHO, intermediate rent and social rent) *annual estimate for the first 5 years of the LHMA period *the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.								
HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	97	1	6	11	115	87	27	229
Bridgend and Surrounding	10	-	-	2	13	32	11	56
Garw Valley	4	-	-	1	5	-	3	8
Llynfi Valley	13	-	-	1	14	12	5	31
Ogmore Valley	4	-	-	1	5	-	3	8
Pencoed and Heol Y Cyw	2	-	-	-	2	10	1	14
Porthcawl	14	1	6	3	25	12	2	39
Pyle, Kenfig and Cornelly	31	-	-	2	33	13	2	48
Valleys Gateway	18	-	-	1	19	7	-	26
9	-	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-	-
LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)								
The second table provides the additional total housing need estimates on the following basis: *includes market and affordable housing *at HMA level *by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent) *annual estimate for the first 5 years of the LHMA period								
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c)= (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c)+ (f)	
Additional housing need estimates by tenure	408	116	523	111	129	240	763	
Bridgend and Surrounding	147	43	191	36	46	82	273	
Garw Valley	10	3	13	-	-	-	13	
Llynfi Valley	41	17	58	15	10	25	84	
Ogmore Valley	10	3	13	-	-	-	13	
Pencoed and Heol Y Cyw	26	11	37	16	22	38	75	
Porthcawl	65	15	81	16	23	38	119	
Pyle, Kenfig and Cornelly	66	15	81	18	19	37	119	
Valleys Gateway	41	8	49	9	10	19	68	
9	-	-	-	-	-	-	-	
10	-	-	-	-	-	-	-	
11	-	-	-	-	-	-	-	
12	-	-	-	-	-	-	-	
13	-	-	-	-	-	-	-	
14	-	-	-	-	-	-	-	
15	-	-	-	-	-	-	-	
16	-	-	-	-	-	-	-	
17	-	-	-	-	-	-	-	

18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.

No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing	(d) Owner occupier	(e) Private rented sector	(f) Market Housing	(g) Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	97	72	169	111	129	240	409
Bridgend and Surrounding	29	24	53	36	46	82	135
Garw Valley	-	-	-	-	-	-	-
Llynfi Valley	11	9	20	15	10	25	45
Ogmore Valley	-	-	-	-	-	-	-
Pencoed and Heol Y Cyw	14	9	24	16	22	38	61
Porthcawl	16	11	27	16	23	38	65
Pyle, Kenfig and Cornelly	19	13	32	18	19	37	70
Valleys Gateway	8	6	14	9	10	19	33
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

HMA	Average annual estimates			15-year estimates		
	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	103	86	189	1,548	1,286	2,834
Bridgend and Surrounding	24	30	54	356	453	809
Garw Valley	2	1	3	23	15	38
Llynfi Valley	12	11	23	177	171	348
Ogmore Valley	2	1	3	24	17	41
Pencoed and Heol Y Cyw	10	10	20	152	151	303
Porthcawl	19	12	31	282	186	468
Pyle, Kenfig and Cornelly	24	13	37	359	201	560
Valleys Gateway	12	6	18	175	92	266
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-
17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Data items / Key assumptions

	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	Greater Inequality	1.00%	1.00%	1.00%	1.00%	1.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	25%
Social rent affordability criteria	35%

Data item	Data Sources	Basis of the data			
Income data by HMA	Paycheck	2022			
House price paid data by HMA	Land Registry Data	Calendar year			
Rent prices	Rent Officers Wales	Financial year			
Household projection basis	User Projections 1				
Percentage of households considered for owner occupier tenure that go on to buy	50%				
HMA assumptions					
HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent	
Bridgend and Surrounding	£ 170,079	4.3	£ 20,716	£ 32,150	
Garw Valley	£ 87,808	4.3	£ 15,787	£ 23,939	
Llynfi Valley	£ 96,114	4.3	£ 16,800	£ 26,200	
Ogmore Valley	£ 92,950	4.3	£ 16,361	£ 24,012	
Pencoed and Heol Y Cyw	£ 175,320	4.3	£ 21,491	£ 31,117	
Porthcawl	£ 197,766	4.3	£ 22,767	£ 34,664	
Pyle, Kenfig and Cornelly	£ 137,448	4.3	£ 19,762	£ 29,608	
Valleys Gateway	£ 138,436	4.3	£ 19,463	£ 29,580	
9		4.3			
10		4.3			
11		4.3			
12		4.3			
13		4.3			
14		4.3			
15		4.3			
16		4.3			
17		4.3			
18		4.3			
19		4.3			
20		4.3			

Average annual additional housing need estimates using the Welsh Government PRINCIPAL household projections								
FIRST 5 YEARS OF THE LHMA PERIOD								
Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)	Affordable housing		Market housing (newly arising need only)		Total			
	489		191		679			
Less planned supply and turnover of existing stock	Newly arising need		Existing unmet need					
	134		354					
Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock	Net affordable housing		Intermediate rent and LCHO		Social rent			
	200		99		101			
Basis of the household projections								
Principal								
Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period								
LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)								
The first table provides the additional affordable housing need estimates on the following basis: *at HMA level *by tenure (LCHO, intermediate rent and social rent) *annual estimate for the first 5 years of the LHMA period *the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.								
HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	85	1	6	10	101	72	27	200
Bridgend and Surrounding	7	-	-	2	9	27	11	47
Garw Valley	4	-	-	1	5	-	3	8
Llynfi Valley	11	-	-	1	12	11	5	27
Ogmore Valley	4	-	-	1	5	-	3	8
Pencoed and Heol Y Cyw	1	-	-	-	1	9	1	10
Porthcawl	12	1	6	3	22	10	2	34
Pyle, Kenfig and Cornelly	29	-	-	1	30	10	2	42
Valleys Gateway	17	-	-	1	18	6	-	24
9	-	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-	-
LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)								
The second table provides the additional total housing need estimates on the following basis: *includes market and affordable housing *at HMA level *by tenure (owner occupier, private rented sector(PRS), LCHO, intermediate rent and social rent) *annual estimate for the first 5 years of the LHMA period								
HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c) + (f)	
Additional housing need estimates by tenure	388	101	489	88	103	191	679	
Bridgend and Surrounding	141	38	180	29	36	65	245	
Garw Valley	10	3	13	-	-	-	13	
Llynfi Valley	39	15	54	12	8	20	75	
Ogmore Valley	10	3	13	-	-	-	13	
Pencoed and Heol Y Cyw	23	9	32	13	17	30	63	
Porthcawl	62	13	75	12	18	30	105	
Pyle, Kenfig and Cornelly	62	12	75	15	15	30	104	
Valleys Gateway	39	7	46	7	8	15	61	
9	-	-	-	-	-	-	-	
10	-	-	-	-	-	-	-	
11	-	-	-	-	-	-	-	
12	-	-	-	-	-	-	-	
13	-	-	-	-	-	-	-	
14	-	-	-	-	-	-	-	
15	-	-	-	-	-	-	-	

16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.

No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing	(d) Owner occupier	(e) Private rented sector	(f) Market Housing	(g) Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	77	57	134	88	103	191	325
Bridgend and Surrounding	23	19	42	29	36	65	107
Garw Valley	-	-	-	-	-	-	-
Llynfi Valley	9	7	16	12	8	20	36
Ogmore Valley	-	-	-	-	-	-	-
Pencoed and Heol Y Cyw	11	8	19	13	17	30	49
Porthcawl	13	9	22	12	18	30	52
Pyle, Kenfig and Cornelly	15	10	26	15	15	30	55
Valleys Gateway	6	5	11	7	8	15	26
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

Average annual estimates			15-year estimates			
(a)	(b)	(c)				
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	85	71	156	1,278	1,066	2,343
Bridgend and Surrounding	18	25	44	276	380	656
Garw Valley	2	1	3	23	15	38
Llynfi Valley	10	10	19	147	145	292
Ogmore Valley	2	1	3	24	17	41
Pencoed and Heol Y Cyw	8	8	16	115	122	237
Porthcawl	16	10	26	233	151	384
Pyle, Kenfig and Cornelly	20	11	31	306	162	468
Valleys Gateway	10	5	15	153	74	227
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-
17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Data items / Key assumptions

	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	Greater Ineq	1.00%	1.00%	1.00%	1.00%	1.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	25%
Social rent affordability criteria	35%

Data item	Data Sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Financial year
Household projection basis	Principal	

Percentage of households considered for owner occupier tenure that go on to buy	50%
---	-----

HMA assumptions				
HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Bridgend and Surrounding	£ 170,079	4.3	£ 20,716	£ 32,150
Garw Valley	£ 87,808	4.3	£ 15,787	£ 23,939
Llynfi Valley	£ 96,114	4.3	£ 16,800	£ 26,200
Ogmore Valley	£ 92,950	4.3	£ 16,361	£ 24,012
Pencoed and Heol Y Cyw	£ 175,320	4.3	£ 21,491	£ 31,117
Porthcawl	£ 197,766	4.3	£ 22,767	£ 34,664
Pyle, Kenfig and Cornelly	£ 137,448	4.3	£ 19,762	£ 29,608
Valleys Gateway	£ 138,436	4.3	£ 19,463	£ 29,580
9		4.3		
10		4.3		
11		4.3		
12		4.3		
13		4.3		
14		4.3		
15		4.3		
16		4.3		
17		4.3		
18		4.3		
19		4.3		
20		4.3		

Average annual additional housing need estimates using the Welsh Government HIGHER VARIANT household projections								
FIRST 5 YEARS OF THE LHMA PERIOD								
Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)	Affordable housing		Market housing (newly arising need only)		Total			
	527		245		772			
		Newly arising need	Existing unmet need					
		172	354					
Less planned supply and turnover of existing stock								
Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock	232	of which		Intermediate rent and LCHO	Social rent			
				115	117			
Basis of the household projections								
Higher Variant								
Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period								
LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)								
The first table provides the additional affordable housing need estimates on the following basis:								
*at HMA level								
*by tenure (LCHO, intermediate rent and social rent)								
*annual estimate for the first 5 years of the LHMA period								
*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.								
HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)	(h)
	one bedroom	two bedrooms	three bedrooms	four+ bedrooms	Social rent	Intermediate rent	LCHO	Affordable Housing
					(a) + (b) + (c) + (d) = (e)			(h) = (e) + (f) + (g)
Additional housing need estimates by tenure	98	1	6	11	117	88	27	232
Bridgend and Surrounding	11	-	-	2	13	33	11	57
Garw Valley	4	-	-	1	5	-	3	8
Llynfi Valley	13	-	-	1	14	12	5	31
Ogmore Valley	4	-	-	1	5	-	3	8
Pencoed and Heol Y Cyw	3	-	-	-	3	11	1	14
Porthcawl	15	1	6	3	25	13	2	40
Pyle, Kenfig and Cornelly	32	-	-	2	33	13	2	48
Valleys Gateway	18	-	-	1	19	7	-	26
9	-	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-	-
LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)								
The second table provides the additional total housing need estimates on the following basis:								
*includes market and affordable housing								
*at HMA level								
*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)								
*annual estimate for the first 5 years of the LHMA period								
HMA	(a)	(b)	(c)	(d)	(e)	(f)	(g)	
	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need	
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)	
Additional housing need estimates by tenure	410	117	527	113	132	245	772	
Bridgend and Surrounding	148	44	192	37	46	84	275	
Garw Valley	10	3	13	-	-	-	13	
Llynfi Valley	42	17	59	15	11	26	85	
Ogmore Valley	10	3	13	-	-	-	13	
Pencoed and Heol Y Cyw	26	11	38	16	22	39	76	
Porthcawl	66	16	81	16	23	39	120	
Pyle, Kenfig and Cornelly	67	15	82	19	19	38	120	
Valleys Gateway	41	8	49	10	10	19	69	
9								

10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.

No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	99	73	172	113	132	245	417
Bridgend and Surrounding	30	24	54	37	46	84	138
Garw Valley	-	-	-	-	-	-	-
Llynfi Valley	11	9	20	15	11	26	46
Ogmore Valley	-	-	-	-	-	-	-
Pencoed and Heol Y Cyw	14	10	24	16	22	39	63
Porthcawl	16	12	28	16	23	39	67
Pyle, Kenfig and Cornelly	20	13	33	19	19	38	71
Valleys Gateway	8	6	14	10	10	19	33
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	105	87	192	1,575	1,308	2,883
Bridgend and Surrounding	24	31	55	364	460	824
Garw Valley	2	1	3	23	15	38
Llynfi Valley	12	12	24	180	174	354
Ogmore Valley	2	1	3	24	17	41
Pencoed and Heol Y Cyw	10	10	21	156	154	310
Porthcawl	19	13	32	287	190	476
Pyle, Kenfig and Cornelly	24	14	38	364	205	569
Valleys Gateway	12	6	18	177	93	270
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-

17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Data items / Key assumptions

	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	Greater Ineq	1.00%	1.00%	1.00%	1.00%	1.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	25%
Social rent affordability criteria	35%

Data item	Data Sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Financial year
Household projection basis	Higher Variant	

Percentage of households considered for owner occupier tenure that go on to buy	50%
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HMA assumptions

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Bridgend and Surrounding	£ 170,079	4.3	£ 20,716	£ 32,150
Garw Valley	£ 87,808	4.3	£ 15,787	£ 23,939
Llynfi Valley	£ 96,114	4.3	£ 16,800	£ 26,200
Ogmore Valley	£ 92,950	4.3	£ 16,361	£ 24,012
Pencoed and Heol Y Cyw	£ 175,320	4.3	£ 21,491	£ 31,117
Porthcawl	£ 197,766	4.3	£ 22,767	£ 34,664
Pyle, Kenfig and Cornelly	£ 137,448	4.3	£ 19,762	£ 29,608
Valleys Gateway	£ 138,436	4.3	£ 19,463	£ 29,580
9		4.3		
10		4.3		
11		4.3		
12		4.3		
13		4.3		
14		4.3		
15		4.3		
16		4.3		
17		4.3		
18		4.3		
19		4.3		
20		4.3		

Average annual additional housing need estimates using the Welsh Government LOWER VARIANT household projections

FIRST 5 YEARS OF THE LHMA PERIOD

Estimated average annual additional housing need (gross need before planned supply and turnover of existing stock)

Affordable housing

439

Newly arising need

84

Existing unmet need

354

Net affordable housing

160

Less planned supply and turnover of existing stock

Estimated annual average additional affordable housing need, net of planned supply and turnover of existing stock

Market housing (newly arising need only)

120

Intermediate rent and LCHO

78

Social rent

82

Total

558

Basis of the household projections

Lower Variant

Detailed breakdown of the additional housing need estimates over the first 5 years of the LHMA period

LHMA Report Table 1: Estimated annual additional affordable housing need by HMA and tenure (net need, net of turnover of existing stock and planned supply)

The first table provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

*the estimates have been reduced to allow for turnover of existing affordable stock and planned supply.

HMA	(a) one bedroom	(b) two bedrooms	(c) three bedrooms	(d) four+ bedrooms	(e) Social rent (a) + (b) + (c) + (d) = (e)	(f) Intermediate rent	(g) LCHO	(h) Affordable Housing (h) = (e) + (f) + (g)
Additional housing need estimates by tenure	69	-	5	9	82	51	27	160
Bridgend and Surrounding	1	-	-	1	3	20	11	34
Garw Valley	4	-	-	1	5	-	3	8
Llynfi Valley	9	-	-	1	10	8	5	23
Ogmore Valley	4	-	-	1	5	-	3	8
Pencoed and Heol Y Cyw	-	-	-	-	-	6	1	7
Porthcawl	9	-	5	3	17	7	2	26
Pyle, Kenfig and Cornelly	25	-	-	1	26	7	2	35
Valleys Gateway	16	-	-	1	17	4	-	20
9	-	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-	-

LHMA Report Table 2: Estimated annual additional total housing need estimates by HMA and tenure (gross need, before turnover and supply)

The second table provides the additional total housing need estimates on the following basis:

*includes market and affordable housing

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the first 5 years of the LHMA period

HMA	(a) Social rent	(b) Intermediate rent and LCHO	(c) Affordable Housing (c) = (a) + (b)	(d) Owner occupier	(e) Private rented sector	(f) Market Housing (f) = (d) + (e)	(g) Additional housing need (g) = (c) + (f)
Additional housing need estimates by tenure	359	80	439	55	65	120	558
Bridgend and Surrounding	133	31	164	18	23	41	205
Garw Valley	10	3	13	-	-	-	13
Llynfi Valley	36	13	49	7	5	13	61
Ogmore Valley	10	3	13	-	-	-	13
Pencoed and Heol Y Cyw	19	7	26	8	11	19	44
Porthcawl	57	10	67	8	11	19	86
Pyle, Kenfig and Cornelly	57	9	65	9	9	19	84
Valleys Gateway	37	5	42	5	5	10	52
9	-	-	-	-	-	-	-

10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Detailed breakdown of the additional total housing need estimates over the remaining 10 years of the LHMA period

LHMA Report Table 3: Estimated annual additional housing need estimates by HMA and tenure for the remaining 10 years of the LHMA period

The third table provides the additional housing need estimates on the following basis:

*at HMA level

*by tenure (owner occupier, private rented sector (PRS), LCHO, intermediate rent and social rent)

*annual estimate for the remaining 10 years of the LHMA period

*the estimates are based solely on newly arising need (it is assumed any existing unmet need is met during the first 5 years)

*the affordable housing need estimates in should be combined with the affordable housing need in Table 1 to produce a 15-year estimate of affordable housing.

No further allowance has been made for supply at this point as it becomes less accurate to predict committed supply and turnover beyond year 5.

	(a)	(b)	(c)	(d)	(e)	(f)	(g)
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Owner occupier	Private rented sector	Market Housing	Additional housing need
			(c) = (a) + (b)			(f) = (d) + (e)	(g) = (c) + (f)
Additional housing need estimates by tenure	49	36	84	55	65	120	204
Bridgend and Surrounding	15	12	26	18	23	41	67
Garw Valley	-	-	-	-	-	-	-
Llynfi Valley	5	4	10	7	5	13	22
Ogmore Valley	-	-	-	-	-	-	-
Pencoed and Heol Y Cyw	7	5	12	8	11	19	31
Porthcawl	8	6	14	8	11	19	33
Pyle, Kenfig and Cornelly	10	6	16	9	9	19	35
Valleys Gateway	4	3	7	5	5	10	16
9	-	-	-	-	-	-	-
10	-	-	-	-	-	-	-
11	-	-	-	-	-	-	-
12	-	-	-	-	-	-	-
13	-	-	-	-	-	-	-
14	-	-	-	-	-	-	-
15	-	-	-	-	-	-	-
16	-	-	-	-	-	-	-
17	-	-	-	-	-	-	-
18	-	-	-	-	-	-	-
19	-	-	-	-	-	-	-
20	-	-	-	-	-	-	-

Headline 15-year Affordable Housing Need Estimate

Table 4: Estimated annual overall additional affordable housing need by HMA and tenure (net need) over the 15 years of the LHMA

Table 4 provides the additional affordable housing need estimates on the following basis:

*at HMA level

*by tenure (intermediate housing and social rent)

*annual estimate for the 15 years of the LHMA period

*the affordable housing need estimates are a combination of the additional estimates from table 1 (net estimates) and table 3.

(no further allowance has been made for supply and turnover of existing stock as it becomes less accurate to predict beyond year 5)

	Average annual estimates			15-year estimates		
	(a)	(b)	(c)			
HMA	Social rent	Intermediate rent and LCHO	Affordable Housing	Social rent	Intermediate rent and LCHO	Affordable Housing
			(c) = (a) + (b)			(c) = (a) + (b)
Additional housing need estimates by tenure	60	50	110	897	747	1,644
Bridgend and Surrounding	11	18	29	160	275	435
Garw Valley	2	1	3	23	15	38
Llynfi Valley	7	7	14	104	106	210
Ogmore Valley	2	1	3	24	17	41
Pencoed and Heol Y Cyw	5	5	10	70	80	150
Porthcawl	11	7	18	164	100	264
Pyle, Kenfig and Cornelly	15	7	22	229	106	335
Valleys Gateway	8	3	11	122	48	170
9	-	-	-	-	-	-
10	-	-	-	-	-	-
11	-	-	-	-	-	-
12	-	-	-	-	-	-
13	-	-	-	-	-	-
14	-	-	-	-	-	-
15	-	-	-	-	-	-
16	-	-	-	-	-	-

17	-	-	-	-	-	-
18	-	-	-	-	-	-
19	-	-	-	-	-	-
20	-	-	-	-	-	-

Data items / Key assumptions

	Basis	2022/23	2023/24	2024/25	2025/26	2026/27
Change in income growth	Default	2.33%	2.76%	2.84%	2.77%	3.58%
Change in house prices	Default	-1.12%	-5.67%	1.14%	3.43%	3.59%
Change in private rent prices	Default	5.04%	1.77%	1.67%	1.86%	2.49%
Change in income distribution growth	Greater Ineq	1.00%	1.00%	1.00%	1.00%	1.00%

Number of years to clear existing unmet need	5 years
Market housing affordability criteria	25%
Social rent affordability criteria	35%

Data item	Data Sources	Basis of the data
Income data by HMA	Paycheck	2022
House price paid data by HMA	Land Registry Data	Calendar year
Rent prices	Rent Officers Wales	Financial year
Household projection basis	Lower Variant	

Percentage of households considered for owner occupier tenure that go on to buy	50%
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HMA assumptions

HMA	FTB property price	FTB property value to income ratio	Min. income for intermediate rent	Max. income for intermediate rent
Bridgend and Surrounding	£ 170,079	4.3	£ 20,716	£ 32,150
Garw Valley	£ 87,808	4.3	£ 15,787	£ 23,939
Llynfi Valley	£ 96,114	4.3	£ 16,800	£ 26,200
Ogmore Valley	£ 92,950	4.3	£ 16,361	£ 24,012
Pencoed and Heol Y Cyw	£ 175,320	4.3	£ 21,491	£ 31,117
Porthcawl	£ 197,766	4.3	£ 22,767	£ 34,664
Pyle, Kenfig and Cornelly	£ 137,448	4.3	£ 19,762	£ 29,608
Valleys Gateway	£ 138,436	4.3	£ 19,463	£ 29,580
9		4.3		
10		4.3		
11		4.3		
12		4.3		
13		4.3		
14		4.3		
15		4.3		
16		4.3		
17		4.3		
18		4.3		
19		4.3		
20		4.3		

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	NON-DOMESTIC RATES: DISCRETIONARY RELIEF: RETAIL, LEISURE AND HOSPITALITY RATES RELIEF SCHEME 2024-25
Report Owner / Corporate Director:	CHIEF OFFICER – FINANCE, HOUSING AND CHANGE
Responsible Officer:	HELEN RODGERS REVENUES MANAGER
Policy Framework and Procedure Rules:	Local authorities can use their discretion to grant rates relief on all or part of the amount of non-domestic rates payable to eligible businesses under section 47 of the Local Government Finance Act 1988 (the Act). The Welsh Government will then reimburse authorities for any relief that is provided.
Executive Summary:	The purpose of the report is to seek approval from Cabinet to adopt the Welsh Government’s Retail, Leisure and Hospitality Rates Relief Scheme 2024-25. The Welsh Government will provide grant funding to local authorities in Wales to deliver the Retail, Leisure and Hospitality Rates Relief scheme to eligible businesses for 2024-25. The scheme aims to provide support for eligible occupied properties by offering a discount of 40% on non-domestic rates bills for such properties.

1. Purpose of Report

- 1.1 The purpose of the report is to seek approval from Cabinet to adopt the Welsh Government’s Retail, Leisure and Hospitality Rates Relief Scheme 2024-25.

2. Background

- 2.1 The Welsh Government has announced an extension of the Retail, Leisure and Hospitality Rates Relief Scheme for 2024-25 to support eligible occupied properties by offering a discount of 40% on non-domestic rates

bills for such properties within the retail, leisure and hospitality sector. The scheme will apply to all eligible businesses, however, the relief will be subject to a cap on the amount each business can claim across Wales. The total amount of relief available is £110,000 across all properties occupied by the same business. All businesses are required to make a declaration that the amount of relief they are seeking across Wales does not exceed this cap, when applying to individual local authorities. They will also need to declare that they shall not receive more than £315,000 in total of Minimal Financial Assistance (MFA), as defined in the Subsidy Control Act 2022, within a three-year period (financial years 2022-23 to 2024-25 inclusive). The Scheme sets out the various categories of retail, leisure and hospitality premises that will benefit from relief. These are detailed in **Appendix A** of the report, but broadly the premises included are occupied shops, pubs and restaurants, gyms, performance venues and hotels across Wales.

- 2.2 The Scheme will be administered by the Council as a 'reimbursing local authority' that uses discretionary relief powers (under section 47 of the Local Government Finance Act 1988). It will be for individual local billing authorities to decide to grant relief under section 47, but Welsh Government will reimburse local authorities for the relief that is provided.
- 2.3 The Welsh Government will provide 40% rates relief for eligible properties for the 2024-25 financial year.
- 2.4 The Retail, Leisure and Hospitality Rates Relief Scheme for 2024-25 will run alongside the Small Business Rates Relief Scheme. Small Business Rates Relief is awarded automatically on a maximum of 2 occupied properties in the same business name in any local authority area where the property has a rateable value under £12,000.
- 2.5 It is estimated that, due to the limit of £110,000 per business across Wales, there will be in the region of 888 eligible ratepayers across the borough that could potentially benefit from having to pay only 40% of their rates bill for the 2024-25 financial year under this Scheme.

3. Current situation / proposal

- 3.1 The Council can elect to adopt the Scheme but does not have discretion over any elements of the Scheme. It is proposed that the Council adopts the Scheme for 2024-25 by making the appropriate determination and decision, as required by Sections 47(1) (a) and 47(3) respectively of the Local Government Finance Act 1988.
- 3.2 Full details of the Retail, Leisure and Hospitality Rates Relief Scheme for 2024-25 and the guidance on the application of the Scheme have been received from Welsh Government. Due to the limit of £110,000 per business throughout Wales and the £315,000 in total of MFA over three years including 2023-24, Welsh Government have stated that this scheme will need to be administered on an application basis only. If this Council adopts the Scheme,

application forms will be made available on Bridgend County Borough Council's website for all qualifying ratepayers to apply. It is proposed that, upon receipt of a valid application form, the decision to award relief be made by the Revenues Manager providing all terms of the Scheme are met.

- 3.3 The Chief Executive has delegated power under the Council's Scheme of Delegation of Functions to award relief to all qualifying businesses that may be eligible in accordance with the Non-domestic Rates Relief Scheme, following receipt of the information requested by Welsh Government.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

- 5.1 The Act provides the basis for driving a different kind of public service in Wales, with five ways of working to guide how public services should work to deliver for people. The well-being objectives are designed to complement each other and are part of an integrated way of working to improve well-being for the people of Bridgend. It is considered that there will be no significant or unacceptable impacts upon the achievement of the well-being goals or objectives as a result of this report.

6. Climate Change Implications

- 6.1 There are no climate change implications arising from this report.

7 Safeguarding and Corporate Parent Implications

- 7.1 There are no safeguarding and corporate parent implications arising from this report.

8. Financial Implications

- 8.1 Welsh Government has provided the Council with an estimated funding allocation of £3,029,000 towards the cost of the relief, along with funding of £17,690 towards the cost of administering the scheme. As these figures are based upon estimates of the likely number of ratepayers eligible for support, they are subject to change.

9. Recommendation

- 9.1 It is recommended that Cabinet:

- adopts the Non-Domestic Rates Retail, Leisure and Hospitality Rates Relief Scheme for 2024-25 as detailed within **Appendix A**.

Background documents:

None

Resolution

(a) The Council determines that, unless hereditaments are excepted under (b) below, Section 47(1)(a) (discretionary relief) of the Local Government Finance Act 1988 will apply as regards the hereditaments described in 'The Scheme' in accordance with the rules described in relation to those hereditaments.

It is reasonable for the Council to make this decision having regard to the interests of persons liable to pay business rates set by the Council.

(b) Relief is not available under this resolution in respect of any hereditament which is occupied by -

- the Welsh Ministers, a Minister of the Crown or government department,
- any public authority (including any local authority),
- the holder of any public office, or
- the Crown

(c) The Council decides, under Section 47(3) of the Local Government Finance Act 1988, that during the billing year 2024-25 'The Scheme' shall apply to the hereditaments described..

The Scheme to be Adopted

Introduction

This relief is aimed at businesses and other ratepayers in Wales in the retail, leisure and hospitality sectors, for example shops, pubs and restaurants, gyms, performance venues and hotels. The aim of the relief is to support these sectors to improve their chances of recovery from the economic challenges which have affected them in recent years.

The Welsh Government will provide grant funding to all 22 local authorities in Wales to deliver the Retail, Leisure and Hospitality Rates Relief scheme to eligible businesses for 2024-25. The scheme aims to provide support for eligible occupied properties by offering a discount of 40% on non-domestic rates bills for such properties. The scheme will apply to all eligible businesses, however the relief will be subject to a cap in the amount each business can claim across Wales. The total amount of relief available is £110,000 across all properties occupied by the same business. All businesses are required to make a declaration when applying to individual local authorities, confirming that the amount of relief they are seeking across Wales does not exceed this cap.

Properties that will benefit from this relief will be occupied retail, leisure and hospitality properties – such as shops, pubs and restaurants, gyms, performance venues and hotels across Wales. More detailed eligibility criteria and exceptions to the relief are set out below.

Relief should be granted to each eligible business as a reduction to its rates bill based on occupation between 1 April 2024 and 31 March 2025. It is intended that, for the purposes

of this scheme, retail properties such as 'shops, restaurants, cafes and drinking establishments' will mean the following (subject to the other criteria in this guidance).

Hereditaments that are being used for the sale of goods to visiting members of the public

- Shops (such as florists, bakers, butchers, grocers, greengrocers, jewellers, stationers, off-licences, newsagents, hardware stores, supermarkets, etc)
- Charity shops
- Opticians
- Pharmacies
- Post offices
- Furnishing shops or display rooms (such as carpet shops, double-glazing, garage doors)
- Car or caravan showrooms
- Second hand car lots
- Markets
- Petrol stations
- Garden centres
- Art galleries (where art is for sale or hire)

Hereditaments that are being used for the provision of the following services to visiting members of the public

- Hair and beauty services
- Shoe repairs or key cutting
- Travel agents
- Ticket offices, eg. for theatre
- Dry cleaners
- Launderettes
- PC, TV or domestic appliance repair
- Funeral directors
- Photo processing
- DVD or video rentals
- Tool hire
- Car hire
- Estate and letting agents

Hereditaments that are being used for the sale of food and / or drink to visiting members of the public

- Restaurants
- Drive-through or drive-in restaurants
- Takeaways
- Sandwich shops
- Cafés
- Coffee shops
- Pubs
- Bars or Wine Bars

We consider assembly and leisure to mean the following.

Hereditaments that are being used for the provision of sport, leisure and facilities to visiting members of the public (including for the viewing of such activities) and for the assembly of visiting members of the public

- Sports grounds and clubs
- Sport and leisure facilities
- Gyms
- Tourist attractions
- Museums and art galleries
- Stately homes and historic houses
- Theatres
- Live Music Venues
- Cinemas
- Nightclubs

Hereditaments that are being used for the assembly of visiting members of the public

- Public halls
- Clubhouses, clubs and institutions

We consider hotels, guest & boarding premises and self-catering accommodation to mean the following.

Hereditaments where the non-domestic part is being used for the provision of living accommodation as a business

- Hotels, Guest and Boarding Houses,
- Holiday homes,
- Caravan parks and sites

Other considerations

To qualify for the relief, the hereditament should be wholly or mainly used for the qualifying purposes. In a similar way to other reliefs, this is a test on use rather than occupation. Therefore, hereditaments that are occupied, but not wholly or mainly used for the qualifying purpose, will not qualify for the relief. For the avoidance of doubt, hereditaments which closed temporarily due to the government's advice on Covid-19 should be treated as occupied for the purposes of this relief.

The above list is not intended to be exhaustive as it would be impossible to list all the many and varied retail, leisure and hospitality uses that exist. There will also be mixed uses. However, it is intended to be a guide for local authorities as to the types of uses that the Welsh Government considers for this purpose to be eligible for relief. Local authorities should determine for themselves whether particular properties not listed are broadly similar in nature to those above and, if so, to consider them eligible for the relief. Conversely, properties that are not broadly similar in nature to those listed above should not be eligible for the relief.

The grant of the relief is discretionary. Should local authorities decide to exercise their discretion not to apply the relief to eligible businesses, they may wish to consider taking their own legal advice upon any potential consequential legal issues which might arise from such a decision and on a case by case basis.

Businesses may view that they have not faced substantial impacts from the recent economic pressures and as such may be inclined to not apply for the relief.

Types of hereditaments that are not considered to be eligible for Retail, Leisure and Hospitality Rates Relief

The following list sets out the types of uses that the Welsh Government does not consider to be retail, leisure or hospitality use for the purpose of this relief and which would not be deemed eligible for the relief. However, it will be for local authorities to determine if hereditaments are similar in nature to those listed and if they would not be eligible for relief under the scheme.

Hereditaments that are being used wholly or mainly for the provision of the following services to visiting members of the public

- Financial services (eg. banks, building societies, cash points, ATMs, bureaux de change, payday lenders, betting shops, pawnbrokers)
- Medical services (eg. vets, dentists, doctors, osteopaths, chiropractors)
- Professional services (eg. solicitors, accountants, insurance agents, financial advisers, tutors)
- Post Office sorting offices
- Day nurseries
- Kennels and catteries
- Casinos and gambling clubs
- Show homes and marketing suites
- Employment agencies

Hereditaments that are not reasonably accessible to visiting members of the public

If a hereditament is not usually reasonably accessible to visiting members of the public, it will be ineligible for relief under the scheme even if there is ancillary use of the hereditament that might be considered to fall within the descriptions listed under *Which properties will benefit from relief?*

Hereditaments that are not occupied

Properties that are not occupied on 1 April 2024 should be excluded from this relief. However, under the mandatory Empty Property Rates Relief, empty properties will receive a 100% reduction in rates for the first three months (and in certain cases, six months) of being empty.

Hereditaments that are owned, rented or managed by a local authority

Hereditaments owned, rented or managed by a local authority, such as visitor centres, tourist information shops and council-run coffee shops or gift shops attached to historic buildings, are exempt from this scheme.

How much relief will be available?

The total amount of government funded relief available for each property under this scheme for 2024-25 is 40% of the relevant bill. This is subject to a cap of £110,000 per business across all their properties in Wales.

The relief should be applied to the net bill remaining after mandatory reliefs (including discretionary elements that are fully or partly local authority funded) and other discretionary reliefs funded by section 31 grants have been applied (excluding those where local authorities have used their wider discretionary relief powers introduced by the Localism Act 2011, which are not funded by section 31 grants). The reliefs to be applied before Retail, Leisure and Hospitality Rates Relief include categories of discretionary relief available prior to the Localism Act 2011 (eg rates relief for charities, community amateur sports clubs, non-profit organisations, hardship, empty properties). Local authorities may use their wider discretionary powers to offer further discounts outside this scheme or additional relief to hereditaments within the scheme. Where a local authority applies a locally funded relief under section 47 of the Local Government Finance Act 1988, this should be applied after the Retail, Leisure and Hospitality Rates Relief.

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

Amount of relief to be granted = $V \times 0.4$, where

V is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and any other discretionary reliefs (excluding those where local authorities have used their discretionary relief powers introduced by the Localism Act 2011, which are not funded by section 31 grants).

This should be calculated ignoring any prior-year adjustments in liabilities which fall to be liable on the day.

Businesses that occupy more than one property will be entitled to Retail, Leisure and Hospitality Rates Relief for each of their eligible properties, within the cap of £110,000 per business across Wales.

A business with a single property with a remaining liability (after reliefs) greater than £275,000 can use the entire allocation of relief. No other properties owned by that business will be eligible for the scheme.

Retail, leisure and hospitality properties which are excluded from Small Business Rates Relief due to the multiple occupation rule are eligible for this relief scheme, subject to the cap being applied.

Changes to existing hereditaments, including change in occupier

Empty properties becoming occupied after 1 April 2024 will qualify for this relief from the time of occupation.

If there is a change in occupier part way through the financial year, after relief has already been provided to the hereditament, the new occupier will qualify for the relief if they operate in the retail, leisure or hospitality sectors, on a pro-rata basis. This will be calculated based on the remaining days of occupation using the formula used in the section titled *How much relief will be available?*

The discount should be applied on a day-to-day basis using the formula set out above. A new hereditament created as a result of a split or merger during the financial year, or where there is a change of use, should be considered afresh for the discount on that day.

The Cash Cap and Subsidy Control

No ratepayer can, in any circumstances, exceed the £110,000 cash cap across all of their hereditaments in Wales. Where a ratepayer has a qualifying connection with another ratepayer, those ratepayers should be considered as one ratepayer for the purposes of the cash caps. A ratepayer shall be treated as having a qualifying connection with another where:

- both ratepayers are companies and one is a subsidiary of the other, or both are subsidiaries of the same company; or
- only one ratepayer is a company and the other ratepayer has such an interest in that company as would, if the other ratepayer were a company, result in its being the holding company of the other.

As of 4 January 2023, the new UK subsidy control regime commenced with the coming into force of the Subsidy Control Act 2022. The Retail, Leisure and Hospitality Rates Relief scheme is likely to be a subsidy under the new regime. Any relief provided by local authorities under this scheme will need to comply with the UK's domestic and international subsidy control obligations.

To the extent that a local authority is seeking to provide relief that falls below the Minimal Financial Assistance (MFA) thresholds, the Subsidy Control Act 2022 allows an economic actor (eg a holding company and its subsidiaries) to receive up to £315,000 in a 3-year period (consisting of the 2024-25 year and the two previous financial years). Retail, Leisure and Hospitality Rates Relief schemes in Wales prior to 2023-24 were not provided as a subsidy. Local authorities should ask the ratepayers, on a self-assessment basis, to declare as part of their application for RLHRR that they are not in breach of the cash cap or MFA limit.

It is the responsibility of the local authority to comply with all relevant subsidy control provisions, including MFA procedure and transparency requirements. More information is available in the UK statutory subsidy control [guidance](#) from the Department for Business, Energy and Industrial Strategy.

For further advice, the Subsidy Control Unit at the Welsh Government can be contacted at:

Subsidy Control Unit
Welsh Government
Cathays Park
Cardiff
CF10 3NQ
Email: SubsidyControlUnit@gov.wales

Agenda Item 8

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	PROPOSED USE OF LAND TRANSACTION TRANSFER PROTOCOL WITH CARDIFF CAPITAL REGION FOR LAND AT BRYNMENYN & BRYNCETHIN
Report Owner / Corporate Director:	CORPORATE DIRECTOR COMMUNITIES
Responsible Officer:	JANINE NIGHTINGALE CORPORATE DIRECTOR COMMUNITIES
Policy Framework and Procedure Rules:	The transfer of land via an options agreement to the Cardiff Capital Region City Deal (CCR), at a jointly agreed red book valuation will be undertaken under the provision of the Land Transaction Transfer Protocol.
Executive Summary:	<p>This report summarises the proposal to use an Options Agreement arrangement with the Cardiff Capital Region City Deal (CCR), under the Land Transaction Transfer Protocol. This will enable CCR to have an option to purchase surplus local authority land at Brynmenyn and Bryncethin, subject to conditions and red book valuation.</p> <p>The report outlines the conditions that are required to be satisfied to protect the Council's interests , including that a joint agreed Red Book valuation is used for the transfer, based on a planning permission being determined favourable, that the land remains in public sector ownership, can only be used for the intended planning purpose, that the land is offered back to the Council at the value it was transferred if the project does not proceed and that all finances are in place for the transfer.</p> <p>The report recommends delegating authority to Corporate Director – Communities, in consultation with the Chief Officer - Legal & Regulatory Services, HR & Corporate Policy and the Chief Officer, Finance, Housing & Change, to draft & execute the agreement when all conditions are duly met.</p>

1. Purpose of Report

- 1.1 The report will outline the proposed use of an Options Agreement arrangement with the Cardiff Capital Region City Deal (CCR), under the Land Transaction Transfer Protocol. If agreed, this will enable CCR to have an option to purchase surplus local authority owned land at Brynmenyn and Bryncethin, subject to conditions and red book land valuation.

2. Background

- 2.1 In September 2023, the Cabinet made the difficult decision to withdraw from the Hybont Green Hydrogen Project with CCR, Welsh Government and Marubeni Europower Limited (MEL). This was due to the Council's challenging Medium Term Financial Strategy (MTFS) and inability to meet the significant financial commitments required to complete due diligence, including financial, technical and legal also an inability to meet the timescale for the project. It was agreed by Cabinet that the Council would continue dialogue with partners including Welsh Government and for them to identify an alternative route forward with MEL.
- 2.2 Since the withdrawal of BCBC from the project, CCR is now considering being a key partner and investor in the project and is currently applying the rigours of due diligence and reviewing the business case and investment potential. CCR's interest in this green hydrogen project is borne from the likelihood it will be a key part of the energy mix, as they aim to decarbonise the Southeast Wales industrial economy and it could also provide investment and job creation in the local economy.
- 2.3 The project will be subject to several variables being in place such as planning permission and operators licensing and permitting, these are discussed from paragraph 2.7 below. However, what is key, is the availability of investment from CCR to make the project deliverable and the appropriate land on which to develop the project itself. The availability of land is the subject of this Cabinet Report and the use of the Land Transaction Transfer Protocol (LTTP) to enable an Options Agreement to be put in place to enable CCR to purchase the surplus BCBC land, subject to several conditions being met.
- 2.4 Before the use of the LTTP is examined in detail, it is considered beneficial to outline the planning, operating licences and permitting processes that are also needed to be in place to allow this project to progress.

Planning Permission

- 2.5 The development of any facilities for the Hybont Project, including a solar array at the Claypits in Bryncethin and the Green Hydrogen production and a filling station at land at Brynmenyn, will require planning consent. The Local Planning Authority, part of BCBC, would determine an application of this scale by presenting it to the Development Control Committee (DCC), made up of cross party elected members. This committee will receive a detailed Planning Officers report with a recommendation to either grant or refuse permission, based on whether the use of

the land is deemed appropriate. The development control committee can only make decision on land use and cannot make decisions on areas such as the safety of the production or operations. These are subject to separate licence and permit agreements. It is likely that this Hybont Project planning application will be determined at a Special Planning Committee in late April, subject to all the appropriate detailed information being submitted by the applicant.

- 2.6 The Welsh Government has also reserved the right to “Call In” the application for a decision to be made by Ministers. Once the planning officers report is completed with a recommendation in place, this will be sent to Planning and Environmental Decisions Wales (PEDW) Officers for consideration. If they do not wish to “call in” the application, then the DCC can continue to determine the application, or grant any permission subject to confirmation from PEDW that they do not wish to “call in”. However, should they wish to “call in” the application then it will be determined nationally by PEDW and Welsh Government and their decision will then override any decision that has been taken locally.

Licences and Permits

- 2.7 Hydrogen production, storage, and transportation is very heavily regulated in the UK and the Hybont Project will require approval and a wide range of permits and Licences in place, to be able to safely operate, produce and store green hydrogen for the project. The range of statutory regulators that are involved in granting these permits and licences include the Health & Safety Executive (HSE), Natural Resources Wales (NRW), The Coal Authority, Welsh Water and the National Grid.
- 2.8 The Council is the Hazardous Substances Authority and as such has responsibility for granting a Control of Hazardous Substance License. However, the Council’s role is administrative in nature, in that it is for the two statutory consultees, HSE and NRW, to agree if it is appropriate for a hazardous substance licence to be approved. Only when the agreement from these two regulators is in place, will the Development Control Committee, grant this licence.
- 2.9 The operating team within MEL are working through the other permits and licences that will be required for the Hybont Project currently with the appropriate statutory regulators. These are not the responsibility of the Council and do not affect our ability to continue with the LTTP. Whilst not an exhaustive list, the following sets out major permits, licences, or permissions that will be required: -
- **Coal Authority Permit from the Coal Authority** – This permit allows work to be undertaken on land that is considered as a potential coal risk. It requires submission of risk assessments and method statements to ensure compliance with Coal Authority requirements.
 - **Control of Major Accident Hazards Consent (COMAH) from the Health and Safety Executive** – This consent is a set of legal requirements that aim to prevent and mitigate the effects of major accidents that involve hazardous substances. The regulations apply to all businesses that handle or store large quantities of

hazardous substances in the UK. The regulations require businesses to assess the risks associated with their activities and to take measures to prevent or reduce the likelihood of a major accident occurring. Businesses are also required to have an emergency response plan in place in case of a major accident. It is broken down into two tiers: Upper Tier: 50 tonnes and Lower Tier 5 tonnes. The HyBont facility is not expected to require classification as either a lower-tier or upper-tier COMAH site.

- **Environmental Permit from Natural Resources Wales** – This permit authorises an industrial facility operator to carry out activities that have the potential to cause pollution or harm to the environment or increase flood risk. The purpose of an environmental permit is to ensure that the activities are carried out in a way that protects the environment and human health and it will set out specific conditions that the operator must comply with such as emission limits, monitoring requirements and reporting obligations.
- **Trade Effluent Consent from Welsh Water** – This is legal permission that allows the hydrogen production site to discharge liquid waste or effluent from their premises into the public sewer system. The water company will assess the application and set appropriate limits and conditions for the discharge of the effluent to ensure discharges are appropriate.
- **Permission to work within Vicinity of Water Main from Welsh Water** – This permission granted by Welsh Water will permit construction, maintenance, or repair work to be carried out near their water mains or infrastructure to ensure protection of assets.
- **NGED Grid Connection Agreement G99 from National Grid** - This agreement is required for power generators to connect on the National Grid Electricity Distribution network as per Electricity Networks Association Engineering Recommendation G99.

3. Current situation / proposal

- 3.1 We now turn to the subject of this Cabinet Report, which is the proposed use of an Options Agreement arrangement with the Cardiff Capital Region City Deal (CCR), under the Land Transaction Transfer Protocol. If agreed, this will enable CCR to have an option to purchase surplus local authority owned land, subject to conditions and an agreed red book valuation.
- 3.1 The Land Transaction Transfer Protocol is considered best practice guidance for the disposal and transfer, of land and property assets between publicly funded bodies in Wales that are identified as “surplus.” It is the responsibility of the relevant public body to determine whether the land is “surplus,” but it will generally be the case if the

land does not meet any of the following criteria:

- it is currently used/required to deliver BCBC's operational functions.
- there is a clearly evidenced plan to use the land to deliver BCBC's future operational functions.
- it is held for commercial purposes and/or is integral to continuity of service delivery.
- the land is vital for business contingency.

3.3 The two areas of land subject to this LTTP are, first a 17.47 hectares (43.18 acre) site of rough grazing land at Bryncethin, known locally as the Clay Pits , with its boundary shown as red in Appendix A. The second area is a 1.72 hectares (4.24 acres) site of undeveloped and unmanaged land with a Local Development Plan industrial use designation and is immediately adjacent to the Brynmenyn Industrial Estate, with its boundary shown as red at Appendix B. Both sites are in BCBC ownership, are vacant, have no plans for future development or business continuity and are declared surplus. For these reasons the use of the Protocol for the purposes of a Options Agreement for a proposed disposal of the land to CCR is considered an acceptable mechanism legally for proceeding.

3.4 There are a number of key principles that need to be followed with the Protocol. The first is that the organisations involved, that is the Council and CCR, should commission an independent valuation report to settle the price to be paid and to value assets at market value, in accordance with Royal Institute of Chartered Surveyors (RICS) standards. The Council will agree that the value of the land will be determined by the red book protocol. In simple terms, a Red Book valuation involves a RICS Registered Valuer assessing the land and providing a formal report of the current market value of the property. The current estimated value of the two parcels of land with the benefit of planning permission being in place, is circa £1 million. The Option Agreement would need to contain this valuation mechanism whereby both parties jointly agree the valuation in accordance with the Protocol after the last of the conditions has been satisfied and the Option notice has been served.

3.5 Another principle of the LTTP is that it should be used for the transfer of land/property to meet an operational requirement and not a speculative purpose. The Protocol states that, if a public body identifies land as being surplus to requirements, best practice requires that property which is formally declared as surplus should be disposed of as expeditiously as possible. However, it does acknowledge that consideration should be given to the longer- term in respect of planning use and the fact that the longer-term benefits may outweigh the costs savings of a quick turnaround. In this case, the proposed Option Agreement falls into the latter category

where the land will have a considerably higher value once planning permission is obtained. It is proposed that the Option Agreement will be conditional upon planning permission for the Hydrogen Demonstrator Project being determined favourably and that it would only be exercised should this be the case. This also supports the Protocol's condition that the land will be used for an operational requirement, rather than being acquired with no specific purpose in mind.

- 3.6 However, it should be recognised that once the land has been transferred to CCR there is no restriction on the land that prevents it from being used for any other purpose and there would be no obligation on CCR to build out in accordance with the planning permission. The Council will impose such a restriction on use in the Option Agreement and it is proposed that this includes a restriction that the land can only be used for the intended purpose of the planning consent. This may impact on the market value, but it does protect the interests of the Council. In addition, there will be a provision in the Option Agreement that should the project not proceed, or the land no longer be required, then it must be offered back to the Council at the value at which it was transferred. This is to ensure that the land stays within public sector ownership and is not passed onto a private sector user.
- 3.7 Internal transfers of land within the public sector, should not normally involve claw-back or overage but it may be appropriate in certain circumstances to include a clawback provision in transfers between public bodies outside the same accounting umbrella. The Protocol refers to the UK Government's Cabinet Office which recommends that unrestricted market value transfers would not normally include a requirement for any clawback provision from one public sector body to another. This is not the case with the proposed option agreement with CCR, as there will be conditions that protect the Council's interest with regard to the land remaining within public sector ownership, the use of the land being only for the purposes of the planning consent and that the land value will be based on the land having an approved planning consent in place. Therefore, the Council will reserve the right to include an overage or claw back provision in the Options Agreement, should it be deemed necessary at the time of entering the Agreement, to protect its interests.
- 3.8 A further provision in the Protocol, is that there should be an approved business case in place for the land acquisition with the confirmed availability of funding. A Strategic Outline Case ("SOC") was presented to the CCR investment panel in November 2023, which was supportive of the recommendation for a proposed equity investment from CCR in return for a 15% shareholder stake in the project to deliver the Hydrogen Demonstrator Project. Following on from that approval, there will now be a more detailed analysis by CCR, in order to develop a Full Business Case, which is intended to be approved at the first meeting of the newly formed Corporate Joint Committee in May 2024. In addition, Department of Energy Security and Net Zero (DESNZ) funding from UK Government has been awarded to the project, which enables the green

hydrogen to be distributed at a viable price to off-takers and thus removes the risk that was outlined in the SOC.

- 3.9 There are still funding risks associated with the project with regard to specific legal and commercial considerations, aligned to the involvement of the Japanese Government through its New Energy and Industrial Technology Development Organisation (“NEDO”) and that, if there is a material delay in planning permission being obtained or changes are necessitated to the scheme then this could impact on the finance ask. In these circumstances, if planning permission is not granted within the timescales proposed, there is a risk that funding at the level required for the Project to proceed from NEDO may not be achieved. If this was the case, and the project ceased, then dependent on timeframe, either the land Option Agreement would not be exercised from the Council to CCR or the condition in the Options Agreement for the land to be passed back to the Council would be exercised.
- 3.10 The final point of note from the protocol is that it is recommended that an acquiring organisation ensures they have the power to hold property assets prior to engaging and that all public bodies must ensure that every action taken is within its powers or it may be challenged as unlawful. The Cardiff City Region City Deal is transferring into a Corporate Joint Committee (CJC) on the 1st of April 2024 and will have the power to hold property assets, so this will not present an issue.
- 3.11 It is noted from the narrative above that the Land Transaction Transfer Protocol is a robust mechanism for allowing surplus land holdings to move from one public sector body to another, at an agreed valuation. It is clear, that there are a number of conditions that will be needed within the Options Agreement to protect the interests of the Council. Including in summary, the following: -
- That a jointly agreed Red Book valuation is used for the transfer, based on a planning permission being determined favourable, to ensure best consideration for the land.
 - That the land remains in public sector ownership and cannot be transferred or disposed of to a third party or private sector organisation.
 - That the land is only used for the intended purpose of the planning consent.
 - That should the project not proceed, the land will be offered back to the Council at the value at which it was transferred under the protocol.
 - That agreement in principle can be given to the option agreement, subject to a Full Business Case (FBC) approval from CJC in May 2024 and confirmation that funding is in place for the land transfer at the jointly agreed red book valuation.

- 3.12 Once the Option Agreement is in place, the transfer of the land can only take place once CCR/CJC have served an Option Notice on the Council, the timing of which is at the discretion of the CCR/CJC, unless a condition is agreed regarding the timescale for the service of the Option Notice.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty, and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services, and functions. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

- 5.1 The Well-being of Future Generations (Wales) Act 2015 Assessment based on the 5 ways of working and any requisite mitigating measures have been set out below: -
- *Long-term:* The proposed Hybont project was intended to test a new green hydrogen technology for delivering net zero carbon energy, as a key part of the Council's 2030 Net Zero Carbon Strategy. It is also part of the UK and Welsh Government vision for a hydrogen energy economy and would contribute to the Government target of producing 5GW of hydrogen by 2030. The transfer of land for the project will contribute to this national agenda.
 - *Prevention:* The transfer of the land at best consideration for the green hydrogen project would deliver carbon footprint reductions, preventing further harm to the environment and protecting the environment for future generations. The 2030 strategy will now be reviewed to assess the impact of this decision.
 - *Integration:* The transfer of the land for the project, should planning permission be secured, would bring the development of a solar array and a supply of green electricity to the land adjacent to the Council's Bryncethin Depot. There will be opportunities for the Council to learn lessons from this best practice and look to further its own environmental objectives with regard to renewable energy.
 - *Collaboration:* The transfer would be undertaken through the Land Transaction Transfer Protocol with our public sector partners Cardiff Capital Region City Deal (CCR), who will shortly become a Corporate Joint Committee (CJC). This will ensure that best consideration and value is achieved for the land and that it remains within public sector ownership.
 - *Involvement:* The long-term future direction of the project will be dependent on the continued collaboration of Welsh Government and the CJC with Marubeni Europower Limited, now that BCBC can no longer be involved. However, the transfer of the land to our public sector partners will ensure that best consideration

and value is achieved for the land and that it remains within public sector ownership.

6. Climate Change Implications

- 6.1 The proposed transfer of the land to CCR/CJC is for a use that will bring forward the generation of green electricity via a proposed solar array on the Clay Pits site and the production of green hydrogen on the site at Brynmenyn. Both parts of this project, if planning consent is approved and all the statutory licences and permits agreed, will be seen to benefit the climate change agenda.

7. Safeguarding and Corporate Parent Implications

- 7.1 There are no safeguarding or corporate parent implications arising from this report.

8. Financial Implications

- 8.1 There are two areas for financial consideration, arising from this report. The first is the revenue costs associated with preparing the joint valuation report and the options agreement. These will be funded from a budget allocation within Corporate Landlord for asset disposals.
- 8.2 The second area is the expected capital receipt for the value of the land, currently estimated at circa £1 million, with the benefit of a favourable planning permission in place. As set out above, this must be jointly agreed and prepared via an independent Red Book Valuation as described in paragraph 3.4 above. The Options Agreement will not be exercised until all the conditions as set out in paragraph 3.11 above are satisfied. In addition, should the land not be required for the project, then it will be offered back to the Council at the value at which it was transferred. This will protect the Council's financial interests moving forward and ensure that the land remains in public sector ownership. It is also recommended that any capital receipt received by the Council is afforded a ring-fenced protection until such time as it is clear that the project will proceed, to ensure that there are funds available should the land be returned to the Council's ownership.

9. Recommendations

- 9.1 It is recommended that Cabinet:
1. Note the contents of this report and the statutory requirements for planning consent and various licences and permits, that sit outside of the Land Transaction Transfer Protocol.
 2. Delegate authority to Corporate Director – Communities, in consultation with the Chief Officer - Legal & Regulatory Services, HR & Corporate Policy and the Chief Officer, Finance, Housing & Change, to draft and enter into the Option Agreement with the CCR/CJC based on the principles set out in this report, and agree the valuation of the land and conditions.

3. Agree that any capital receipt received by the Council, is afforded a ring-fenced protection until such time as it is clear that the project will proceed, to ensure that there are funds available should the land be returned to the Councils ownership.
4. Agree that a subsequent report will be brought back to Cabinet should the Option Agreement or project not proceed, in order the land can be returned to the Council for the agree value at which it was disposed and that a decision on the future of the two parcels of land can be agreed.

Background documents

19th September 2023 Cabinet Paper – Hybont Project Gateway Review

14th June 2022 Cabinet Paper – Bridgend Net Zero Carbon – Hydrogen Technology Demonstrator

Appendix A – Land at the Clay Pits in Bryncethin



Appendix B – Land at Brynmenyn

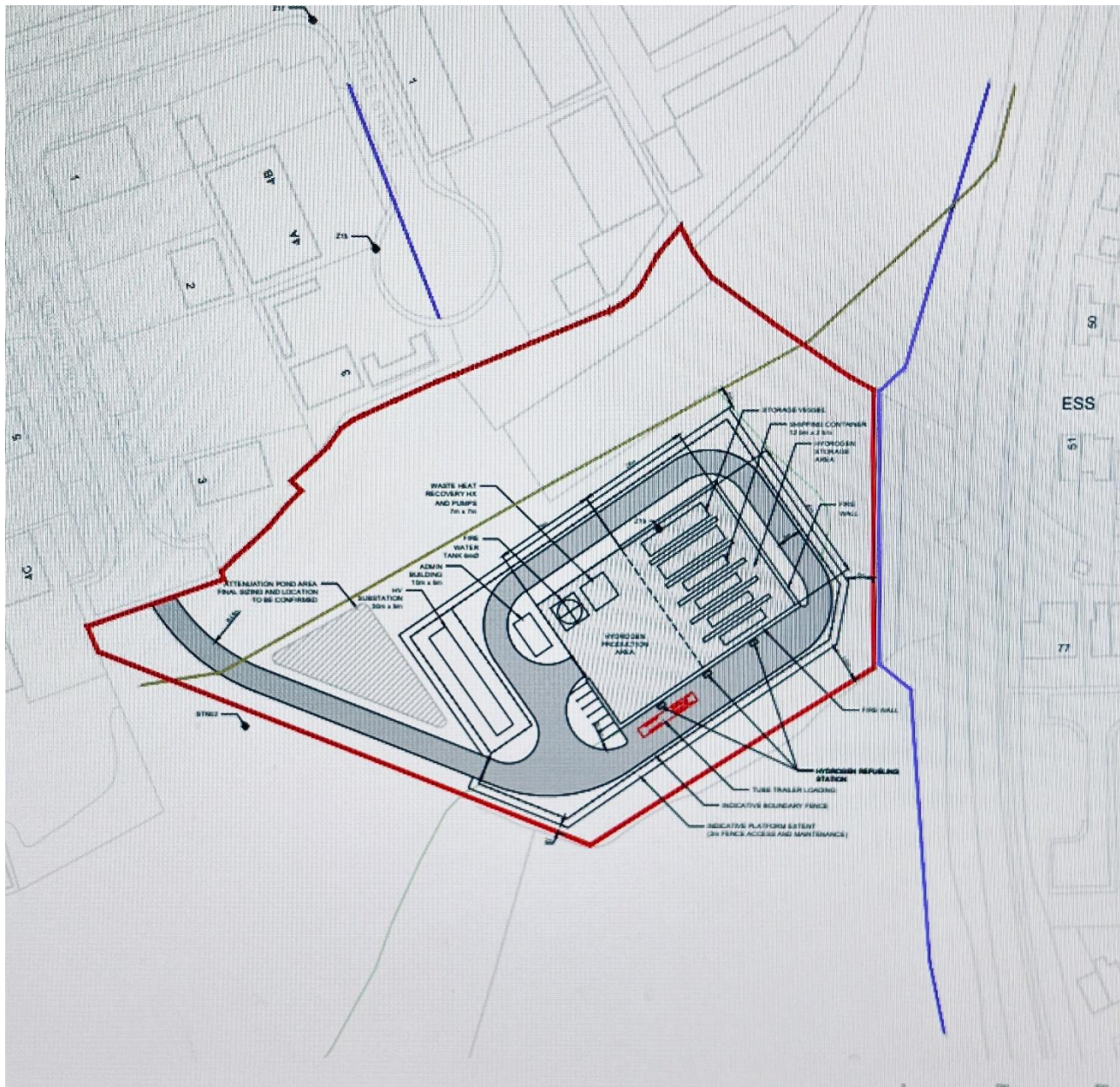
NOTES

Scale at A1 1:500

Do not scale from drawing & all dimensions are in meters.

All levels are in metres and relate to AOD (ordnance survey)

Red line is site boundary



Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	WELSH PUBLIC LIBRARY STANDARDS
Report Owner / Corporate Director:	CORPORATE DIRECTOR, SOCIAL SERVICES & WELLBEING
Responsible Officer:	ANDREW THOMAS GROUP MANAGER – PREVENTION AND WELLBEING
Policy Framework and Procedure Rules:	THERE IS NO EFFECT UPON THE POLICY FRAMEWORK OR PROCEDURE RULES
Executive Summary:	<p>The report summarises the performance of library services across Bridgend County Borough as assessed by Welsh Government for the periods 2021-22 and also 2022-23. The reports highlight the way that Welsh Government have applied the standards to local authorities as they have come out of the pandemic. The standards include a range of core entitlements and also quality standards with benchmarked information provided in many instances to compare and contrast performance to that of other local authorities. Within Bridgend, although the library services are operated by Awen, this is on behalf of the Council who hold the statutory duty for supporting a comprehensive and efficient library service. The assessment highlights good areas of performance that are being achieved and also those areas of the standards where they have either not been met in full or met at all. The report is relevant when considering any changes that the Council will be looking to introduce in regard to the provision of library services.</p>

1. Purpose of Report

- 1.1 The purpose of this report is to present to Cabinet the Council's performance against the Welsh Public Library Standards (WPLS) sixth framework for the periods 2021-22 and 2022-23.
- 1.2 The Council has a statutory duty to provide a comprehensive and efficient library service to meet the needs of all residents in the County Borough.

2. Background

- 2.1 The provision of public library services in the United Kingdom was made a statutory service for local government as a result of the Public Libraries and Museums Act 1964. The legislation requires local authorities to provide 'a comprehensive and efficient library service for persons desiring to make use thereof'.
- 2.2 The responsibility for overseeing the terms of the 1964 Act and how it is applied within Wales currently rests with the Deputy Minister for Culture, Sport and Tourism who have a duty under section 1 of the Act 'to superintend and promote the improvement of the public library services provided by local authorities and to secure the proper discharge by local authorities of the functions in relation to libraries conferred upon them as library authorities by or under the 1964 Act'.
- 2.3 In order to assist discharging this responsibility, in 2002 the Welsh Government established a framework of standards for the management of local authority library services, by local authorities, the Welsh Local Government Association (WLGA) and other relevant bodies. As part of this framework, new targets relating to library provision and performance are reviewed and set every three years. One of the overall objectives of the standards is that libraries offer all the services and facilities listed as core entitlements within the framework with quality also being measured via a range of performance indicators and impact measures.
- 2.4 Since 2017, local authorities have commenced recording their performance against the sixth quality framework for Welsh libraries entitled 'Connected and Ambitious Libraries' and for the period 2017-2020. There has been anticipated revision of the WPLS standards, but this has been disrupted via the pandemic to date. Welsh Government in their publication 'How good is your public library service?' states 'Libraries will not necessarily be able to achieve the top levels of performance in all areas but are expected to achieve as many of the targets as possible and to seek improvements in those areas where performances are weaker. Authorities should also compare their performance with others in Wales and share best practice in order to bring about improvements'.
- 2.5 On an annual basis, Bridgend County Borough Council (BCBC) as the public library authority, is required to submit an annual Welsh Public Library Standards (WPLS) return for consideration by assessors. A report is issued to the Museums, Archives and Libraries Division (MALD) of the Welsh Government (more recently renamed the Culture Division of Welsh Government) who have responsibility for administering the framework. The report produced represents the considered view of the assessors on the Council performance for the given year.
- 2.6 On 1st October 2015, BCBC transferred the operational management of a range of cultural services including the library services to the Awen Cultural Trust. The statutory duty to provide the library service and report on its performance remains with the Council, but Awen, under the terms of the management agreement, provides the Council with the information required relating to performance in relation to the standards to satisfy itself that the service is meeting the desired outcomes. It should be noted that two library facilities are operated by Halo Leisure at Ogmore and Garw Valleys and with Bridgend Library co-located within Bridgend Life Centre.

- 2.7 It has previously been reported to Cabinet in January 2018, that to meet the outcomes required by Council, whilst reducing the Council management fee, the Awen Cultural Trust may need to review the methods of delivering the library service in a way that might not always meet the short-term requirements of the standards but will improve local impact and deliver on customer needs. This approach, established in 2016-17 and approved by Cabinet, continues to provide a strategic focus for the development of the library service and to encourage an innovative response.

3. Current situation / proposal

- 3.1 **Appendix 1** is the 2021-22 summary report received from Welsh Government although during this period libraries across Wales were rebuilding usage following the pandemic. BCBC did not receive this report until 2023.
- 3.2 Due to the pandemic the Minister had not sought reporting against the full framework of library standards but rather in regard to the core entitlement indicators of service where Bridgend fully met all 12 entitlements.
- 3.3 Across the County Borough there are 11 libraries as well as a home delivery service and with 99% of residents identified as living within 2.5 miles of a library service which forms a part of the evaluation criteria.
- 3.4 For the 2021-22 reporting period, the service was in the bottom quartile for expenditure on Welsh language resources but in the median rank for issues per 1,000 Welsh speakers and with significant increases in Welsh issues demonstrated. This example highlights how the role of trained library staff can support more prudent investment into resources to meet identifiable community need.
- 3.5 During this period, the service saw a 23% increase in active borrowers with growth evidenced across both children's and adult's issues.
- 3.6 The assessors identified that in 2021-22, Bridgend were in the top quartile for investment into children's resources but were in the second quartile overall regarding material spend. They also noted positive investment into accessible resources for people with visual impairment. It should be noted that when planning services, the focus of investment into resources can vary annually, and usage of resources is a related indicator.
- 3.7 Good practice examples were recognised including covid safe home delivery to the vulnerable, supporting customers with digital literacy and development of new reading groups to rebuild community confidence.
- 3.8 It should be noted that Awen maintained library service operations in line with restrictions throughout the pandemic and offered innovative and flexible responses where safe to do so.
- 3.9 **Appendix 2** is the 2022-23 report from Welsh Government in response to the library self-assessment return regarding Welsh Public Library Standards.

- 3.10 The overall assessment highlights the positive support that libraries are providing local communities across Bridgend: -
- ‘Bridgend continues to display a strong emphasis on library programmes, alongside staff development and continued partnership working with the local community, to ensure the service remains resilient and continues to meet the needs of the community’.
- 3.11 In particular, the assessors recognised the commitment to engage with service users and impact on customer experience: ‘Bridgend’s commitment to community engagement and consultation is a significant strength and customers report high levels of satisfaction with the service’.
- 3.12 In regard to the core entitlements of the WPLS Bridgend once again met all 12 requirements.
- 3.13 In addition to the core entitlements there are 16 quality indicators of which 10 have constituent targets. Of the ten, the assessors identified that Bridgend is achieving 5 in full and 2 in part.
- 3.14 Where the quality indicators have not been met in full, there are appropriate explanations:
- Awen have successfully secured investment to improve library facilities within the year and the related development works will have caused delays at times regarding inter-library loans and response times.
 - Whilst Awen achieved the requirements in regard to qualified staff per capita and service management they did not have sufficient library staffing overall based on WPLS requirements but still delivered positive outcomes for service users.
 - The mapping of library service points and population within 2.5 miles of a library has been identified by Welsh Government as a national issue to resolve for most local authorities.
- 3.15 The two indicators not met are linked to the level of expenditure per capita on resources and more specifically Welsh language resources also. There have been historical reductions in expenditure in this respect and agreed with Cabinet.
- 3.16 The report however states that Bridgend has a strong Welsh language offer in library settings when looking beyond pure expenditure metrics.
- 3.17 Bridgend is also recognised as a top quartile authority in regard to issues of children’s book stock.
- 3.18 Within the customer satisfaction survey conducted, 100% of adult survey respondents rated the standard of customer care and the library overall as good or very good.
- 3.19 The 2022-23 report includes an impact statement on the ‘Books on Wheels’ home delivery service that supports the most vulnerable including carers and those with

greater accessibility needs. This has been a more efficient use of resource than the former mobile library service which was removed in 2019.

- 3.20 The following table highlights Bridgend's performance in regard to a range of quality indicators within the WPLS.

QI 2	Very Good/ Good choice of books	99%	1 st
	Very Good/ Good customer care	100%	1 st
	Very Good/ Good IT facilities	99%	1 st
	Very Good/ Good Overall	100%	1 st

QI 8	Active borrowers per capita	106	12 th
	Overall visits per capita	1645	17 th
	Virtual visits per capita	468	14 th

QI 1	Total expenditure per capita	9828	14 th
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QI 15	Net cost per visit	2.88	11 th
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- 3.21 The report identifies that Bridgend is above the median for the percentage of adults who state that the library has made a difference to their lives.
- 3.22 Bridgend libraries supported 1,000 adult events and 1,600 children's events including new social activities and links to the cost-of-living crisis.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 The protected characteristics identified within the Equality Act, Socio-economic duty and the impact on the use of the Welsh language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives.

- 5.1 The provision of library services contributes to the wellbeing of local people and communities in the following ways: -

Involvement The engagement of residents and reviewing their perspectives to improve library services has been recognised as a strength of the Bridgend Library Service.

Long-Term Bridgend has been progressing its longer-term approach to providing library services since the last full review conducted in 2010 and has achieved many of the related objectives. There is an opportunity to develop a new long-term strategy for libraries across Bridgend.

Prevention	Beyond the provision of resources, information and access to ICT for the more vulnerable, libraries provide Council information Points and support the public to engage within their communities.
Integration	Library services connect with other public sector bodies including health, education and social care and the broader third sector.
Collaboration	The library services are part of the broader cultural trust partnership that delivers services on behalf of BCBC and builds broader collaborative work with other stakeholders and investors into Bridgend based opportunities.

5.2 In regard to the Council's wellbeing objectives the library services contribute to the following objectives: -

- A County Borough where we protect our most vulnerable.
- A County Borough with thriving valleys communities.
- A County Borough where we help people meet their potential.
- A County Borough where people feel heard, valued and part of their community.
- A County Borough where we support people to live healthy and happy lives.

5.3 The Future Generations Commissioner for Wales has identified the importance of ensuring continued free access to libraries and museums to support local communities to access the variety of cultural opportunities and activities on offer to them in these spaces.

6. Climate Change Implications

6.1 There is no impact or link to Bridgend County Borough Council's climate change aspirations as a result of this report.

7. Safeguarding and Corporate Parent Implications

7.1 The partnership agreement between the Council and Awen ensures that appropriate arrangements are in place to ensure the safety and wellbeing of service users and staff.

7.2 The library service ensures that our more vulnerable residents and those requiring connection to information and assistance can be supported by acting as Council Information Points.

7.3 Awen as the Council's delivery partner of library services are actively engaged in the corporate parenting strategy and steering group.

8. Financial Implications

- 8.1 The Council's contribution to the costs of operating library services in Bridgend is integrated into the management fee payable to Awen.
- 8.2 The Council has applied a number of Medium Term Financial Strategy saving requirements from the management fee since 2015 and this will already have seen a reduction in expenditure on resources and availability of services including the closure of the Ty'r Ardd reference library, replacement of the mobile library service with a home delivery service for the more vulnerable and reductions in opening hours at Pyle, Sarn and Y Llynfi.
- 8.3 As the library authority it will be for BCBC to determine any changes in requirements going forward that may be driven by a challenging financial position and to consider the impact on its ability to meet the Welsh Public Library Standards.
- 8.4 Welsh Government have stated in their covering letter for the 2022-23 report: *"Whilst I acknowledge that authorities are having to make difficult decisions, I would request that any budget cuts to library services are not disproportionate. It is a statutory duty to provide a 'comprehensive and efficient' public library service and in Wales that is determined by the WPLS framework"*.
- 8.5 The need to reduce expenditure on library services including the availability of library spaces and related resources has been included in the Council's budget reduction plans and also formed a part of the Council's budget consultation. The Council is working with Awen on the implications to library services relating to reductions in management fee that may apply. These reductions will be a part of the overall management fee that the Council provides to Awen.

9. Recommendation

- 9.1 Cabinet is recommended to: -
- Consider and note the content of the report and Appendices 1 and 2 recognising the positive work that Bridgend's library services have delivered to date in regard to the Welsh Public Library Standards.

Background documents

None

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Bridgend County Borough Council – Awen Cultural Trust

Overview and location

Library services in Bridgend are delivered by Awen Cultural Trust. There are 11 libraries, as well as a home delivery service, and 99% of residents live within 2.5 miles of a library.

Library service performance

Awen provided evidence that showed it has fully met all 12 of the core entitlements.

Core entitlement	Service self-assessment	Independent assessment
1 Libraries in Wales will be free to join and open to all.	Fully met	Fully met
2 Libraries in Wales will ensure friendly, knowledgeable and qualified staff are on hand to help.	Fully met	Fully met
3 Libraries in Wales will provide access to a range of services, activities and high quality resources in a range of formats to support learning, personal well-being and development, community participation, and culture and recreation.	Fully met	Fully met
4 Libraries in Wales will provide appropriate services, facilities and information resources for individuals and groups with special needs.	Fully met	Fully met
5 Libraries will provide appropriate safe, attractive and accessible physical spaces with suitable staffed opening hours.	Fully met	Fully met
6 Libraries in Wales will lend books for free and deliver free access to information, including online information resources available 24 hours a day.	Fully met	Fully met
7 Libraries in Wales will provide free use of the Internet and computers, including Wi-Fi.	Fully met	Fully met
8 Libraries in Wales will provide access to services, cultural activities and high quality resources in the Welsh language.	Fully met	Fully met
9 Libraries in Wales will work in partnership to share catalogues and facilitate access to the resources of all Welsh libraries.	Fully met	Fully met
10 Libraries in Wales will work with a range of partners to promote and deliver services to new and diverse audiences, enabling more people to benefit from their services.	Fully met	Fully met
11 Libraries in Wales will regularly consult users to gather their views on the service and information about their changing needs.	Fully met	Fully met
12 Libraries in Wales will provide access to the library service's strategy, policies, objectives and vision, in print and online, in a range of languages appropriate for the community.	Fully met	Fully met
Total - fully met	12	12

Total - partially met	0	0
Total - not met	0	0

Library use

Over the reporting year, the service had 85 active borrowers per 1,000 population, representing a 23% increase from the previous year. Adult book issues increased by 229% to 1,224 issues per 1,000 population, while children's book issues increased by 834% to 831 issues per 1,000 population. Awen provides a home delivery service for their customers to aid those who are unable to come to the libraries. The service is not limited to those who are incapacitated by illness, age or disability, but also includes carers and young families.

Highlights

The service has been working to bring back services to pre-pandemic levels safely and carefully, as well as planning for the future with a new three-year strategy.

Highlights of the past year include:

- The return of services while also abiding to safety and supporting staff. This includes supporting staff that need to isolate, special measures such as wearing FFP2 standard masks for home delivery, and supporting staff who would prefer to wear masks;
- Working to improve digital literacy. This includes providing support for users such as help to apply for a bus pass, and general help for those digitally excluded or who have little confidence in using devices. Public PCs have also helped with employment support;
- The 'Bounce and Rhyme' programme has given the opportunity for people who may otherwise feel isolated to meet, especially single mothers;
- At Porthcawl Library, the existing reading group was at capacity; therefore a new group was started, and the Library worked to get zoom meetings up for the group called The Bookies.

Materials, Welsh language and overall spend

Awen is in the second quartile for material spend per 1,000 population. 23% of this expenditure was on children's materials, for a population of which 17% are under 16 years old. This puts it in the top quartile for budget spent on children's resources, Awen has also invested in memory sticks with e-books downloaded that can be played on a Boombox (a portable speaker), allowing for greater accessibility to the service for those who are visually impaired.

Despite the difficulties of recovering from the pandemic, Awen has had over 33,000 people (children and adults) attend their events this past year, in both English and Welsh. These events have included Dungeons and Dragons, Carer Afternoons, Coding Clubs, and Knit and Natter

In terms of Welsh resources, the service has introduced three new bilingual Bounce and Rhyme sessions, as well as increased support for Bore Coffi (coffee morning) sessions. A review of resources has identified the need for more Welsh language newspapers and magazines, including those for children. Currently, the service is in the bottom quartile for spending on Welsh language materials, with a spend of only 2%. The service, however, does rank in the median of the services for the number of issues per 1,000 Welsh speakers, and Welsh issues saw an increase of 577%, greater than that of overall issues.

Staffing

There are 15 members of staff with library-related qualifications and the operational manager of the library service holds a MCLIP qualification. All vacancies were filled by March 2022, and a new post of Heritage Manager, who oversees heritage work and local and family history resources, was added.

The time spent on staff training and development increased by 1.8% to 9.7% over the period. This training includes a three-month induction, training in first aid, Microsoft 365 and safeguarding. Staff are also encouraged to suggest courses that they are interested in, and feed back to the team for shared learning.

Digital data

Awen provided digital data including click and collect, online sessions held and number of individuals who viewed live/recorded sessions. Awen saw a reduction in all three measures of use of digital services, as well as e-issues over the period. In terms of 'Click and Collect', they saw a reduction of 61% from 2021 to 2022 and ranked in the median across the services for click and collect per 1,000 population. The service ranked in the top quartile for online sessions even though the number of online sessions reduced by 46%, and the individuals taking part reduced by 73%. This fall can partially be attributed to Awen moving away from online resources to focus on in-person services. However, it remains committed to reaching vulnerable groups through its online services and by the 'Books on Wheels' programme. The number of e-issues per 1,000 population reduced by 33% and is in the first quartile across the services. The service partially claims that this is due to a change in eMagazine provider and the difference between the supplier's calibration of issues.

Future plans

Under its new 2022-25 strategy, the service places social impact at the centre of all future plans, using milestones and SMART performance indicators to evaluate impact and change. Priorities for 2022/23 include the completion of Maesteg Town Hall development and the redevelopment of Pencoed library.

The service also aims to engage further with non-users and introduce a range of environmental initiatives including investigating the discontinuation of plastic book jackets, introducing non-plastic membership cards and the installation of solar panels and LED bulbs were possible.

The service will keep in discussion with customers and staff to evaluate events, activities, open hours, and the impact of the library plan.

Case studies

Awen provided three extensive case studies with images and quotes from library users to illustrate the good work across the service. These included the importance of digital services as a key way to promote reading for individuals who may otherwise struggle to access services, and how use of the space has contributed to wellbeing and productivity for a homeworker

Welsh Public Library Standards Sixth Framework: Bridgend Library Services (Awen Cultural Trust)

Annual Assessment Report 2022/2023

This report has been prepared based on information provided in Bridgend's annual return, impact statements and narrative report submitted to the Culture Division of the Welsh Government.

1. Executive summary

Bridgend met all of the 12 core entitlements in full. Of the 10 quality indicators which have targets, Bridgend achieved 5 in full and 2 in part. Two targets were not met and the final target is unknown as the service report that as a charitable trust they do not have access to the software to calculate this.

Bridgend continues to display a strong emphasis on library programmes, alongside staff development and continued partnership working with the local community, to ensure that the service remains resilient and continues to meet the needs of the community. The service also has a strong Welsh language offer in terms of staffing activities, despite not meeting the target for Welsh language acquisitions. Bridgend's commitment to community engagement and consultation is a significant strength and customers report high levels of satisfaction with the service. The service has identified a coherent set of priorities for the coming year and is taking steps to improve its digital and online provision, including improvements to its website and digital outreach provision.

- The service performs well in terms of customer satisfaction; 100% of adult user survey respondents rated the standard of customer care and the library overall as 'very good' or 'good' overall (Q12).
- Library events are well-attended; attendances at events per capita is in the top quartile of library authorities (Q16).
- The child's book stock is well-used; issues per capita are in the top quartile of Welsh library authorities (Q19).
- Professional development is well-supported; Bridgend is in the top quartile of library authorities for staff hours spent on training (Q13).

2. Performance against the standards

The standards framework comprises of core entitlements, quality indicators with targets, quality indicators with benchmarks and impact measures. Section 2 summarises achievements against these areas. A narrative assessment of the authority's performance is provided in Section 3.

2.1 Core entitlements

Bridgend reported meeting all of the 12 Core Entitlements in full through self-assessment, providing detailed and helpful commentary within the return on each area covered. The independent assessor agreed with the self-assessment.

2.2 Quality indicators with targets

There are 16 quality indicators (QIs), of which 10 have constituent targets. Of these, Bridgend is achieving 5 in full and 2 in part. Two targets were not met and the final target is unknown as the service report that as a charitable trust they do not have access to the software to calculate this.

Quality Indicator	Met?	
QI 3 Support for individual development:		Met in full
a) ICT support	✓	
b) Information literacy and skills training	✓	
c) E-government support	✓	
d) Reader development	✓	
QI 4 (a) Support for health and well-being		Met in full
i) Book Prescription Wales scheme	✓	
ii) Better with Books/Reading Well scheme	✓	
iii) Designated health & well-being collection	✓	
iv) Information about healthy lifestyles and behaviours	✓	
v) Signposting to health & well-being services	✓	
QI 6 All static service points offer events/activities for users with special requirements	✓	Met in full
QI 7 Location of service points	Not provided	Unknown
QI 9 Up-to-date and appropriate reading material		Not met
Acquisitions per capita	x	
or Materials spend per capita	x	
QI 10 Welsh Language Resources		Not met
% of material budget spent on Welsh	x	
or Spend on Welsh per capita	x	
QI 11 Online access:		Met in full
a) i) Public access to Internet	✓	
ii) Wi-Fi provision	✓	
QI 12 Supply of requests		Partially met
a) % of requests satisfied within 7 days	✓	
b) % of requests satisfied within 15 days	x	
QI 13 Staffing levels and qualifications:		Partially met
i) Staff per capita	x	
ii) Qualified staff per capita	✓	
iii) Head of service qualification/training	✓	
iv) CPD percentage	✓	
QI 16 Opening hours per capita	✓	Met in full

2.3 Impact measures

The framework includes three indicators aimed at assessing the impact of library use on people's lives. These indicators do not have targets, and authorities were only required to carry out user surveys for QI1 once over the original three-year period of the framework (2017-20). The summary figures (lowest, median and highest) are based on all authorities providing data in the 2022-23 return. Rankings reflect the numbers of respondents, where 1 is the highest scoring authority. However, it is important to bear in mind that some authorities have conducted surveys since 2020, whilst others report survey data from before the Covid pandemic. Some responses therefore reflect the situation several years ago, whilst others may have been affected by disruption during the pandemic period. As a result, there are limitations on the extent to which these data might be considered comparable.

Bridgend completed its adult and children's user survey in March 2020.

Performance indicator		Rank	Lowest	Median	Highest
QI 1 Making a difference					
b) % of young people who think that the library helps them learn and find things out:	90%	=7/16	58%	90%	98%
e) % of adults who think that the library has made a difference to their lives:	89%	7/16	41%	86.5%	96%
QI 5 b) % of attendees of training sessions who said that the training had helped them achieve their goals:	98%	=7/17	82%	96%	100%

Authorities are also asked to provide an impact statement describing the impact which the library service has had on an individual or on a group of individuals during the year.

Bridgend provided an impact statement which referred to the value of the Books on Wheels service to people facing challenges reaching a static library. The service delivers books, CDs and audio books to customers, and assists customers with accessing other services including online resources and iPads. One customer living alone with deteriorating sight referred to the sense of well-being, increased confidence and comfort that listening to the wide range of audiobooks using the BoomBox service provided. She also looked forward to the visits from the library service and valued the contact and interaction with the library staff.

2.4 Quality indicators and benchmarks

The remaining indicators do not have targets but allow services to monitor and benchmark their performance over time, in comparison with other authorities. The following table summarises Bridgend's position for 2022-23. Ranks are included out of 22, where 1 is the highest, and 22 the lowest scoring authority, unless stated otherwise. Indicators where fewer than 22 authorities supplied data are those where relevant data was not available from some authorities. Indicators 'per capita' are calculated per 1,000 population unless otherwise noted.

Performance indicator		Rank	Lowest	Median	Highest
QI 1 Making a difference					
a) % of adults who think that using the library has helped them develop new skills	66%	11/16	24%	69.5%	90%
c) health and well-being	55%	10/16	35%	66.5%	94%
d) enjoyable, safe and inclusive	97%	=8/16	93%	97%	100%
QI 2 Customer satisfaction					
a) 'very good' or 'good' choice of books	99%	1/16	80%	91%	99%
b) 'very good' or 'good' customer care	100%	1/17	92%	98%	100%
c) 'very good' or 'good' IT facilities	99%	1/16	65%	86%	99%
d) 'very good' or 'good' overall	100%	=1/17	94%	98%	100%
e) users aged 16 & under rating out of ten	9.3	=8/16	8.0	9.3	9.7
QI 5 User training					
a) attendances per capita	7	=13/22	1	10.5	222
c) informal training per capita	5	19/19	5	131	424
QI 6 attendances at events per capita	559	1/22	13	165	559
QI 8 Library use					
a) visits per capita	1,645	17/21	781	2,106	4,814
b) virtual visits per capita	468	14/22	124	537.5	7,979
c) active borrowers per capita	106	=12/22	43	106.5	167
QI 10 Welsh issues per capita	52	12/22	13	53	864
QI 11 Online access					
a) Computers per 10,000	4.46	20/22	3.32	7.99	16.99
b) % of available time used by the public	8%	16/19	7%	11%	77%
QI 13 Staffing levels and qualifications ¹					
(v) a) total volunteers	36	-	0	8	256
b) volunteer hours	1,292	-	0	583.5	14,014
QI 14 Operational expenditure					
a) total expenditure per capita	£9,828	14/21	£6,726	£11,476	£27,330
b) % on staff	72%	4/21	46%	64%	78%
% on information resources	14%	6/21	5%	12%	21%
% on equipment and buildings	4%	=9/21	1%	3%	29%
% on other operational costs	10%	15/21	1%	15%	35%
c) capital expenditure per capita	£1,733	3/21	-£479	£145	£2,865
QI 15 Net cost per visit ²	£2.88	11/19	£0.41	£2.76	£6.22
QI 16 Opening hours ³					
(iii) a) % hours unplanned closure of static service points	0%	=1/22	0%	0.05%	0.95%
b) % mobile stops / home deliveries missed	0%	=1/20	0%	0%	3.74%

¹ Following discussion with the peer review group it was decided not to include rankings for volunteers as the implications of volunteer numbers are ambiguous.

² Rankings here have been reversed, so that 1 is the lowest scoring (best performing) authority.

³ Rankings here have been reversed, so that 1 is the lowest scoring (best performing) authority.

3. Analysis of performance

The core entitlements and quality indicators can be divided into four key areas. This section of the report outlines performance under these areas.

3.1 Meeting customer needs (QI 1-5)

Bridgend appreciates the importance of responding to customer needs, for example, using data from annual surveys to ensure post-Covid opening hours meet the needs of its communities and conducting research to help plan Pencoed's redevelopment. The service is at or above the median for customer satisfaction targets, including 100% of adult user survey respondents who rated the standard of customer care and the library overall as 'very good' or 'good' overall (QI2). As part of this responsive approach, it is noted that libraries within the Trust are allocated an annual budget to allow staff to respond to customer or staff feedback to improve small details of the library, such as comfy seating for Warm Welcome areas and providing pop-up travel cots. Both formal and informal training attendances per capita are below the median (QI5). However, this may be related to adjustments post-Covid, as noted by a number of library services this year. The percentage of attendees who said that the training had helped them achieve their goals is above the median. Bridgend is also above the median for the percentage of adults who think that the library has made a difference to their lives (QI1)

3.2 Access and use (QI 6-8)

Bridgend held almost 1,000 adult events and over 1,600 children's events during the year, as well as eight online events. These included new social activities introduced in response to the cost-of-living crisis. Attendances at events per capita is in the top quartile of library authorities (QI6). Whilst the number of visits per capita is below the median, the number of active borrowers per capita is around the median and child book issues per capita are in the top quartile of Welsh library authorities (QI8). Although virtual visits per capita is below the median, Bridgend reports an increase in the number of users, new users and sessions on its website, along with an increase in average session duration. Actions taken to stimulate this increase include: improved the Google Analytics tracking across the website; more regular updating of the website with news, events etc.; more pages added to the website; improved SEO; and the use of Google Ad campaigns.

3.3 Facilities and services (QI 9-12)

Bridgend did not meet the target for acquisition of reading materials (QI9). It is noted that the increased spend on children's stock in the previous year budget meant that the service moved some of this budget in 22-23 to satisfy the growing number of requests for eBooks and eAudiobooks. Although Bridgend has not met the target for budget spend on Welsh language resources, the number of Welsh issues per capita is close to the median (QI10), and the service is informed by the needs of customers in the purchase of Welsh language resources, including buying stock at the request of the Welsh Language Discussion Group.

Bridgend meets the targets for online provision, but it is below the median for computers per capita and available time that computers are in use (QI11). However, opening times were shortened for periods of 22-23 and fewer PCs were available as

the library readjusted following Covid. The service has extended its IT outreach provision, with the iPads for Carers scheme being extended to all those in need of at-home digital provision and a partnership with the Good Things Foundation to offer free data to those in need. Bridgend partially met the target for supply of requests (QI12). Its performance in this area was impacted by more requests than would be usual being supplied through inter library loan, whilst two libraries were closed for refurbishment/to facilitate a move.

3.4 Expertise and capacity (QI 13-16)

Although the overall target for staff per capita was not achieved, Bridgend is above the median for this target (QI13). The percentage of operational expenditure allocated to staffing is above the median (QI14). All vacancies that arose during 22-23 were filled, and a part-time library assistant post was added to the structure. Furthermore, two library volunteers went on to employment with the service. Staff training and development continues to be a priority, with Bridgend implementing a comprehensive staff training programme and being in the top quartile of library authorities for staff hours devoted to training. By focusing on training in key library skills, the service reports a rise in staff confidence in dealing with queries and managing stock. Cost per visit is close to the median (QI15). Bridgend kept its Covid opening hours through 22-23. Following a period of consultation, new opening hours will be introduced in 23-24. The service did not experience any emergency closures or missed home deliveries (QI16).

4. Strategic context

As part of the return, authorities are asked to report on how the library service is contributing to wider Welsh Government priorities and strategic goals. Bridgend highlights its new Social Impact Objectives, namely:

- **To create better life chances** by engaging with more people, improving literacy and digital literacy, supporting reading for pleasure, promoting independence and reducing social isolation.
- **To create memorable and positive experiences** by offering space to the community that meets their needs, offers flexibility, is welcoming and safe, and able to host different activities.
- **To support social regeneration and improve wellbeing** by improving access to health information, reducing social isolation and improving the wellbeing of participants.
- **Increase life skills and opportunities** through formal and informal training. Have a positive impact on literacy and information literacy.
- **To reduce energy consumption** and reduce our impact on the environment.

5. Future direction

Reporting on the authority's future direction and plans for the library service over the following year, Bridgend refers to the service's 2022-25 Library Plan. The identified priorities for 2023-24 are:

- Develop a consistent wellbeing activity programme, working with staff and partners.

- Identify training opportunities for staff to deliver wellbeing-related sessions e.g. Mindfulness, Shared Reading.
- Introduce a social programme for BOW users to reduce isolation.
- Launch Friends panel to engage with children and young people over a longer period.
- Conduct user and non-user surveys around the offer for children and young people.
- Carry out programme of author visits for schools.
- Continue installation of LED bulbs and solar panels where possible.

In addition, Maesteg Town Hall is currently undergoing a large re-development that will house Maesteg Library as well as the Local and Family History collection.

6. Conclusion

Bridgend continues to display a strong emphasis on library programmes, alongside staff development and continued partnership working with the local community, to ensure that the service remains resilient and continues to meet the needs of the community. The service also has a strong Welsh language offer in terms of staffing activities, despite not meeting the target for Welsh language acquisitions. Bridgend's commitment to community engagement and consultation is a significant strength and customers report high levels of satisfaction with the service. The service has identified a coherent set of priorities for the coming year and is taking steps to improve its digital and online provision, including improvements to its website and digital outreach provision.

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Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	PROCEDURE FOR THE APPOINTMENT AND REMOVAL OF LOCAL AUTHORITY GOVERNORS
Report Owner / Corporate Director:	CORPORATE DIRECTOR – EDUCATION AND FAMILY SUPPORT
Responsible Officer:	ROBIN DAVIES GROUP MANAGER (BUSINESS SUPPORT)
Policy Framework and Procedure Rules:	There is no effect upon the policy framework or procedure rules.
Executive Summary:	<p>All school governing bodies have four compulsory groups of governors. One of these groups is local authority governors. Local authority governors are appointed by the local authority.</p> <p>The current procedure for the appointment and removal of local authority governors was approved by Cabinet in 2008. It is no longer fit for purpose and a new procedure is proposed.</p>

1. Purpose of Report

1.1 The purpose of this report is to:

- seek approval from Cabinet for the procedure for the appointment and removal of local authority governors (at **Appendix A**); and
- authorise an amendment to the Scheme of Delegation of Functions.

2. Background

- 2.1 All governing bodies of maintained schools, including maintained nursery schools, in Wales must be constituted in accordance with The Government of Maintained Schools (Wales) Regulations 2005.
- 2.2 All school governing bodies have four compulsory categories of governors. One of these categories is local authority governors.
- 2.3 A person cannot be appointed as a school governor if they do not meet the qualification criteria, or if they meet any of the disqualification criteria, set out in The Government of Maintained Schools (Wales) Regulations 2005.

- 2.4 Local authority governors are appointed by the local authority. The local authority can appoint any eligible person as a local authority governor who is interested in supporting schools and whose appointment has the support of the local authority. Candidates for local authority governor positions do not have to be councillors. A person cannot be appointed a local authority governor for a school if they are eligible to be a staff or teacher governor of the school.
- 2.5 The term of office of most governors is four years from the date of appointment. Any governor may choose to resign from their term of office at any time. Any governor may apply to be re-elected/appointed for a further term, as long as they meet the qualification requirements. Any local authority governor may be removed from office by the local authority.

3. Current situation/proposal

- 3.1 The current procedure for the appointment and removal of local authority governors was approved by Cabinet in 2008.
- 3.2 While the current procedure requires Cabinet to approve the appointment of local authority governors (based on the recommendation of officers), the proposed replacement procedure no longer requires such approval by Cabinet. This is because such appointments are operational and, therefore, the new procedure will allow for appointments to be made on the basis of evidenced levels of relevant knowledge, skills and experience.
- 3.3 The current procedure prioritises elected councillors where there is competition for a vacant local authority governor position, or where there is no competition for such a vacancy, applicants are generally appointed without any scrutiny of competence, skills or knowledge. The proposed replacement procedure changes this approach, to ensure that local authority governors are able to evidence the relevant knowledge, skills and experience required of the position, to the benefit of the school. The proposed role description and person specification is appended to the procedure.
- 3.4 The proposed procedure makes the responsibility to recommend the appointment of local authority governors that of an officer panel, constituted of officers nominated by the Corporate Director – Education and Family Support. The terms of reference of the panel are appended to the procedure. The recommendation will be presented to the Corporate Director – Education and Family Support who will, under delegated authority, and in liaison with the Cabinet Member for Education, make the determination of the appointments.
- 3.5 The proposed procedure makes it clear that the power to remove a local authority governor will be used reasonably and lawfully. While the officer panel may recommend the removal of a local authority governor, the final decision will be made by the Corporate Director - Education and Family Support, in consultation with the Cabinet Member for Education.
- 3.6 It is proposed that the following new function is delegated to the Corporate Director – Education and Family Support at Scheme B2 of the Scheme of Delegation of Functions:

4.5	To approve the appointment and removal of school governors to the schools within the Borough, in consultation with the Cabinet Member – Education, having regard to the recommendations of the Local Authority Governor Appointments Panel.
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- 3.7 On a quarterly basis, the Corporate Director – Education and Family Support will present a report for information to Cabinet, detailing the names of those individuals appointed to local authority governor vacancies and the relevant schools.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impacts on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.
- 4.2 A Welsh Language Impact Assessment has identified that there would be no negative impacts in terms of opportunities for people who choose to live their lives and access services through the medium of Welsh.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

- 5.1 A Well-being of Future Generations (Wales) Act 2015 assessment has been completed. A summary of the implications from the assessment relating to the five ways of working is as follows:

Long-term

In the short-term, the local authority may support any person for appointment who is able to demonstrate the essential attributes at a basic level, as a minimum, and is not disqualified from being a school governor. The local authority, in conjunction with the Central South Consortium, supports new governor appointments with a comprehensive programme of both mandatory and voluntary training and access to resources, to enable them to further develop their knowledge and skills and be successful in fulfilling the role.

Prevention

The local authority assesses the suitability of applicants for the local authority governor vacancy/vacancies applied for against a set of essential and desirable criteria. The local authority, in conjunction with the Central South Consortium, supports governors with a comprehensive programme of both mandatory and voluntary training and access to resources, to enable them to further develop and maintain their knowledge and skills, and be successful in fulfilling the role. The local authority has the power to remove any local authority governor if this is justified by a local authority governor's conduct, or inability to appropriately or effectively discharge their responsibilities as a local authority governor.

Integration

School governing bodies have a strategic role in running schools and ensuring that all pupils are supported to learn and achieve so that they can access opportunities for further learning and employment, know how to maintain their well-being, can play active roles in their communities and can contribute positively to society as a whole.

Collaboration

School governing bodies have a strategic role in ensuring that schools safeguard the health and well-being of pupils and staff. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

Involvement

The local authority treats all applications for local authority governor vacancies fairly, to ensure equality of opportunity. The power to remove a local governor is exercised reasonably and lawfully.

School governing bodies have a strategic role in ensuring that schools safeguard the health and well-being of pupils and staff. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

- 5.2 A summary of the implications from the assessment relating to the council's new seven well-being objectives, is as follows:

1 A County Borough where we protect our most vulnerable

School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have important responsibilities towards vulnerable children. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect. The local authority has the power to remove any local authority governor if this is justified by a local authority governor's conduct, or inability to appropriately or effectively discharge their responsibilities as a local authority governor.

2 A County Borough with fair work, skilled, high-quality jobs and thriving towns

Access to good education and ensuring children have equal opportunities to realise their potential are critical to helping young people acquire the knowledge and skills they need for work. School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a strategic role in the running of a school, deciding what the school should achieve, and setting the strategic framework for getting there.

3 A County Borough with thriving valleys communities

Access to good education, raising standards of achievement and ensuring children have equal opportunities to realise their potential, wherever they may reside, are critical to helping young people acquire the knowledge and skills they need for work. School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a strategic role in the running of a school, deciding what the school should achieve, and setting the strategic framework for getting there.

4 A County Borough where we help people meet their potential

As school governing bodies have a strategic role in the running of a school, this includes ensuring that children and young people have access to good education and equal opportunities to realise their potential, and that our schools are safe, supportive environments providing high quality teaching.

5 A County Borough that is responding to the climate and nature emergency

School governing bodies and, therefore, those appointed to serve as governors, have a shared responsibility for ensuring that teaching and learning encompasses sustainability and global citizenship.

6 A County Borough where people feel valued, heard and part of their community

School governing bodies and, therefore, those appointed to serve as governors, have a role in ensuring that there is engagement with pupils and the community served by the school, listening to views and taking appropriate actions. School governing bodies have a responsibility to support supporting diversity and inclusion and addressing discrimination.

7 A County Borough where we support people to live healthy and happy lives

School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a shared responsibility for ensuring that teaching and learning encompasses healthy eating and physical activity, personal and social development, self-worth and well-being.

6. Climate Change Implications

- 6.1 School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a shared responsibility for ensuring that teaching and learning encompasses sustainable development and global citizenship. Governing bodies also have a strategic role in considering the impact of net zero carbon and how to deliver this important national initiative.

7. Safeguarding and Corporate Parent Implications

- 7.1 School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have important responsibilities towards vulnerable children. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills

and effectiveness in safeguarding and promoting the welfare of vulnerable children and young people.

8. Financial Implications

8.1 There are no financial implications regarding this report.

9. Recommendations

9.1 Cabinet is recommended to:

- approve the procedure for the appointment and removal of local authority governors as summarised in paragraphs 3.1-3.5 and detailed in **Appendix A**.
- approve the amendment to the Scheme of Delegation of Functions as detailed in paragraph 3.6.

Background documents

None

Appendix A



PROCEDURE FOR THE APPOINTMENT AND REMOVAL OF LOCAL AUTHORITY GOVERNORS FOR SCHOOL GOVERNING BODIES

1. Introduction

All governing bodies of maintained schools, including maintained nursery schools, in Wales must be constituted in accordance with The Government of Maintained Schools (Wales) Regulations 2005.

All school governing bodies have four compulsory categories of governors. One of these categories is local authority governors.

Local authority governors are appointed by the local authority. The local authority can appoint any eligible person as a local authority governor who is interested in supporting schools and whose appointment has the support of the local authority. Candidates for local authority governor positions do not have to be councillors. A person cannot be appointed as a local authority governor for a school if they are eligible to be a staff or teacher governor of the school.

The term of office of most governors is four years from the date of appointment. Any governor may choose to resign from their term of office at any time. Any governor may apply to be re-elected/appointed for a further term, as long as they meet the qualification requirements. Any local authority governor may be removed from office by the local authority, as such governors are appointed and not elected.

2. Role of local authority governors

A governing body needs to hear views that will help to inform its discussions and decisions.

Local authority governors are representatives of the local authority and not delegates. They must act in the best interests of the school and wider community. They should represent the perspective and views of the local authority but cannot be directed by the local authority to take a particular stance on issues. However, local authority governors should have an awareness and understanding of the local authority's priorities and policies to enable them to inform the debates and priorities at school level.

The local authority recognises that individual governors are bound by the corporate responsibilities of the governing body. The local authority may periodically provide its

representative governors with information, but this does not replace the local authority's duty to communicate and consult with governing bodies.

3. Qualifications and disqualifications relevant to local authority governors

Qualification and disqualification of school governors is detailed in Schedule 5 of The Government of Maintained Schools (Wales) Regulations 2005.

1. A governor must be aged 18 or over at the time of their election or appointment.
2. A person is disqualified from holding or from continuing to hold office as a school governor if they:
 - fail to attend the governing body meetings, without the consent of the governing body, for a continuous period of six months, beginning with the date of the first meeting missed. Where a governor has sent an apology for the meeting, the minutes of that meeting must record the governing body's consent or otherwise to the absence and a copy of the minutes must be sent to the governor;
 - are made bankrupt, have made an arrangement with creditors, or had their estate sequestrated, which has not been discharged, annulled or rescinded;
 - have been disqualified from acting as a company director under the laws of Wales, England, Scotland or Northern Ireland;
 - have been removed from the office of charity trustee under the laws of Wales, England, Scotland or Northern Ireland;
 - are included in any list prohibiting or restricting their employment with children, young persons or adults under the laws of Wales, England, Scotland or Northern Ireland;
 - have received a sentence of imprisonment (whether suspended or not) for a period of not less than three months (without the option of a fine) in the five years before becoming a governor or since becoming a governor
 - have received a prison sentence of two-and-a-half years or more in the 20 years before becoming a governor;
 - have, at any time, received a prison sentence of five years or more;
 - have been fined for causing a nuisance or disturbance on school premises during the five years prior to or since appointment or election as a governor;
 - refuse a request by the governing body to make an application to the Disclosure and Barring Service (DBS) for a DBS certificate.

A local authority governor who meets any disqualification criterion while holding office must inform both the clerk to the governing and the local authority as soon as they are aware or should have been aware of the fact.

3. A person cannot, at any time:
 - hold more than one governorship at the same school; nor

- be a member of more than two governing bodies of maintained schools unless they are:
 - a governor appointed to a school causing concern under sections 6, 7, 13 or 14 of the School Standards and Organisation (Wales) Act 2013; or
 - a temporary governor (that is, a person appointed to be a member of a temporary governing body).

4. Standards of conduct

The local authority has produced a Code of Conduct for governors, and governing bodies have been recommended to adopt the document as their own.

The local authority expects all local authority governors to meet the standards set out in the Code of Conduct.

5. Attributes, knowledge, experience and skills

An applicant for a local authority governor vacancy will be expected to demonstrate that they possess a range of essential attributes.

An applicant will also be able to provide information on whether they have any level of knowledge, experience and skills against a range of desirable attributes.

The essential and desirable attributes are detailed in Appendix 1, role description and person specification.

6. Diversity

No group of characteristics or viewpoints should dominate the makeup of a governing body. Ultimately governing bodies need a blend of governors who between them understand the school and the wider communities they serve. This is gained through having characteristics, experiences and backgrounds in common with the pupils and their families. It also means that they have the right skills, approaches and attributes needed for effective school governance.

A 'representative governing body' will look different in each school. To this end, applications for local authority governors will be particularly welcome from minority and underrepresented groups and the appointment panel will take this into consideration when making recommendations for appointment.

Nevertheless, no governor should be recruited for what they bring in terms of their protected characteristics or lived experience alone. Governors will need to be appointed because they have the requisite or potential skills, experience and ability for the role. Skills and backgrounds are equally important.

Diversity, skills and experience will play an equal measure in ensuring that local authority governors are recruited to fully represent the local authority on governing bodies.

7. Advertising of local authority governor vacancies

To support the business of the governing body, the local authority aims to achieve timely appointments to vacancies and minimise any periods when vacancies are unfilled.

If a vacancy will arise because the term of office of an existing local authority governor is coming to an end, that forthcoming vacancy will be advertised by the local authority three months before the incumbent's term of office is due to end.

Pupil Services in the Education and Family Support Directorate will arrange for all local authority governor vacancies (current and forthcoming) to be advertised on the local authority's website.

8. Applications for local authority governor vacancies

The role description and person specification for local authority governors (Appendix 1), and the application form, will be published on the local authority's website. Any interested persons wishing to be considered for a local authority governor vacancy will be able to download these documents from the website. Alternatively, they will be able to contact Pupil Services to request provision of hard copy versions.

Any person wishing to apply for a local authority governor vacancy, or apply for re-appointment, will be required to complete and submit the local authority governor application form.

There is no automatic re-appointment of an existing local authority governor.

An existing local authority governor who wishes to apply for re-appointment will need to complete a fresh application, to ensure that the local authority is considering an application that reflects up-to-date information and details.

Existing local authority governors are expected to know when their current term of office is coming to an end or may seek this information from the clerk to the governing body and will not be informed by the local authority that the date is approaching.

All applicants will be requested to complete the equal opportunities and Welsh language abilities section of the application form; however, provision of this information is optional.

Applications must be **received** by the local authority by the published deadline date. Late applications will not be considered in the interests of fairness to those whose applications are received on time. The manner by which an application is submitted to the local authority is a matter of any applicant's personal choice. The local authority cannot be held responsible for non-receipt of any application.

Applications and any associated information relating to local authority governor vacancies and appointments will be administered and held by Pupil Services.

9. Removal of local authority governors

Any local authority governor may be removed from office, at any time, by the local authority, as such governors are appointed and not elected.

The power to remove a local governor will be used reasonably and lawfully.

Final decisions on the removal of any local authority governor will be made by the Corporate Director – Education and Family Support, in consultation with the Cabinet Member for Education.

If a decision is taken to remove a local authority governor, the local authority will notify the governor and the clerk to the governing body, in writing, of that decision.

10. Procedure for the appointment and removal of local authority governors

9.1 Panel for the appointment and removal of local authority governors (the panel)

Appendix 2 provides the full terms of reference of the panel.

The membership of the panel will be determined by the Corporate Director – Education and Family Support.

Only panel officers or nominated substitutes will be permitted to attend meetings of the panel. There will be no entitlement for any other person to attend meetings of the panel.

In summary, the panel will:

- consider applications for local authority governor vacancies and will make the recommendations on all appointments;
- determine if any successful applicant has specific training or support needs and how those will be met; and
- consider any instances where there is cause for concern in terms of a local authority governor's conduct, or ability to appropriately or effectively discharge their responsibilities as a local authority governor and may recommend the removal of a local authority governor.

9.2 Assessing applications and making appointment decisions

The panel will assess the information provided on the application form.

The panel will seek any additional information that it considered to be necessary to make a full assessment on the application. As examples, the panel may access information available to the local authority that confirms the level of attendance at past governing body meetings or confirms participation in training events.

The fact that an applicant may be an existing local authority governor and/or an existing local authority governor at the relevant school, will not in itself, attract any priority. Any person who is an existing local authority governor will be in a position to record information relating to their performance while in the role in the relevant sections of the application form.

The panel will take the following steps:

1. Check the information provided by an applicant in relation to the qualification/disqualification criteria (see section 3).

If the panel is not satisfied by the information provided, the application will not progress beyond this stage.

2. Check the information provided by an applicant in relation to whether they have an unresolved complaint with the school/governing body.

If applicants are considered by the school/governing body to be persistent or vexatious complainants the panel may determine to not progress the application beyond this stage given the potential conflict of interest.

3. Assess the information provided by an applicant, together with any additional information obtained, in relation to the essential attributes, knowledge and skills as detailed in the person specification (see Appendix 1).

If the panel is not satisfied that the information evidences that an applicant possesses all the essential attributes, knowledge and skills to at least a basic degree, the application will not progress beyond this stage.

The panel will assign a score to each criterion on a scale of 0 to 5.

The panel will combine the scores for the essential attributes, knowledge and skills. The highest scoring applicant will be recommended for appointed to the vacancy.

The panel may decide not to make a recommended appointment to a vacancy if no applicant meets a desired minimum score against the essential criteria.

4. In the event that that two or more applicants achieve the same highest score, the panel will assess the information provided by an applicant in relation to the desirable attributes, knowledge and skills as detailed in the person specification (see appendix 1).

The panel will assign a score to each criterion on a scale of 0 to 5.

The panel will combine the scores for the essential and desirable attributes, knowledge and skills. The highest scoring applicant will be recommended for appointed to the vacancy.

5. Following the appointment decision by the Corporate Director – Education and Family Support, the panel will assess whether the successful applicant would benefit from training and/or support to extend their awareness and understanding of the local authority's priorities and policies. If so, the panel will determine the nature and manner of the training and/or support that will be offered.

The decision of the Corporate Director – Education and Family Support is final and there will be no right of appeal for any applicant whose application is unsuccessful.

9.3 Considering whether there is a case for a local authority governor to be removed

The panel will:

1. Consider any instances where a concern is raised in terms of a local authority governor's conduct, or ability to appropriately or effectively discharge their responsibilities as a local authority governor.
2. Request all information that it considers necessary relating to a concern or concerns. The panel may commission an investigation when it considers this to be necessary and appropriate.
3. Following assessment of all the facts, the panel may recommend the removal of a local authority governor.

9.4 Actions following panel decisions

With regards to decisions on appointments, Pupil Services will:

1. Notify successful applicants appointed to local authority governor vacancies in writing, confirming the effective start date of the appointment and the end date of the term of office.
2. Provide an information pack.
3. Liaise with the appointed applicant regarding any training and/or support that the panel has determined would be beneficial.
4. Notify any unsuccessful applicants of the outcome of their applications.

On a quarterly basis, the Corporate Director – Education and Family Support will present a report for information to Cabinet, detailing the names of those individuals appointed to local authority governor vacancies and the relevant schools.

10.Appointment of additional local authority governors for schools causing concern

The School Standards and Framework Act 1998 gives local authorities powers of intervention in schools causing concern. One of those powers is for the appointment of additional local authority governors to strengthen the school's capacity to deal with the areas of concern. In all cases, such additional governors need to bring particular skills or experience to the governing body, and these will vary depending on the challenges apparent in the particular school in question. There is also likely to be some urgency about the appointments.

In consequence of these factors, the usual appointment procedure for a local authority governor is not a suitable mechanism for appointing additional local authority governors to support schools causing concern.

To enable the local authority to respond rapidly and appropriately in cases where there are significant concerns about a school, the power to appoint additional local authority governors to the governing body is delegated to the Cabinet Member for Education, in consultation with the Corporate Director – Education and Family Support. In the absence of the Cabinet Member for Education, the power to appoint additional local authority governors to the governing bodies of schools causing concern is delegated to the Corporate Director – Education and Family Support.

11.Data protection and information sharing

The local authority complies with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018. The full [Data Protection guidance and principles](#) of the local authority may be viewed on the website.

Any information recorded in or provided in support of a local authority governor application will be held electronically and used by the local authority for the purpose of processing the application. The information will be retained for a period that accords with the local authority's corporate retention schedule.

LOCAL AUTHORITY SCHOOL GOVERNOR

Role description

BACKGROUND

The need for school governing bodies is set out in law and their roles and responsibilities are also defined in legislation.

A school governing body should carry out its functions with the aim of taking a broadly strategic role in the running of the school.

A strategic role means the governing body decides what it wants the school to achieve and sets the strategic framework for getting there. It should establish the strategic framework by:

- setting aims and objectives for the school;
- adopting policies for achieving those aims and objectives;
- setting targets for achieving those aims and objectives; and
- reviewing progress towards achieving the aims and objective.

All school governing bodies must be a specific combination of appointed and elected governors of various categories. One of these categories is local authority governors.

Local authority governors are appointed by the local authority.

ROLE

A governing body needs to hear a range of views that will help to inform its discussions and decisions.

Local authority governors are representatives of the local authority and not delegates. They must act in the best interests of the school and wider community. They should represent the perspective and views of the local authority but cannot be directed by the local authority to take a particular stance on issues. However, local authority governors are expected to have an awareness and understanding of the local authority's priorities and policies to enable them to inform the debates and priorities at school level.

The local authority recognises that individual governors are bound by the corporate responsibilities of the governing body. The local authority may periodically provide its representative governors with information, but this does not replace the local authority's duty to communicate and consult with governing bodies.

Person Specification

An applicant will be asked to complete an application form and record information against each criterion, which demonstrates how they meet the criterion.

For some criteria, an applicant will be asked to record their own assessment of their level of knowledge/skill/ experience, and to provide supporting comments/information.

ESSENTIAL CRITERIA

- Eligibility – all of the eligibility criteria (known as qualification criteria) and none of the ineligibility criteria (known as disqualification criteria), as set out in the Government of Maintained Schools (Wales) Regulations 2005, have been met.
- Commitment to raising the aspirations and achievement of children and young people.
- Commitment to regular attendance at meetings of the governing body and full participation in discharging the governing body's responsibilities.
- Commitment to undertaking training that is mandatory under the Education (Wales) Measure 2011.
- Knowledge of the education system, and current education matters and developments.
- Knowledge of the local authority's role and functions in relation to education, including the promotion of the Welsh language and the Welsh Language in Education Strategic Plan.
- Knowledge and experience of the role of a local authority governor.
- Knowledge of the area and community that the relevant school serves.
- Knowledge of and commitment to equal opportunities.
- Knowledge/awareness of the local authority's priorities and policies.
- Excellent communication and interpersonal skills.
- The ability and commitment to work objectively, constructively and effectively with the headteacher.
- The ability and commitment to work objectively, constructively and effectively as part of a team, which will include with all the other members of the governing body.
- The ability to operate with tact and diplomacy.
- The ability to be objective and retain an open mind.
- The ability to absorb and assess information.
- Willingness to undertake any other training that may be non-mandatory but which the local authority recommends.

DESIRABLE CRITERIA

Knowledge/experience/skills relating to:

- Safeguarding.
- Teaching; the curriculum.
- The phases of education, particularly the relevant phase for the school being applied for.
- The school being applied for.
- The school's local community.
- The local/regional economy and commerce.
- Additional learning needs.
- Equality and diversity.
- Welsh language matters.
- Leadership.
- General school governance.
- Strategic planning.
- Self-evaluation or impact assessment.
- Performance management.
- Data analysis.
- Staff recruitment.
- Community relations.
- Coaching/mentoring.
- Negotiation.
- Mediation.
- Handling complaints and grievances.
- Health and safety.
- Risk management.
- Financial management.
- Procurement.
- Project management.
- Buildings and premises management.
- Human resources.
- Legislation and legal processes.
- Information communication technology
- Public relations, engagement, marketing.

PANEL FOR THE APPOINTMENT AND REMOVAL OF LOCAL AUTHORITY GOVERNORS

Terms of Reference

Role and purpose

The Panel for the Appointment and Removal of Local Authority Governors (the panel) will consider applications for local authority governor vacancies and will make recommendations on all appointments to the Corporate Director – Education and Family Support.

In assessing applications and making recommendations on appointments, the panel will ensure equality of opportunity between people with and without protected characteristics (the protected characteristics are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, religion and belief, sex and sexual orientation).

Following an appointment decision, the panel will assess whether a successful applicant would benefit from training and/or support to extend their awareness and understanding of the local authority's priorities and policies. If so, the panel will determine the nature and manner of the training and/or support that will be offered.

The panel will consider any instances where there is considered to be cause for concern in terms of a local authority governor's conduct, or ability to appropriately or effectively discharge their responsibilities as a local authority governor. Request all information that it considers necessary relating to a concern or concerns.

The panel may commission an investigation when it considers this to be necessary and appropriate. The panel may recommend the removal of a local authority governor to the Corporate Director – Education and Family Support and will provide the reasons for the recommendation.

Membership

The membership of the panel will be determined by the Corporate Director - Education and Family Support.

Attendance by agreed substitutes will be permitted.

Only panel members or agreed substitutes may attend meetings of the panel. There is no entitlement for any other person to attend meetings of the panel.

Quoracy

Every panel officer or the agreed substitute must be present for the panel meeting to be quorate.

However, panel members or agreed substitutes will not participate in the assessment of applications and decisions on appointments to schools, or the consideration of any concerns regarding an existing local authority governor, if they are also members of the relevant governing body. Any panel member or agreed substitute must withdraw from the meeting for the duration of the time that such matters are considered, and decisions made. The assessment of the applications and the decision on recommended appointment, or the consideration of concerns regarding an existing local authority governor, will be undertaken by the remaining panel officers and agreed substitutes.

Frequency of meeting

Panel meetings will be monthly.

Records

Notes of the panel's meetings will be prepared, which will cover principal discussion points and decisions.

The applications for vacancies and any associated documents considered by the panel will be administered and held by Pupil Services.

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	APPOINTMENT OF LOCAL AUTHORITY GOVERNORS
Report Owner / Corporate Director:	CORPORATE DIRECTOR – EDUCATION AND FAMILY SUPPORT
Responsible Officer:	EMMA GILES SENIOR PUPIL SERVICES OFFICER
Policy Framework and Procedure Rules:	There is no effect upon the policy framework or procedure rules.
Executive Summary:	<p>All governing bodies of maintained schools, including maintained nursery schools, in Wales must be constituted in accordance with The Government of Maintained Schools (Wales) Regulations 2005.</p> <p>All school governing bodies have four compulsory groups of governors. One of these groups is local authority governors. Local authority governors are appointed by the local authority.</p> <p>This report details recommendations for appointments to current local authority governor vacancies.</p>

1. Purpose of Report

- 1.1 The purpose of this report is to seek approval from Cabinet for the appointment of local authority governors to the school governing bodies listed at paragraph 3.1.

2. Background

- 2.1 In accordance with the Council's 'Guidance on the appointment of local education authority governors', approved by Cabinet on 14 October 2008, officers have considered applications received for current vacancies for local authority governor positions on school governing bodies (see paragraph 3.1 and Appendix A).

3. Current situation/proposal

- 3.1 For the two current local authority governor vacancies at the two schools in the table below, the applicants met the approved criteria for appointment as a local authority governor and there was no competition for the vacancies. Therefore, the recommended appointments are as follows:

Name of applicant	School
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Mrs Janet Jones	Newton Primary School
Ms Emma Williams	Pencoed Primary School

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1. An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

- 5.1 A Well-being of Future Generations (Wales) Act 2015 assessment has been completed. A summary of the implications from the assessment relating to the five ways of working is as follows:

Long-term

While it is desirable for local authority governors to have previous or relevant experience of the role, in the short term, the local authority may support any person for such an appointment who is interested in supporting schools, is not disqualified from being a school governor and is willing and able to dedicate the necessary time to the role.

Prevention

The local authority assesses the suitability of applicants for the local authority governor vacancy/vacancies applied for. The local authority, in conjunction with the Central South Consortium, supports governors with a comprehensive programme of both mandatory and voluntary training and access to resources, to enable them to develop and maintain their knowledge and skills, and be successful in fulfilling the role.

Integration

School governing bodies have a strategic role in running schools and ensuring that all pupils are supported to learn and achieve so that they can access opportunities for further learning and employment, know how to maintain their well-being, can play active roles in their communities, and can contribute positively to society as a whole.

Collaboration

School governing bodies have a strategic role in ensuring that schools safeguard the health and well-being of pupils and staff. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

Involvement

The local authority treats all applications for local authority governor vacancies fairly, to ensure equality of opportunity. School governing bodies have a strategic role in ensuring that schools safeguard the health and well-being of pupils and staff. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

- 5.2 A summary of the implications from the assessment relating to the Council's new seven well-being objectives, is as follows:

1 A County Borough where we protect our most vulnerable

School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have important responsibilities towards vulnerable children. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in this respect.

2 A County Borough with fair work, skilled, high-quality jobs and thriving towns

Access to good education and ensuring children have equal opportunities to realise their potential are critical to helping young people acquire the knowledge and skills they need for work. School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a strategic role in the running of a school, deciding what the school should achieve, and setting the strategic framework for getting there.

3 A County Borough with thriving valleys communities

Access to good education, raising standards of achievement and ensuring children have equal opportunities to realise their potential, wherever they may reside, are critical to helping young people acquire the knowledge and skills they need for work. School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a strategic role in the running of a school, deciding what the school should achieve, and setting the strategic framework for getting there.

4 A County Borough where we help people meet their potential

As school governing bodies have a strategic role in the running of a school, this includes ensuring that children and young people have access to good education and equal opportunities to realise their potential, and that our schools are safe, supportive environments providing high quality teaching.

5 A County Borough that is responding to the climate and nature emergency

School governing bodies and, therefore, those appointed to serve as governors, have a shared responsibility for ensuring that teaching and learning encompasses sustainability and global citizenship.

6 A County Borough where people feel valued, heard and part of their community

School governing bodies and, therefore, those appointed to serve as governors, have a role in ensuring that there is engagement with pupils and the community served by the school, listening to views and taking appropriate actions. School governing bodies have a responsibility to support supporting diversity and inclusion, and addressing discrimination.

7 A County Borough where we support people to live healthy and happy lives

School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a shared responsibility for ensuring that teaching and learning encompasses healthy eating and physical activity, personal and social development, self-worth and well-being.

6. Climate Change implications

- 6.1 School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have a shared responsibility for ensuring that teaching and learning encompasses sustainable development and global citizenship. Governing bodies also have a strategic role in considering the impact of net zero carbon and how to deliver this important national initiative.

7. Safeguarding and Corporate Parent Implications

- 7.1 School governing bodies and, therefore, those appointed to serve as governors on governing bodies, have important responsibilities towards vulnerable children. The local authority, in conjunction with the Central South Consortium, provides training to governors to enable them to develop and maintain their relevant knowledge, skills and effectiveness in safeguarding and promoting the welfare of vulnerable children and young people.

8. Financial Implications

- 8.1 There are no financial implications regarding this report.

9. Recommendation

- 9.1 Cabinet is recommended to approve the appointments detailed at paragraph 3.1.

Background documents

None

Appendix A

The following table represents current and future local authority governor vacancies (up to the end of February 2024) subject to the approval of the recommended appointments in paragraph 3.1.

Name of school	Number of current and future vacancies	Latest date for submission of an application
Betws/Blaengarw Primary Federation	2 (current)	16 February 2024
Brackla Primary School	2 (current)	16 February 2024
Brynmenyn Primary School	1 (current)	16 February 2024
Bryntirion Infant School	1 (current)	16 February 2024
Caerau Primary School	2 (current)	16 February 2024
Corneli Primary School	2 (current)	16 February 2024
Croesty Primary School	1 (current)	16 February 2024
Cwmfelin Primary School	1 (current)	16 February 2024
Ffaldau Primary School	2 (current)	16 February 2024
Garth Primary School	1 (current)	16 February 2024
Litchard Primary School	1 (current)	16 February 2024
Maes yr Haul Primary School	1 (current)	16 February 2024
Mynydd Cynffig Primary School	1 (current)	16 February 2024
Nantyffyllon Primary School	2 (current)	16 February 2024
Nottage Primary School	3 (current)	16 February 2024
Penybont Primary School	1 (current)	16 February 2024
Pîl Primary School	1 (current)	16 February 2024
Plasnewydd Primary School	1 (current)	16 February 2024
Trelales Primary School	1 (current)	16 February 2024

Tremains Primary School	1 (current)	16 February 2024
Tynyrheol Primary School	2 (current)	16 February 2024
Ysgol Bryn Castell	1 (current)	16 February 2024
Ysgol Gynradd Gymraeg Calon y Cymoedd	1 (current)	16 February 2024
Archbishop McGrath Catholic High School	1 (current)	16 February 2024
Brynteg School	1 (current)	16 February 2024
Cynffig Comprehensive School	1 (current)	16 February 2024
Coleg Cymunedol Y Dderwen	1 (current)	16 February 2024
Porthcawl Comprehensive School	1 (current)	16 February 2024
Ysgol Gyfun Gymraeg Llangynwyd	1 (current)	16 February 2024

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	SCHOOL ADMISSIONS POLICY 2025-2026
Report Owner / Corporate Director:	CORPORATE DIRECTOR – EDUCATION AND FAMILY SUPPORT
Responsible Officer:	EMMA GILES SENIOR PUPIL SERVICES OFFICER
Policy Framework and Procedure Rules:	There is no effect upon the policy framework or procedure rules.
Executive Summary:	<p>The admission of pupils is a statutory responsibility, which supports the raising of educational standards and the well-being of children, young people and their local communities.</p> <p>The applicable legislation requires that school admission arrangements for 2025-2026 are determined by 15 April 2024.</p>

1. Purpose of Report

- 1.1 The purpose of this report is to seek Cabinet approval for the School Admissions Policy 2025-2026 at Appendix A.

2. Background

- 2.1 Welsh Government's School Admissions Code 2013 (the Code) imposes requirements on local authorities and admission authorities, regarding the discharge of duties in respect of school admissions. The Council must act in accordance with the Code, as determined by the School Standards and Framework Act 1998.
- 2.2 As part of the statutory process, the local authority has a duty to consult with stakeholders as identified in the Code. This includes the governing bodies of all schools in Bridgend (including voluntary-controlled and voluntary-aided schools), all neighbouring local authorities and the bodies representing the religion or religious denomination of faith schools in Bridgend.
- 2.3 The local authority is required to publish annually an admissions policy and guidance on the admission arrangements for its schools. These are published on the local authority's website. The policy and arrangements include details of the published admission number (PAN) for each school in Bridgend for which the local

authority is the admission authority. The PAN for a school is the number of pupils that can be admitted to any year group for pupils of statutory school-age.

3. Current situation/proposal

- 3.1 The Bridgend Admissions Forum agreed the draft School Admissions Policy for 2025-2026, as per the requirements under the Code, in October 2023.
- 3.2 The aforementioned consultation on the 2025-2026 policy took place with all parties between 8 January 2024 and 2 February 2024.
- 3.3. Two responses to the consultation were received.
- 3.4 The first response was a request regarding a minor point of clarity in relation to section 3.1 of the School Admissions Policy 2025-2026. An amendment was made to the title to remove the reference to voluntary-aided schools, for which the local authority is not the admission authority.
- 3.5 The second response was from a Bridgend school and was a request to consider the inclusion of cross-border admission arrangements within the policy for pupils within the area of Neath Port Talbot Council, given the transfer of pupils from that local authority to some Bridgend schools. However, where cross-border arrangements are currently referenced in respect of other local authorities in the policy, for example for Bridgend pupils attending schools in the area of Rhondda Cynon Taff County Borough Council, those arrangements pertain to school transport only. As a cross-border arrangement does not currently exist for pupils from Bridgend attending schools in the area of Neath Port Talbot Council's or vice versa and as a fundamental principle of the School Admissions Code is to allow parental choice, no amendment to the policy was considered to be required.
- 3.6 The PAN for a school represents the number of pupils that can be admitted to any year group for statutory-age pupils. The PAN for each school reflects the outcome of calculations undertaken in accordance with the capacity assessment method set out in the Welsh Government guidance document 'Measuring the capacity of schools in Wales'. There are no proposed changes to the PAN of any maintained school, for which the local authority is the admission authority.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1. An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language. It is therefore not necessary to carry out a full EIA on this policy or proposal.
- 4.2 It is a statutory duty that admission authorities are mindful of their duties with regards to equalities legislation. The School Admissions Policy 2025-2026 adheres to these requirements.
- 4.3 A Welsh Language Impact Assessment has been carried out (**Appendix B**). The outcome of the assessment is that the local authority's proposed School Admissions Policy for 2025-2026 should have a neutral impact on opportunities for persons to use the Welsh language, opportunities to promote the Welsh language, the

Council's compliance with the statutory Welsh Language Standards and treating the Welsh language no less favourably than the English language.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

- 5.1 The Well-being of Future Generations (Wales) Act 2015 assessment has been completed. A summary of the implications from the assessment relating to the five ways of working is as follows:

Long-term

The school admissions policy sets out how the local authority will balance the discharge of its statutory duty in relation to parental preference, the need to safeguard the delivery of effective education and the safety of pupils, and the need to support pupils in particular circumstances (for example, learners with specific vulnerabilities), in circumstances where the applications for places at a school exceed the number of available places.

Prevention

Consultation on the school admissions policy allows stakeholders to raise issues or make comments on proposals, for consideration of appropriate actions.

Integration

The school admissions policy supports the provision of education in the communities in which pupils live.

Collaboration

Each year, the local authority works in conjunction with key stakeholders to develop proposed school admission arrangements, for those schools for which it is the admissions authority.

Involvement

In accordance with the specified requirements of the Education (Determination of Admission Arrangements) (Wales) Regulations 2006 and the School Admissions Code 2013, the local authority consults each year on the proposed admission arrangements for those schools for which it is the admissions authority. Consultation takes place beginning two years before the school year in which the admission arrangements will apply.

- 5.2 A summary of the implications from the assessment relating to the Council's new seven well-being objectives, is as follows:

1 A County Borough where we protect our most vulnerable

The local authority's School Admissions Policy 2025 -2026 adheres to the statutory requirements to ensure that admissions for vulnerable learners are processed as detailed in the Welsh Government's School Admissions Code 2013. Section 8 of the School Admissions Policy (see Appendix A) ensures fair access to mainstream school places for individual children within the specific groups, in accordance with the defined terms of reference.

2 A County Borough with fair work, skilled, high-quality jobs and thriving towns

Access to good education and ensuring children have equal opportunities to realise their potential are critical to helping young people acquire the knowledge and skills they need for work. The School Admissions Policy 2025-2026 ensures the statutory requirements are met to provide an admissions system that is accessible to all, encompassing the principles of fairness, consistency and openness across all aspects of schools' admissions. It plays a crucial role in delivering equality of opportunity.

3 A County Borough with thriving valleys communities

Access to good education, raising standards of achievement and ensuring children have equal opportunities to realise their potential, wherever they may reside, are critical to helping young people acquire the knowledge and skills they need for work. The School Admissions Policy 2025-2026 ensures the statutory requirements are met to provide an admissions system that is accessible to all, encompassing the principles of fairness, consistency and openness across all aspects of schools' admissions. It plays a crucial role in delivering equality of opportunity.

4 A County Borough where we help people meet their potential

The School Admissions Policy 2025-2026 ensures that children and young people have access to good education and equal opportunities to realise their potential.

5 A County Borough that is responding to the climate and nature emergency

Once approved and published, the School Admissions Policy 2025-2026 is accessible to all residents online at: <https://www.bridgend.gov.uk/residents/schools-and-education/school-admissions/apply-for-admission-to-school/>. This helps reduce the local authority's carbon footprint.

6 A County Borough where people feel valued, heard and part of their community

The School Admissions Policy 2025-2026 has regard to the general principle that pupils are to be educated in accordance with the wishes of their parents/carers, so far as that would be compatible with the provision of efficient education and the avoidance of unreasonable public expenditure (section 9 Education Act 1996).

7 A County Borough where we support people to live healthy and happy lives

The local authority's School Admissions Policy 2025-2026 allows children and young people by providing access to schools and education where they can learn to thrive and make the best use of their talents, live healthy and safe lives, be confident and caring individuals and know and receive their rights.

6. Climate Change Implications

- 6.1 The local authority, as the admission authority has a strategic role in considering the impact of net zero carbon and how to deliver this important national initiative.

7. Safeguarding and Corporate Parent Implications

- 7.1 The Education (Admission of Looked after Children) (Wales) Regulations 2009 places a duty on the admission authority to admit children looked after by the local authority, where an application is made by the corporate parent on their behalf. The School Admissions Policy 2025-2026 ensures that the local authority adheres to this statutory requirement.

8. Financial Implications

- 8.1 There are no financial implications regarding this report.

9. Recommendations

- 9.1 Cabinet is recommended to approve the Schools Admissions Policy 2025-2026 at Appendix A.

Background documents

None

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Mae'r ddogfen hon ar gael yn Gymraeg. / This document is available in Welsh.



School Admissions Policy 2025-2026

(1 September 2025 – 31 August 2026)

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1. The admission authority

The entry of children to schools is controlled and administered by an 'admission authority'. In the case of community schools in Bridgend, the admission authority is Bridgend County Borough Council (also referred to in this document as 'the local authority').

In accordance with the Education (Relevant Areas for Consultation on Admission Arrangements) Regulations 1999, the relevant area for the admission authority is the geographical area of the County Borough of Bridgend.

Where the local authority is the admission authority, the school's governing body is under a duty to implement the local authority's decisions on applications, and to act in accordance with the local authority's admission arrangements.

The local authority continuously reviews and reserves the right to amend its admissions procedures for statutory and non-statutory education.

The local authority has no arrangements for the provision of education at schools not maintained by the local authority.

1.1 Admission to voluntary controlled schools

The one voluntary controlled school in the Bridgend County Borough is Pen y Fai Church in Wales Primary School, which is financed by the local authority. The admissions criteria are consistent with that of the local authority, as detailed in this policy, and with the Trust Deed of the school. Appeal arrangements are managed by the local authority and are consistent with the provision of the Trust Deed.

1.2 Admission to voluntary aided schools

There are five voluntary aided schools in the Bridgend County Borough, which are financed largely by the local authority. These are:

1. St Mary's Catholic Primary School
2. St Mary's and St Patrick's Catholic Primary School
3. St Robert's Roman Catholic Primary School
4. Archdeacon John Lewis Church in Wales Primary School
5. Archbishop McGrath Catholic High School

The governing body of each voluntary aided school is the admission authority with responsibility for all admission arrangements. Parents/carers who wish to seek admission/s to these schools will need to contact the school/s directly for further information.

1.3 Admissions to sixth forms

The local authority is the admitting authority for Post-16 admissions to sixth forms in the community schools within the Bridgend County Borough. However, the individual schools administer the admission arrangements on behalf of the local authority. Therefore, applications in this category should be made directly to the school.

While the local authority has a policy of open access to schools' sixth forms, the individual schools are responsible for determining and issuing entry criteria on sixth-form admissions.

Admission arrangements for other Post-16 further education institutions are determined by those institutions and applications should be made directly to the institution/s concerned.

1.4 Admissions to special schools

The two special schools in the Bridgend County Borough are Heronsbridge School and Ysgol Bryn Castell. Admissions to these schools are not included within, or subject to the provisions of this policy.

2. Parental preference

2.1 The duty to comply with parental preference

In relation to admissions to primary schools (excluding nursery classes), junior schools and secondary schools (including sixth-forms), the local authority has a statutory duty to have regard to the general principle that pupils are to be educated in accordance with the wishes of their parents/carers, so far as that would be compatible with the provision of efficient education and the avoidance of unreasonable public expenditure (S.9 Education Act 1996).

The local authority applies the same principle of parental preference to applications for non-statutory, nursery education in a local authority-maintained school.

The duty of the local authority to comply with parental preference does not apply where:

1. To admit would be incompatible with the statutory duty to meet infant class size regulations.
2. To admit the child would prejudice the provision of efficient education or efficient use of resources.

3. Where arrangements for entry to a school's sixth form are based wholly on selection by reference to ability or aptitude and compliance with the preference would be incompatible with selection under those arrangements.
4. The child has been permanently excluded from two or more schools. Where this is the case, the local authority is not required to comply with parental preference for a school place for a period of two years from the first school day of the second exclusion.

This disapplication from the requirement to comply with parental preference does not apply to:

- pupils who were below compulsory school age when they were excluded;
- pupils who were reinstated after permanent exclusion or pupils who would have been reinstated following a permanent exclusion had it been practicable to do so;
- pupils with statements of special educational need;
- pupils who are looked after (the application for admission must be made by the corporate parent), or previously looked after children (the application for admission must be accompanied by evidence of the previously looked after status).

2.2 Compliance with parental preference

Within the Bridgend County Borough, each school has an area it serves (its catchment); however, the local authority must allow all parents/carers the opportunity to express a positive preference for the school they wish their child to attend. While most parents/carers are happy to choose their catchment school, it is necessary for that school to be selected by parents/carers on a school admission or in-year school admission/transfer application. The application allows parents/carers to list more than one school in order of preference. The local authority will offer a place at the highest available preferred school.

The local authority is committed to the principle of providing local schools for local children and will make every effort to ensure that parents/carers are able to secure a place for their child/ren at the catchment school, where parents/carers have expressed a positive preference for that school. However, parents/carers must not automatically assume that a place will be available for their child at their catchment school, or any particular school.

The local authority will meet the preferences for admission expressed by parents/carers ahead of those who have expressed no preference. Consequently, for the admissions rounds, parents/carers must ensure they record their preference/s on the school admission application and that the application is submitted to the local authority by the stated deadline.

2.3 Changes to an expressed parental preference

For admission rounds, if the parent/carers wishes to make a change to the school preference/s after the application has been submitted to the local authority:

1. The change must be notified to the local authority **in writing** (email or letter).
2. If the change is notified to the local authority **before** the published closing date for the admission round, the change will be taken into consideration in the application of oversubscription criteria and the allocation of places.
3. If the change is notified to the local authority **after** the closing date for the admission round, the school preference/s recorded on the application will be used in the application of oversubscription criteria and the allocation of places. The parent/carers will have the option to complete and submit a late application if the allocated place is at a school that is no longer the preferred school, which would be subject to the provisions relevant to late applications (see section 13.1). However, in these circumstances, the local authority will offer the applicant the option to, instead, maintain the original application and school preference/s.

The admission application form will indicate the maximum number of school preferences that a parent/carers can express. A parent/carers may choose to express a lesser number of school preferences. However, in such a situation, if the local authority cannot offer a place at any preferred school, the local authority will take no further action in respect of the application. The parent/carers will be required to complete and submit a new application for any alternative school, which will be processed as a late application in accordance with the provisions of section 13.1.

3. School catchment areas

3.1 Welsh-medium schools

There are no catchment areas for the Welsh-medium schools within Bridgend.

3.2 All other schools

[School catchment area maps](#) are published on the local authority's website.

Catchment areas are subject to change, with any changes being subject to consultation prior to implementation.

There is no right to, or guarantee of, an offer of a place at a child's catchment area school.

4. School capacity and published admission number

The capacity of a school is the number of pupil places it contains.

Welsh Government has published a capacity calculation methodology for all schools. This aims to provide a robust and consistent method of assessing the pupil capacity of all community, voluntary aided, voluntary controlled and foundation schools in Wales.

A school's calculated capacity is based on existing accommodation at a school and its usage. For statutory-age year groups (Reception to Year 11) the calculated capacity informs the published admissions number for a school.

Appendix A provides the published admission numbers for all schools for which the local authority is the admitting authority.

For a normal year of entry (that is, Reception and Year 7), the local authority must admit pupils up to the published admission number (with the exception of twice-excluded pupils – see section 2).

For all other years, it is not a statutory requirement that the local authority admits pupils up to the published admission number, although the local authority will generally do so. However, in the case of infant classes (Reception, Year 1 and Year 2), infant class size legislation is relevant (see section 5). The local authority is entitled to refuse admission for places in any year other than the normal year of entry (that is, Reception), if offering a place would result in class size prejudice (for example, necessitating that the school employs an additional teacher or creates another classroom when it does not have the resources to do so). This means that the local authority may refuse admission to Year 1 and Year 2 if offering a place would result in class size prejudice, even if the admission number has not been reached in relation to these year groups.

As the published admission number reflects the school's ability to accommodate pupils, the local authority will only exceed the published admission number in exceptional circumstances.

5. Infant class size limit

In order to improve educational standards in schools, The School Admission (Infant Class Size) (Wales) Regulations 2013 limit the number of children in reception, Year 1 and Year 2 classes to 30 when a single qualified teacher is present.

The local authority will refuse admission to classes in these year groups if an admission would result in the infant class size limit being breached, giving rise to infant class size prejudice, unless the situation is such that an exception to the infant class size limit is permitted by the legislation.

In relation to the Reception year, infant class size prejudice does not arise if the number of pupils in the Reception year has not reached the school's published admission number.

Decisions on the structure of classes at a school are reserved to the headteacher. If a headteacher decides to operate a mixed-age class where some of the pupils in the class are Reception, Year 1 or Year pupils, the infant class size limit will only apply if the majority of the pupils in the class are Reception, Year 1 or Year 2 pupils.

6. Welsh-medium education

There are four Welsh-medium primary schools and one Welsh-medium secondary school located within Bridgend County Borough.

Admission to the Welsh-medium schools in the Bridgend County Borough is controlled by the provisions and criteria specified within this policy.

There are no catchment areas for the Welsh-medium schools in Bridgend.

A parent/carer can make an application for a place for their child at any Welsh-medium school within the county. However, if a parent/carer chooses to apply for place at a Welsh-medium school that is not the nearest Welsh-medium school to the child's place of ordinary residence, and that application is successful, there is no entitlement to free home-to-school transport to that requested school.

Eligibility for school transport only applies where the child's place of ordinary residence is more than two miles from the nearest Welsh-medium primary school or three miles from the nearest Welsh-medium secondary school.

7. Arrangements with other local authorities

The local authority has made the following arrangements with Rhondda Cynon Taf County Borough Council, where surplus admission places are available:

1. Parents/carers of pupils who live within the catchment area of Abercerdin Primary School may apply for a place for their child at Tonyrefail Comprehensive School and, if successful, Bridgend County Borough Council will be responsible for transport.
2. Parents/carers of pupils who live in Rhondda Cynon Taf may apply for a place for their child at Pencoed Comprehensive School and, if successful, Rhondda Cynon Taf County Borough Council will be responsible for transport .

8. Ensuring fair access

Particular considerations apply in respect of specific groups of children, as detailed below.

The local authority has a Mainstream Fair Access Panel. The panel can consider and make decisions on applications for mainstream school places for individual children within these specific groups, in accordance with the defined terms of reference.

8.1 Children from overseas and UK children living abroad

Welsh Government has issued guidance for admission authorities when processing applications for overseas children. The local authority will process all such applications in accordance with the published guidance.

8.2 Children in receipt of a statement of special educational needs (SEN) or a local authority-maintained individual development plan (IDP)

Where a mainstream place in a community school is the named placement in a final statement of SEN or a local authority-maintained IDP, following consultation, the local authority will admit the child to that school.

8.3 Children with additional learning needs (but without a statement of SEN or a local authority-maintained IDP)

Applications in respect of such children will be considered in the same way as all applications on the basis of the procedures and admission criteria set out in this policy.

If a child is currently being assessed under the ALN system and, at a later date, the local authority concludes that the child should have a local authority-maintained IDP, the appropriate school placement will be addressed as part of that statutory process.

8.4 Children with disabilities

The local authority will comply with the reasonable adjustments duty owed to disabled pupils, as defined in the Equality Act 2010.

8.5 Children with challenging behaviours

The local authority will not refuse to admit a child on the basis of his/her behaviour. Such children will include those who are considered to be potentially disruptive, exhibiting challenging behaviours or those who may be considered as requiring assessment for special educational needs.

After admission, a school may consider such disciplinary action as appropriate, in response to challenging behaviour. However, children exhibiting challenging behaviours

may be disabled as defined by the Equality Act 2010 and require reasonable adjustments to be made for them in school.

8.6 Looked after and previously looked after children

In respect of looked after children, the following provisions apply even if the corporate parent is Bridgend County Borough Council.

Admissions rounds

Applications in respect of looked after and previously looked after children are prioritised under the applicable oversubscription criteria, **subject to**:

1. The application for a looked after child is completed and submitted by the corporate parent (that is, the local authority with responsibility for looking after the child) and supporting evidence is provided (a Care Order or Interim Care Order).
2. The application for a previously looked after children is accompanied by supporting evidence from the former corporate parent.

In-year admissions/transfers

In accordance with the statutory School Admissions Code 2013, where in-year admission/transfer of a looked after child is being sought, the corporate parent must consult with the local authority before making the application. This is to ensure the appropriateness of the preferred school in light of the child's background and circumstances. This consultation and completion of an application is also required in respect of looked after children who have been permanently excluded from two or more schools.

Additionally, in the case of a looked after child who has been permanently excluded from two or more schools, the corporate parent must also consult with the governing body of the identified school.

In both instances, the consultation need not be onerous.

For applications for in-year admission/transfers in respect of looked after children, a place will be offered at the agreed school and an exception to the infant class size limit (if relevant) will be applied, **subject to** the application having been completed and submitted by the corporate parent (that is, the local authority with responsibility for the child) and supporting evidence having been provided (a Care Order or Interim Care Order).

For applications for in-year admission/transfers in respect of previously looked after children, a place will be offered at the preferred school and an exception to the infant class size limit (if relevant) will be applied, **subject to** the application being accompanied by supporting evidence from the former corporate parent.

The relevant supporting evidence referred to above must be submitted with the application.

8.7 Gypsy, Roma and Traveller children

When considering admission applications relating to Gypsy and Traveller children, the local authority will take account of Welsh Government Circular No: 003/2008 (Moving Forward – Gypsy Traveller Education) and sections 3.25 and 3.26 of the statutory School Admissions Code for Wales, 2013.

8.8 Children of serving UK service personnel and other serving Crown Servants (including diplomats)

‘UK service personnel’ refers to persons serving in the military forces. ‘Crown Servants’ are officers of the UK government, including diplomats.

There is no automatic right to a place at a preferred school for children of serving UK service personnel and other serving Crown Servants.

The local authority will accept a ‘unit’ postal address for applications from serving service personnel in the absence of a new home postal address.

For normal admissions rounds, the local authority will treat children of serving UK service personnel and serving Crown Servants as if they are already resident at a future address **provided that** the application is accompanied by an official Ministry of Defence (MOD) or Foreign and Commonwealth Office (FCO) letter declaring a return date and confirmation of the new home. The local authority will allocate a school place in accordance with the applicable criteria for the relevant admission round.

In respect of in-year admission/transfer applications for children of serving UK service personnel and serving Crown Servants:

- such children will be given ‘excepted status’ for infant class size limit purposes (if relevant), if admitted to a preferred school;
- if the application is unsuccessful and a place at the preferred school is refused, the parents/carers may appeal against the decision and any appeal hearing would be heard as a normal prejudice appeal.

Applications for children of former UK service personnel or former Crown Servants will be treated as all other applications.

8.9 All vulnerable or hard-to-place children

The provisions of this policy will apply. Additionally, the local authority has a fair access protocol and a fair access panel that may consider the admissions of such children.

8.10 School 'managed moves'

The local authority has a separate policy for the managed moves (transfers) of pupils between schools.

Managed moves of pupils are treated differently to regular admissions. However, the local authority will apply the provisions of this policy in the identification of a suitable school or schools.

The pupil will remain on roll at the current school during the managed move period. At the end of the managed move period, if the managed move is deemed successful, the pupil will be placed on roll at the receiving school, subject to the parent/carer completing a school admission application requesting the school. If the managed move is deemed to have been unsuccessful, the pupil will return to the school at which they are on roll.

The Managed Move Policy does not apply in any instances where the parent/carer completes a school admission application in advance of the managed move; the School Admissions Policy applies in all such cases.

9. Requests for admission outside of the normal age group

Occasionally, a parent/carer or school may seek a place outside of the chronological age group for a child who they consider to be gifted/talented or experiencing problems, or who has missed part of a school year, for example, due to ill health.

The local authority's Mainstream Fair Access Panel will consider each request carefully and make decisions on the basis of the circumstances of each case. The panel will consider what is most beneficial for the child and, in every case, will consider information from appropriate parties to inform its decision.

If the panel decides that an out-of-year group application is appropriate, but that application is refused due to no places being available in the requested year group at the school, the parents/carers have a statutory right of appeal. However, there is no right of appeal if the local authority has offered a place but not in the requested year group (that is, where the place offered is in the correct year group for the child's chronological age).

If the panel decides that an out-of-year group application is appropriate and the application is for a Part-time Nursery place in the following January or April, or a Full-time Nursery, Reception, junior school Year 3 or secondary school Year 7 place from the following September, the application will be subject to, and considered in accordance with, the conditions and criteria applicable to those admissions rounds.

10. Information or circumstances that the local authority does not consider when making admission decisions

The following is not an exhaustive list, but details the principal information and circumstances that have no bearing on admission decisions:

- Any school that the child has previously attended.
- Any particular school that the child might attend in the future.
- A parent/carers communicating to any school that there is an intention to apply for a place at the school. This would include any instance when a parent/carers believes that they have 'registered' their child's name for a place at the school.
- An invitation to, or attendance by a child, at a 'taster'/transition day at any school.
- Allowance by any school of a visit by the parents/carers and/or child.
- Any indication either explicitly given, or assumed by a parent/carers to have been given, by a school that there are places available at the school in any year group, with the exception of sixth form places.

11. Equalities

The local authority's admissions policy and arrangements seek to achieve full compliance with all relevant legislation and guidance, with regard to equal opportunities and human rights (Equality Act 2010, the Human Rights Act 1998, the Welsh Language Act 1993 and the Welsh Language (Wales) Measure 2011).

The local authority wants its services to be accessible to the whole community and will challenge discrimination in our communities, whether it is based on a person's transgender status, race, sex, disability, age, sexual orientation, religion or belief, pregnancy and maternity marriage or civil partnership.

The local authority's Corporate Equality Scheme sets out how the local authority will comply with its Public Sector Equality Duty in the exercise of its functions, having due regard to the need to:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited under the legislation;
- advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and
- foster good relations between persons who share a relevant protected characteristic and persons who do not.

12. Data protection and information sharing

The local authority complies with the General Data Protection Regulation (GDPR) and the Data Protection Act 2018. The full [Data Protection guidance and principles](#) of the local authority may be viewed on the website.

Any information recorded by an applicant in a school admission application will be held electronically and used by the local authority for the purpose of processing the application.

The local authority will share the information provided in a school admission application with the relevant school/s in accordance with the [Fair Processing Statement – Education and Family Support](#).

The local authority will investigate any school admission applications where there is doubt about the information that has been provided. This will be to assist in the prevention and detection of fraud for the purpose of gaining an unfair advantage in the school application system and under Schedule 2, part 1, 2(1) of the Data Protection Act 2018.

13. Admissions rounds

13.1 Submission of applications

The requirement to apply for a school place

A school admission application **must** be completed by a parent/carer.

A separate application is required for each child.

A child will not be permitted to start at a school until an application has been received and processed by the local authority, and a school place has been offered by the local authority.

The applicant

In respect of applications for nursery children and children of statutory school-age, the application must be made by a 'parent' of the child, as defined by Section 576 of the Education Act 1996. This states that a 'parent', in relation to a child or young person, includes any person who is not a biological parent but who has parental responsibility, or who has care of the child.

Therefore, for the purposes of education law, a 'parent' is deemed to include:

- all biological parents, whether they are married or not;

Appendix A

- any person who, although not a biological parent, has parental responsibility for a child or young person - this could be an adoptive parent, a step-parent, guardian or other relative;
- any person who has care of a child or young person but is not a biological parent and does not have parental responsibility.

A person typically has care of a child or young person if they are the person with whom the child lives, either full or part-time and who looks after the child, irrespective of what their biological or legal relationship is with the child.

The local authority uses the term 'parent/carer' throughout this policy to reflect the legal definition of 'parent', as detailed above.

The local authority will only accept an application from a person who is not a parent/carer if it is accompanied by an appropriate written authorisation from a parent/carer.

An applicant will be required to make a declaration of the relationship to the child and provide such information as the local authority requires, including documentation, evidencing that relationship, at the time the admission application is submitted.

The local authority expects that the parents/carers of a child reach agreement about the preferred school/s and who will submit the application, before a school admission application is submitted. The local authority will not intervene in disputes between parents/carers over school applications and will expect that these are resolved privately. If parents/carers cannot agree and a Court order stating who should be making the application and what the school preference/s should be has not been obtained, the local authority will proceed to accept the application from the parent/carer in receipt of Child Benefit for the child.

Applications in respect of Post-16 admissions/transfers can be submitted by a parent/carer or the learner.

How to apply

Applications can be completed online through sign up to 'My Account' on the Bridgend County Borough Council website.

Any parents/carers who do not have access to their own computer/laptop or smart phone, may use the computers available within the libraries in the county borough to sign up to My Account and complete a school admission application. A parent/carer who remains unable to create a My Account and access the relevant online school admission application, may contact the local authority and request a hardcopy school admission application.

If parents/carers permit completion and submission of a school admission application for their child through the My Account of a third party, the My Account holder will be deemed to be submitting the application on behalf of, and with the full authority of, the

parents/carers of the child. In these circumstances, the parents/carers will be considered as accepting responsibility for the consequence of any errors or deficiencies in the completion of the application and/or the submission of the application.

The local authority accepts no responsibility for the non-receipt of an application that is not submitted through the online facility.

If the local authority's arrangements for submission of admission applications should change before or during the effective dates of this policy, details will be published in the Starting School Prospectus 2025-2026 and on the [local authority's website](#).

Late applications

An application should be submitted in time for **receipt** by the local authority by the relevant published closing time and date.

The local authority will accept late applications that are received after the relevant published closing date **provided that** the application is received **before** the local authority has commenced its allocation of places in preparation for the admissions offer (this date will be determined by the local authority at the time but will be at least one month before the published offer date for places) **and** the local authority is satisfied as to the parents/carers' reasons for the late application.

Applications in respect of looked after children and previously looked after children, or children with a statement of SEN or an IDP that names a specific school, will **not** be treated as late applications regardless of when the application is received.

All other late applications will not be included in the allocation of places that will be notified to applicants on the relevant published offer date.

Late applications that are not included in the allocation of places for offer day will be processed by the local authority after the relevant published offer date and in order of date and time received. Oversubscription criteria will not apply; if a place is available in the preferred school at the time the application is processed, it will be offered. Therefore, late applicants may find that their preferred school is already full, even if the school is their catchment school.

No applications for 2025-2026 admissions rounds that are received by the local authority after 31 August 2025 will be processed. After this date, an in-year admission/transfer application is required and all considerations applicable to in-year admission/transfer applications will be relevant. The local authority does not accept in-year admission/transfer applications received more than two calendar months in advance of the requested start date. Consequently, all applications for a Part-time Nursery class in April 2026 that are received after 31 August 2025 will not be processed until the Spring term 2026.

13.2 Nursery class admissions rounds

Nursery education is non-statutory; however, in Wales, children are entitled to a free, part-time, early-years education place from the start of the term following their third birthday. The place can either be at a local authority-maintained school ('LA-maintained'), or within the non-maintained sector with a registered early year's provider.

This policy applies only to admissions to nursery classes in LA-maintained schools for which the local authority is the admission authority. Parents/carers who wish to apply for a nursery place at a voluntary aided school must approach that school directly.

Places are part-time for three-year-olds (Nursery Year 1) and full-time for four-year-olds (Nursery Year 2). Although nursery education is non-statutory, the local authority expects all children who are offered a Part-time Nursery place to attend for five half days per school week and all children who are offered a Full-time Nursery place to attend for five full days per school week.

A school admission (nursery) application **must** be completed by the parents/carers of eligible children for admissions to nursery classes in LA-maintained schools.

A child will only be permitted to attend a nursery class if the relevant application has been submitted **and** the local authority has formally offered a place at that school.

Children who are admitted to a Part-time Nursery class **do not have an automatic right to a Full-time Nursery place at the same school.** All parents/carers of children attending a Part-time Nursery class, whether residing within or outside the defined catchment area, must complete a school admission application for a Full-time Nursery place, at the appropriate time, indicating their school preference/s.

Children who are admitted to a Full-time Nursery class **do not have an automatic right to a Reception year place at the same school.** All parents/carers of children attending a Full-time Nursery class, whether residing within or outside the defined catchment area, must complete a school admission application for a Reception place, at the appropriate time, indicating their school preference/s.

As nursery education is non-statutory, parents/carers have **no right of appeal** in respect of decisions on nursery admissions.

Timetable for nursery admissions 2025-2026

The timetable for nursery admissions is not governed by the School Admissions Code 2013. The local authority's expected timetable for processing applications for nursery admissions for 2025-2026 is as follows:

Full-time Nursery class admissions - pupils born between 1 September 2021 and 31 August 2022, starting in a Full-time Nursery class in September 2025:

Action	Date
Opening date for submission of applications	10am Monday, 6 January 2025
Closing date for receipt of applications by the local authority	4pm Friday, 4 April 2025
Notification to applicants of offer or refusal of places (the 'offer date')	Friday, 30 May 2025

Part-time Nursery class admissions - pupils born between 1 September 2022 and 31 December 2022, starting in a Part-time Nursery class in January 2026:

Action	Date
Opening date for submission of applications	10am Monday, 6 January 2025
Closing date for receipt of applications by the local authority	4pm Friday, 29 August 2025
Notification to applicants of offer or refusal of places	By 31 October 2025

Part-time Nursery class admissions - pupils born between 1 January 2023 and 31 March 2023, starting in a Part-Time Nursery class in April 2026:

Action	Date
Opening date for submission of applications	10am Monday, 6 January 2025
Closing date for receipt of applications by the local authority	4pm Friday, 29 August 2025
Notification to applicants of offer or refusal of places	By 31 October 2025

[Allocation of Full-time Nursery class places in English-medium schools](#)

The local authority will normally only admit up to the equivalent of the school's published admission number when allocating Full-time Nursery places.

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Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from place of ordinary residence to the nearest openly accessible school gate.

Allocation of Full-time Nursery class places in Welsh-medium schools

The local authority will normally only admit up to the equivalent of the school's published admission number when allocating Full-time Nursery places.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons
3. Children who will have a sibling at the school in any age group from the reception year to Year 6 in the school year 2025-2026.
4. Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

Allocation of Part-time Nursery class places in English-medium schools

In determining the number of Part-time Nursery places available for allocation in any school, the local authority will take into account the capacity of the accommodation used for nursery pupils, the published admission number and the number of Full-time Nursery pupils already on roll at the school.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children born between 1 September 2022 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026 or April 2026) who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children born between 1 September 2022 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026 or April 2026) for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children born between 1 September 2022 and 31 December 2022 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026) and whose place of ordinary residence is within the school's defined catchment area.

Where a school is over-subscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
4. Children born between 1 September 2022 and 31 December 2022 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026) who are not currently ordinarily resident within the school's defined catchment area but whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission application, that the child will be ordinarily resident within

the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

- 5. Children born between 1 September 2022 and December 2022 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026) whose place of ordinary residence is outside the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

- 6. Children born between 1 January 2023 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from April 2026) whose place of ordinary residence is within the school's defined catchment area.

Where a school is over-subscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

7. Children born between 1 January 2023 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from April 2026) who are not currently ordinarily resident within the school's defined catchment area but whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission application, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

8. Children born between 1 January 2023 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from April 2026) whose place of ordinary residence is outside the school's defined catchment area.

Where a school is over-subscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from the Reception year to Year 6 in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

Allocation of Part-time Nursery class places in Welsh-medium schools

In determining the number of Part-time Nursery places available for allocation in any school, the local authority will take into account the capacity of the accommodation used for nursery pupils, the published admission number and the number of Full-time Nursery pupils already on roll at the school.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

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1. Children born between 1 September 2022 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026 or April 2026) who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children born between 1 September 2022 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026 or April 2026) for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children born between 1 September 2022 and 31 December 2022 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026) who will have a sibling at the school in any age group from the reception year to Year 6 in the school year 2025-2026.
4. Children born between 1 September 2022 and 31 December 2022 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from January 2026) on the basis of proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
5. Children born between 1 January 2023 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from April 2026) who will have a sibling at the school in any age group from the reception year to Year 6 in the school year 2025-2026.
6. Children born between 1 January 2023 and 31 March 2023 who will attain the age of three in the school year 2025-2026 (these children will be eligible for a Part-time Nursery place from April 2026) on the basis of proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

13.3 Primary/infant school admission round (Reception year)

The relevant age group for the reception year is 4-5 years.

Every child is required by law to receive full-time education from the beginning of the school term after their fifth birthday. In the Bridgend County Borough, children are normally admitted to the Reception year in the September following their fourth birthday. However, parents/carers have the option of deferring their child's entry to the Reception

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year until later in the same school year. The deferment cannot continue beyond the beginning of the term after the child's fifth birthday, nor beyond the school year for which the original admission application was accepted by the local authority. Where the parent/carer wishes to defer the child's entry to the Reception year as detailed, the local authority will hold a place for the child.

An application for a Reception year place must be submitted. **There is no automatic admission to the Reception year at any primary or infant school, regardless of the school at which the child may be attending a nursery class.**

Timetable for Reception year admissions for September 2025

The expected timetable for children born between 1 September 2020 and 31 August 2021, entering a Reception class in September 2025 is as follows:

Action	Date
Opening date for submission of applications	10am Monday, 11 November 2024
Closing date for receipt of applications by the local authority	4pm Friday, 14 February 2025
Notification to applicants of offer or refusal of places (the 'offer date')	Wednesday, 16 April 2025
Closing date for parents/carers to submit an appeal	4pm Wednesday, 14 May 2025

Allocation of Reception year places for September 2025 in English-medium schools

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 1 to Year 6 in respect of primary schools, or Year 1 and Year 2 in respect of infant schools, attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

- 4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 1 to Year 6 in respect of primary schools, or Year 1 and Year 2 in respect of infant schools, attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

- 5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Year 1 to Year 6 in respect of primary schools, or Year 1 and Year 2 in respect of infant schools, attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

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The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children who will have a sibling at the school in any age group from Year 1 to Year 6 attending the school in the school year 2025-2026.
4. Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

13.4 Junior school admission round (Year 3)

In primary schools, the infant and junior sections are simply departments of the same school and children progress through the school from the infants to juniors without having to transfer elsewhere. Therefore, parents/carers are **not** required to complete a school admission application, since the children are already regarded as registered pupils in the primary school.

Children attending Year 2 in an infant school do not automatically transfer to Year 3 at junior school. An application for a Year 3 place at junior school must be submitted. **There is no automatic admission to a junior school or any primary school regardless of the infant school or primary school that a child currently attends.**

Children normally enter Year 3 in junior school at the beginning of the school year following their seventh birthday.

In Bridgend, there is one junior school, (that is, Llangewydd Junior School), which is an English-medium school.

If parents/carers do not wish their child to attend Year 3 at junior school and instead wish for their child to attend Year 3 at a standard primary school, an in-year admission/transfer application must be submitted. Parents/carers should note that places in Year 3 in a standard primary school may be very limited or unavailable. Also, that the local authority

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will not make admission decisions in respect of in-year admission/transfer applications for a September 2025 start date until Easter 2025.

Timetable for Year 3 junior school admissions for September 2025

The expected timetable for children born between 1 September 2017 and 31 August 2018, moving from infants school (Year 2) to junior school (Year 3) in September 2025 is as follows:

Action	Date
Opening date for submission of applications	10am Monday, 11 November 2024
Closing date for receipt of applications by the local authority	4pm Friday, 14 February 2025
Notification to applicants of offer or refusal of places (the 'offer date')	Wednesday, 16 April 2025
Closing date for parents/carers to submit an appeal	4pm Wednesday , 14 May 2025

Allocation of Year 3 junior school places for September 2025

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 4 to Year 6 attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 4 to Year 6 attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.
5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Year 4 to Year 6 attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

13.5 Secondary school admission round (Year 7)

Children normally enter Year 7 in secondary school at the beginning of the school year following their eleventh birthday.

An application for a Year 7 place must be submitted. **There is no automatic admission to any secondary school, regardless of the primary or junior school that a child currently attends.**

In Bridgend, there is one Welsh-medium secondary school (that is, Ysgol Gyfun Gymraeg Llangynwyd). There is one faith secondary school (that is, Archbishop McGrath Catholic

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High School), for which the local authority is **not** the admission authority. All other secondary schools are English-medium.

Timetable for Year 7 secondary school admissions for September 2025

The expected timetable for children born between 1 September 2013 and 31 August 2014, transferring from junior/primary school (Year 6) to secondary school (Year 7) in September 2025 is as follows:

Action	Date
Opening date for submission of applications	10am Monday, 14 October 2024
Closing date for receipt of applications by the local authority	4pm Friday, 17 January 2025
Notification to applicants of offer or refusal of places (the 'offer date')	Monday, 3 March 2025
Closing date for parents/carers to submit an appeal	4pm Monday, 31 March 2025

Allocation of Year 7 secondary school places for September 2025 for English-medium schools

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children whose place of ordinary residence is within the school's defined catchment area.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

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- a) Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

4. Children not currently ordinarily resident within the school's defined catchment area whose parents/carers have satisfied the local authority, by the published closing date for submission of the relevant school admission applications, that the child will be ordinarily resident within the defined catchment area by the start of the school term to which the application relates.

Where a school is oversubscribed under this criterion, the local authority will allocate the places in the following order of priority:

- a) Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

5. Children living outside the school's defined catchment area will be considered for any remaining places in the order of priority set out below:

- a) Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2025-2026.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

- b) Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

Allocation of Year 7 secondary school places for September 2025 for the Welsh-medium school

The local authority will admit children up to the school's published admission number and will only exceed the published admission number in exceptional circumstances.

Where the number of applications exceeds the number of places available, the local authority will apply the following **oversubscription criteria**, in order of priority, to allocate the places available:

1. Children who are looked after or previously looked after and children for whom the school is the named placement in the statement of SEN or local authority-maintained IDP.
2. Children for whom the local authority has received and accepted written evidence from a relevant professional/s that the placement is essential for medical, psychological, or compelling social reasons.
3. Children who will have a sibling at the school in any age group from Year 8 to Year 11 attending the school in the school year 2025-2026.
4. Proximity to school, as measured by the shortest available walking route from the place of ordinary residence to the nearest openly accessible school gate.

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other sibling/s.

14. Explanations of oversubscription criteria

14.1 Looked after and previously looked after children

The local authority is under a duty to prioritise looked after and previously looked after children in the oversubscription criteria.

In the case of a looked after child, the school admission application must be completed and submitted by the corporate parent (that is, the local authority with responsibility for the child) and supporting evidence must be provided (a Care Order or Interim Care Order).

In the case of previously looked after children, the school admission application must be accompanied by supporting evidence from the former corporate parent.

The relevant supporting evidence must be submitted with the application.

14.2 Children in receipt of a statement of special educational needs (SEN) or a local authority-maintained individual development plan (IDP)

To satisfy this criterion, the child must have a statement of SEN or a local authority-maintained IDP and the application is in respect of a mainstream place at the school named in the statement of SEN or local authority-maintained IDP.

14.3 Children for whom a placement is essential for medical, psychological, or compelling social reasons

To satisfy this criterion:

1. applicants **must** provide supporting written evidence from a relevant professional/s, such as, a registered health professional and/or a social worker, that states the reasons why the preferred school is the most suitable school and what difficulties would arise if the child had to attend another school. The evidence **must** be dated no more than three months prior to the application submission date; **and**
2. that written evidence is accepted by the local authority as sufficient to determine that placement at the preferred school is essential for the child.

Evidence that purely confirms a child's diagnosis or circumstances does not satisfy this criterion.

Applications in respect of young carers will be considered under this criterion subject to provision of the necessary evidence, as set out above.

The local authority expects **the applicant** to provide the required written evidence at the time the application is submitted. If this is not possible, the local authority must be advised of and satisfied as to the reasons and the required written evidence must then be provided prior to the closing time and date of the admission round. If the required written evidence is not provided to the local authority before the closing of the admission round, the application will not be considered for prioritisation under this criterion.

14.4 Child's address / place of ordinary residence

Applicants must record the current address at which the child is ordinarily resident on a school admission application.

When considering whether a child lives in a school's catchment area (English-medium schools) or the proximity to the school (Welsh-medium schools), it is the child's place of ordinary residence that the local authority considers to be the home address and satisfying the relevant admissions criteria.

Where the child's parents/carers are not living together but have shared responsibility for the child, and the child lives with each parent/carer for part of the periods during which the child receives education, the child will be considered as being ordinarily resident at the places where **each** of the parents/carers is ordinarily resident. Accordingly, the local authority will accept the address of either parent/carer as being the child's place of ordinary residence.

Changes to the child's address / place of ordinary residence

If the child's place of ordinary residence changes after the school admission application has been submitted:

1. The local authority **must** be notified immediately **in writing** (email or letter).
2. If the change is notified to the local authority **before** the closing time and date for the admission round, the change (that is, the new place of ordinary residence) will be used in the application of oversubscription criteria and the allocation of a place.
3. If the change is notified to the local authority **after** the closing time and date for the admission round, the place of ordinary residence recorded on the application (that is, the original place of ordinary residence) will be used in the application of oversubscription criteria and the allocation of a place. The applicant will have the option to complete and submit a late application if the allocated place is at a school that is no longer the preferred school, which would be subject to the provisions relevant to late applications (see section 13.1).
4. If the applicant does not inform the local authority of a change of ordinary residence prior to the date on which the child would start school, the local authority will take the action detailed below under 'provision of false or misleading information'.

Applications made on the basis of a **future** change in the place of ordinary residence

Where the applicant is in the process of a house move at the time that the application is submitted and is expressing a preference for a school that is the catchment school for the future address (English-medium schools) or the most proximate school for the future address (Welsh-medium schools), the applicant **must** record this on the application form and **must** provide the following evidence to the local authority:

- written evidence from a solicitor that contracts have been exchanged for the purchase of the property and a date for completion of the purchase has been agreed, such that the child will be moving to the new property and be resident at the address by the start of the school term to which the application relates; or
- a written tenancy agreement evidencing that the child will be resident at the new address by the start of the school term to which the application relates.

All required evidence **must** be received by the local authority **prior to the closing time and date for the admission round** and it is the responsibility of the applicant to provide the required evidence to the local authority by that deadline. If the required evidence is not received prior to the closing time and date, the application will be treated as an out of catchment application for the preferred school/s (English-medium schools), or the proximity to the preferred school (Welsh-medium schools) will be measured using the current (original) address.

If the evidence does not confirm that the child will be resident at the new address by the start of the school term to which the application relates, the application will be processed on the basis of the current (original) address.

Provision of false or misleading information regarding the place of ordinary residence

Every parent/carer who is applying for an admission round place will be expected to record information in the application form and/or supply documentation **with the application form** that evidences the child's place of ordinary residence.

The local authority will check the child's place of ordinary residence against the records held by the child's school (if applicable). In addition, Council Tax records for the parent/s or carer/s will be checked. If the parent/s or carer/s are not registered for Council Tax, documents supplied by the applicant will be checked. If the local authority is not satisfied by any evidence provided by the applicant and there is ongoing doubt about the child's place of ordinary residence, the local authority reserves the right to undertake further checks and/or seek further verification from the applicant. This will be to assist in the prevention and detection of address fraud for the purpose of gaining an unfair advantage in the school application system and under Schedule 2, part 1, 2(1) of the Data Protection Act 2018.

If the local authority concludes that a parent/carer has provided fraudulent or intentionally misleading information relating to the child's place of ordinary residence (this includes the failure to notify the local authority of changes to the place of ordinary residence) in order to obtain the advantage of a particular school placement to which the child would otherwise not be entitled, the local authority will act in accordance with paragraphs 3.40 and 3.41 of the School Admissions Code 2013.

If the local authority withdraws a school place, a new application will be required based on the accurate place of ordinary residence, and a right of appeal will be offered if a place at the preferred school/s is refused.

14.5 Siblings

A sibling is classified as a half or full brother/sister, a step-brother/sister, an adopted brother/sister, or a child living in the same household.

An application will be considered under the sibling criterion if the following conditions are met:

1. the full sibling details are recorded on the application; and
2. the sibling and the child who is the subject of the application **will** be attending **the same school at the same time** and the sibling is of statutory school-age.

This means:

- for Reception year applications, the sibling must be Year 1 to Year 6 in the school year for which the application is being made;

- for Year 3 junior school applications, the sibling must be in Year 4 to Year 6 in the school year for which the application is being made;
- for Year 7 secondary school applications, the sibling must be in Year 8 to Year 11 in the school year for which the application is being made;
- for Full-time Nursery and Part-time Nursery applications, the sibling must be Reception year to Year 6 in the school year for which the application is being made. As there is significant similarity in the timetables for the Reception, Full-time Nursery and Part-time Nursery admissions rounds, a parent/carer may not have been notified of the outcome of a Reception application for a child when completing a Full-time or Part-time Nursery application for another child. The parent/carer will be able to record the details of the child for whom a Reception application has been submitted but the sibling criterion will not be met if the local authority does not subsequently offer a Reception place at the relevant school to the sibling.

Provision of false or misleading sibling information

The local authority reserves the right to undertake checks on any sibling information provided. This will be to assist in the prevention and detection of fraud for the purpose of gaining an unfair advantage in the school application system and under Schedule 2, part 1, 2(1) of the Data Protection Act 2018.

If the local authority concludes that a parent/carer has provided fraudulent or intentionally misleading information relating to the sibling criterion in order to obtain the advantage of a particular school placement to which the child would otherwise not be entitled, the local authority will act in accordance with paragraphs 3.40 and 3.41 of the School Admissions Code 2013.

If the local authority withdraws a school place, a new application will be required based on the accurate information, and a right of appeal will be offered if a place at the preferred school/s is refused.

14.6 Multiple birth children

A multiple birth is defined as the birth of more than one baby from a single pregnancy (for example, the birth of twins, triplets etc).

When allocating places, if the last place is offered to a multiple birth child, the local authority will also admit the other multiple birth child/ren for whom an application was received at the same time and for the same school/s.

14.7 Proximity to school

The distance measurement will be from the child's place of ordinary residence to the nearest openly accessible school gate through which pupils may enter the school grounds.

Appendix A

It will be for the local authority to determine whether any entrance at any school does or does not constitute an openly accessible school gate.

In respect of residences that are within blocks of flats, the distance will be calculated from the front entrance of each flat.

The distances will be calculated to four decimal places.

The local authority uses software to measure all distances within the Bridgend County Borough that takes into account the assessed, available walking routes to the school/s. The local authority will not take into account any other walking routes to a school that a parent/carer may choose to use.

For applications where the child's place of ordinary residence is outside the Bridgend County Borough, the distance will be measured using publicly-available web-based services.

15. The offer process for admissions rounds

15.1 Offer dates

The School Admissions Code 2013 sets out how admission authorities in Wales must identify the offer date for primary school (reception), junior school (Year 3) and secondary school (Year 7) admissions rounds, reflecting The School Admissions (Common Offer Date) (Wales) Regulations 2013. The relevant offer dates for all admissions rounds for 2025-2026 are detailed in section 13.

15.2 Communication of the outcome

Parents/carers who submit an application by the published closing time and date of an admission round, or parents/carers whose late application has been accepted by the local authority for inclusion in the allocation of places for the offer date, will be notified in writing of the outcome of their application.

Parents/carers may not expect that the outcome of their application will be communicated verbally.

If the application is refused, the notification will set out the reasons for the decision and will advise parents/carers on the appeal process. As nursery education is non-statutory, **parents/carers have no right of appeal in respect of unsuccessful nursery class applications.**

15.3 Waiting lists

The local authority maintains waiting lists for oversubscribed schools. If a place at the preferred school is not offered, the child will be automatically included in the waiting list for

the school unless the parent/carers expressly advises the local authority that this action is not required.

For the **admissions rounds**, children will remain on the waiting list, for any school at which they have been refused a place, until 30 September 2025. Children will automatically be removed from the waiting list/s after this date.

If additional places become available at a school, they will be allocated to children on the waiting list on the basis of the published oversubscription criteria (see sections 13 and 14) and **not** the length of time a child has been on the waiting list.

16. In-year admissions / transfers

16.1 Circumstances in which an in-year admission/transfer application is required

An in-year admission/transfer application **must** be completed in any of the following circumstances:

1. If a child moves into Bridgend County Borough during the course of an school year and the parents/carers wish the child to attend a school for which the local authority is the admission authority.
2. If the parents/carers wish their child/ren to move to a different school within the Bridgend County Borough during the course of an school year and the parents/carers wish the child to move to a school for which the local authority is the admission authority.
3. If an application for an admission round has not been completed and submitted to the local authority by 31 August 2025 (that is, an application is being submitted on or after the official start date of the 2025-2026 school year).

16.2 School transfers

Parents/carers who wish to apply for a place at a different school for reasons other than a change of ordinary residence are advised to carefully consider the information in the Starting School Prospectus 2025-2026 and [information available on the local authority's website](#).

Parents/carers should talk to the headteacher of the pupil's current school about the reasons for a change of school being considered. There is a significant amount of research evidencing that changing schools is disruptive and can have a negative impact on a pupil's attainment. There are many reasons for this. It is particularly important that careful consideration is given to the impacts of moving pupils in Year 10 and Year 11, who would have already begun to study for their chosen GCSE subjects, as those GCSE subjects may not be available at a different school.

16.3 'Advance' requests

It is not fair and equitable for the local authority to hold places open for children for undue periods of time. Accordingly, the local authority will only process an 'advance' in-year school admission/transfer application (that is, for a future admission date), where the requested future admission date is **within two calendar months of the date the application is received** by the local authority, **and** the local authority is satisfied as to the reasons for the advance request.

16.4 Availability of places

Section 4 provides information regarding school capacities and published admission numbers, which the local authority uses to determine whether places are available.

As the number of pupils on roll in any school can change on a frequent basis, the local authority will not provide information on the availability of places in any year group at any school in advance of an in-year school admission/transfer application being submitted.

16.5 Consideration of applications

In-year school admission/transfer applications are considered by the local authority in order of date and time received. However, the local authority reserves the right to process any individual application in a different order where it considers this to be necessary and justified by the specific circumstances.

For in-year admissions/transfers, whether the child lives in or out of the catchment area of the requested school (English-medium schools) or the proximity to the nearest school (Welsh-medium schools), is of no relevance to the local authority's decision on whether a place at the requested school can be offered. (However, it is of relevance to the determination of whether there is eligibility or not for the provision of free home-to-school transport.)

If there is no place available in the relevant year group at the requested school, the local authority child will refuse admission to that school unless the circumstances are such that the local authority considers an exception should be made.

16.6 Communication of the outcome

Applicants will be notified in writing of the outcome of their in-year school admission/transfer application within 15 school days or 28 calendar days of the date of the application being received, whichever is the sooner.

Parents/carers may not expect that the outcome of their application will be communicated verbally.

If the application is refused, the notification will set out the reasons for the decision and will advise parents/carers on the appeal process. As nursery education is non-statutory,

parents/carers have no right of appeal in respect of unsuccessful nursery class applications.

16.7 Offer of a place at an alternative school

If a place at the preferred school is refused, the local authority will either offer a place at the nearest alternative school that has an available place in the relevant year, or explain why such an offer cannot be made (for example, where the nearest alternative school is the child's current school). The offer of a place at the nearest alternative school will be open for 21 calendar days from the date of the local authority's letter and will automatically expire if not accepted within that period.

If the offer of a place at the nearest alternative school is not accepted, or is expressly refused, the parent/carer must submit a new application if seeking a place at any other preferred school.

16.8 Waiting lists

The local authority maintains waiting lists for oversubscribed schools. If a place at the preferred school is not offered, the child will be automatically included in the waiting list for the school unless the parent/carer expressly advises the local authority that this action is not required.

For all in-year admission/transfer applications, children will remain on the waiting list for any school at which they have been refused for a period of three months from the date of the refusal letter, or until 31 August 2026, whichever is the sooner. Children will automatically be removed from the waiting list/s after this period or date.

Submission of a new in-year admission/transfer application for the same school does not renew a child's place on a waiting list. If a new in-year admission/transfer application is submitted and is refused, the child will be recorded as a new entry to the waiting list from the date of the refusal letter.

Registration of an admission appeal does not extend a child's time on the waiting list, irrespective of the date for the admission appeal hearing.

If additional places become available at a school, they will be allocated to children on the waiting list on the basis of the published oversubscription criteria (see sections 13 and 14) and **not** the length of time a child has been on the waiting list. A place cannot be allocated to a child who is not on the waiting list.

17. Admission appeals

17.1 General

School admission appeals are conducted in accordance with Welsh Government's School Admission Appeals Code 2013.

Any person who is considering an appeal is strongly recommended to read this School Admissions Policy 2025-2026, the School Admissions Code 2013 and the School Admission Appeals Code 2013 in full.

In the vast majority of cases, children are offered places in line with the expressed preference for a specific school. If, however, a child is unable to gain admission to the preferred school, parents/carers or Post-16 learners may choose to appeal to an independent appeal panel.

Parents/carers/ or Post-16 learners may accept a place offered at an alternative school while pursuing a place at the preferred school. The independent appeal panel will consider the grounds put forward by appellant/s and determine whether the merits of the case outweigh the case presented by the local authority.

As nursery education is non-statutory, parents/carers have **no right of appeal** in respect of decisions on nursery class admissions.

17.2 Registering an appeal

Persons who may register an appeal

In respect of appeal registrations for children of statutory school-age, the appeal must be registered by the parent/carer, as defined in section 13.

The local authority will only accept an appeal registration from a person who is not a parent/carer if it is accompanied by an appropriate written authorisation from a parent/carer.

The person registering the appeal will be required to make a declaration of the relationship to the child and provide such information as the local authority requires, including documentation, evidencing that relationship, at the time the appeal registration is submitted. The person registering the appeal will not be required to submit such if it has already been submitted in support of the admission application.

Appeals in respect of Post-16 admissions/transfers can be registered by either a parent/carer or the learner.

Timescale for registering an appeal

In the case of appeals relating to the refusal of places in an admissions round, the appeal **must** be registered with the local authority by the closing date as detailed in section 13.

In the case of appeals relating to the refusal of a place following submission of an in-year admission/transfer application, the appeal **must** be registered with the local authority within 21 calendar days of the date of the written notification of the refusal.

How to register an appeal

An appeal must be registered in writing.

The notification letter from the local authority regarding the outcome of an admission application will provide information on the appeal registration process.

17.3 Arrangements for the appeal hearing

The local authority will refer the appeal to an independent appeal panel. The clerk to the panel will arrange a time and place for the hearing.

Appellants will have the opportunity of attending the panel hearing and making their representations (oral and/or written).

Appellants are advised that:

1. They may elect not to attend the appeal meeting and, instead, allow the appeal to be considered on a written statement.
2. The appeal will be decided on the information available if parents/carers have indicated an intention to attend the appeal but do not do so, and fail to provide a reasonable explanation.
3. If appellants cannot attend on the scheduled date and it is not reasonably practicable to offer an adjourned hearing, the appeal will be decided on the information available.
4. Appellants will be given at least 14 calendar days written notice of the meeting of the appeal panel, unless they agree to a shorter period. The appellant should confirm this in writing to the clerk to the panel.

Appellants may be accompanied at a panel hearing by a friend or adviser or an interpreter. In accordance with the School Admission Appeals Code 2013, members of the Council, Members of the Senedd, local politicians and local authority officers are not permitted to attend. Appellants are requested to inform the clerk to the independent appeal panel of any representation at least seven days before the hearing.

17.4 Repeat appeals

Parents/carers and Post-16 learners do not have a right to a second appeal in respect of the same school and the same school year except where:

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- there were faults in the first appeal process and there is a significant possibility that the outcome might have been affected by the faults (this may be on the recommendation of the Public Services Ombudsman for Wales); or
- a fresh application is accepted because there has been a significant and material change in the circumstances of the parent/carer or child and that application has also been refused. Common examples of where a fresh application is considered are where a family has moved address or there are new medical reasons pertaining to the choice of school.

Parents/carers and Post-16 learners who appeal unsuccessfully may re-apply for a place at the same school in respect of a later school year (but subject to the timescales set out in section 13). Parents/carers and Post-16 learners will have a right to appeal if that application is refused.

Any information provided by an appellant associated with a school admission appeal registration will be held electronically and used by local authority for the purpose of the admission request.

18. The Bridgend Admission Forum

The local authority is under a statutory duty to establish an admission forum.

The Bridgend Admission Forum is constituted in accordance with Annex D of the statutory School Admissions Code 2013.

The role of the forum is to help ensure that the school admissions system in Bridgend is fair, straightforward and easy for parents/carers to understand. The forum is responsible for monitoring the local authority's compliance with the statutory School Admissions Code 2013 and may advise the local authority on ways in which admission arrangements could be improved.

The terms of reference, meeting minutes and annual reports of the [Bridgend Admission Forum](#) are published on the local authority's website.

19. Additional information

In addition to the sources of information already detailed, the local authority's Starting School Prospectus for 2025-2026 provides additional information on matters associated with school admissions and starting school.

20. Queries

Queries in relation to this policy and the admissions or appeal registration processes may be directed to Pupil Services as follows:

Appendix A

E-mail: pupilservices@bridgend.gov.uk

Tel No: 01656 642622

Address: Bridgend County Borough Council
Education and Family Support Directorate
Pupil Services
Civic Offices
Angel Street
Bridgend
CF31 4WB

[This policy](#) is published on the Bridgend County Borough Council website.

Appendix A - Admission numbers

Admission numbers for those schools for which the local authority is the admission authority.

The admission number for each school does not apply in respect of nursery classes.

Admission numbers remain under review and may be subject to change prior to the start of the 2025-2026 school year.

School	Admission Number
English-medium primary schools	
Abercerdin Primary School	30
Afon y Felin Primary School	19
Betws Primary School	30
Blaengarw Primary School	24
Brackla Primary School	45
Bryncethin Primary School	35
Brynmenyn Primary School	60
Bryntirion Infant School	40
Caerau Primary School	60
Cefn Cribwr Primary School	20
Cefn Glas Infant School	66
Coety Primary School	60
Corneli Primary School	46
Coychurch (Llangrallo) Primary School	19
Croesty Primary School	30
Cwmfelin Primary School	30
Ffaldau Primary School	30
Garth Primary School	30
Litchard Primary School	60
Llangewydd Junior School	90
Llangynwyd Primary School	14
Maes yr Haul Primary School	75
Mynydd Cynffig Primary School	60
Nantffyllon Primary School	40
Nantymoel Primary School	30
Newton Primary School	34

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Nottage Primary School	60
Ogmore Vale Primary School	53
Oldcastle Primary School	60
Pencoed Primary School	72
Penybont Primary School	45
Pîl Primary School	30
Plasnewydd Primary School	45
Porthcawl Primary School	28
Tondu Primary School	42
Trelales Primary School	30
Tremains Primary School	65
Tynyrheol Primary School	10
West Park Primary School	55
English-medium voluntary controlled schools	
Pen y Fai Church in Wales Primary School	30
Welsh-medium primary schools	
Ysgol Gymraeg Bro Ogwr	54
Ysgol Gynradd Gymraeg Calon y Cymoedd	30
Ysgol Cynwyd Sant	45
Ysgol y Ferch o'r Sgêr	33
English-medium secondary schools	
Brynteg School	333
Bryntirion Comprehensive School	210
Coleg Cymunedol Y Dderwen	276
Cynffig Comprehensive School	180
Maesteg School	228
Pencoed Comprehensive School	214
Porthcawl Comprehensive School	246
Welsh-medium secondary schools	
Ysgol Gyfun Gymraeg Llangynwyd	165

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Proposed School Admissions Policy 2025-2026 - Welsh Language Impact Assessment

Stage 1 – Information Gathering	
NOTE: As you complete this tool you will be asked for evidence to support your views . Please see Welsh Language Impact Assessment Guidance for more information on data sources.	
Proposal Name:	School Admissions Policy 2025-2026
Department	Education and Family Support
Service Director	Mr Lindsay Harvey – Corporate Director
Officer Completing the WLIA	Emma Giles – Senior Pupil Services Officer
Email	Emma.Giles@bridgend.gov.uk
Phone	01656 643449
Brief Description	The proposed school admission arrangements for the 2025-2026 school year for those schools in Bridgend for which the local authority is the admission authority (that is, all community schools maintained by the local authority with the exception of the voluntary-aided schools).
Date	01/11/2023
Please outline who this proposal affects? (Service Users, Employees, Wider Community)	Learners and their families/carers. Schools. The wider community.

What are the aims of the policy, and how do these relate to the Welsh Language?	<p>The admission of learners to those schools, for which the local authority is the admission authority, in accordance with all relevant legislation and in a manner that is fair and timely.</p> <p>The local authority is the admission authority for all Welsh-medium schools in Bridgend.</p>
Who will benefit / Could the policy affect Welsh language groups? If so, list them here.	<p>All learners for whom education is sought at a school for which the local authority is the admission authority. Therefore, this includes all learners for whom education through the medium of Welsh is preferred.</p> <p>Schools for which the local authority is the admission authority.</p> <p>The wider community.</p>
Current linguistic profile of the geographical area(s) concerned	<p>The ONS recently published the data for the national Census 2021 (Census date 21 March 2021). The 10-year Census provides the most complete information about the Welsh language skills of the population.</p>

	<p>The Census data identifies the following:</p> <table><tr><th colspan="3">Welsh Language Skills of the population (%)</th></tr><tr><th></th><th>Bridgend County Borough</th><th>Wales</th></tr><tr><td>Can speak Welsh</td><td>9%</td><td>17.3%</td></tr><tr><td>Can understand spoken Welsh</td><td>12.4%</td><td>21.3%</td></tr><tr><td>Can read Welsh</td><td>10%</td><td>16.8%</td></tr><tr><td>Can write Welsh</td><td>7.8%</td><td>14.8%</td></tr></table> <p>With regards to combinations of Welsh language skills (for example, can speak Welsh but cannot read or write Welsh), 15.2% of the population of Bridgend identified as having some combination of skills, compared to 24.4% for the whole of Wales.</p> <p>The data shows that there is a gap in the Welsh language skills of the population of Bridgend when compared to the whole of Wales.</p>	Welsh Language Skills of the population (%)				Bridgend County Borough	Wales	Can speak Welsh	9%	17.3%	Can understand spoken Welsh	12.4%	21.3%	Can read Welsh	10%	16.8%	Can write Welsh	7.8%	14.8%
Welsh Language Skills of the population (%)																			
	Bridgend County Borough	Wales																	
Can speak Welsh	9%	17.3%																	
Can understand spoken Welsh	12.4%	21.3%																	
Can read Welsh	10%	16.8%																	
Can write Welsh	7.8%	14.8%																	
Other relevant data or research	None.																		

Stage 2 – Impact Assessment

In this section you need to consider the impact, the evidence and any action you are taking for improvement. This is to ensure that the opportunities for people who choose to live their lives and access services through the medium of Welsh are not inferior to what is afforded to those choosing to do so in English, in accordance with the requirement of the Welsh Language (Wales) Measure 2011.

Please note there is a separate impact assessment for Equality and Socio-Economic duty that must also be completed for policy proposals. Remember that effects that are positive for some groups could be detrimental to others - even among Welsh language groups. Consider the effects on different groups. For example, a proposal may be beneficial to Welsh learners, but not to Welsh speakers.

Will the proposed action affect any or all of the following?

	Does the proposal have any positive, negative or neutral impacts?	Describe why it will have a positive/negative or neutral impact on the Welsh language.	What evidence do you have to support this view?	What action(s) can you take to mitigate any negative impacts or better contribute to positive impacts?
Opportunities for persons to use the Welsh language eg staff, residents and visitors The rights of Welsh speakers and learners to use Welsh when dealing with the council and for staff to use Welsh at Work	Neutral	Every year, the proposed policy is published in Welsh. For the required consultation process there is opportunity for any responses to the consultation to be received and considered in Welsh. There is no change to this process for the proposed policy for 2025-2026.	Proposed policy document and communications with consultees. Feedback received on the proposed policy for 2020-2021 was received in Welsh.	None.

Stage 2 – Impact Assessment**Will the proposed action affect any or all of the following?**

	Does the proposal have any positive, negative or neutral impacts?	Describe why it will have a positive/negative or neutral impact on the Welsh language.	What evidence do you have to support this view?	What action(s) can you take to mitigate any negative impacts or better contribute to positive impacts?
Numbers and / or percentages of Welsh speakers eg Welsh Medium Education / Study Opportunities. Links with the Welsh Government's Cymraeg 2050 Strategy / BCBC Five Year Welsh	Positive	School admissions in Wales are governed by specific legislation and a statutory code, which aim to ensure that admissions to school are fair and timely. As is the case every year, the proposed policy for 2025-2026 covers the arrangements for admission of learners to those schools in Bridgend, for which the local authority is the admission authority - this includes all Welsh-medium schools in Bridgend. The arrangements described in the proposed policy accord with the legislative requirements. The	Annual capacity calculations for Ysgol Gymraeg Bro Ogwr. An ongoing demand for part-time Nursery places at Ysgol Gymraeg Bro Ogwr, may be unmet in future years if the capacity is not increased. In respect of the part-time Nursery admission rounds - for January and April 2021, 100% of the applications made in respect of Ysgol Gymraeg Bro Ogwr had to be refused. 73.3% of the applications for January and April 2022 and 33.3% of the applications for	None.

		<p>arrangements support and enable parents/carers to express their school preferences, whether those be for English-medium or Welsh - medium schools.</p> <p>Published admission numbers (PAN) for each school form an intrinsic and important part of school admission arrangements. If the PAN for any particular year group increases, this means that there is the opportunity to increase the number of pupils into that year group and school. For this admission year (2025-2026) the local authority is not proposing to increase the PAN at any school.</p> <p>For this admission year (2025-2026) the local authority is proposing a double mobile classroom at Ysgol Gymraeg Bro Ogwr to provide an</p>	<p>January and April 2023 were also refused. Due to the requirement to convert any unfilled full-time Nursery places to accommodate the part-time Nursery applications, the impact on the full-time Nursery provision for the last four years is that there were no places available for an in-year admissions/transfers. The proposed increase in capacity by the provision of a double mobile classroom will alleviate this pressure and offer more Welsh-medium places.</p>	
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		<p>additional 60 Welsh-medium places, as an interim solution until the new Band B school is complete. This will help to meet the immediate demand for Welsh-medium pupil places in the area and increase the uptake of Welsh-medium places. It also contributes to meeting Welsh Government aim of one million Welsh speakers by 2050.</p> <p>This provision will be used to provided additional capacity for part-time Nursery provision at the school due to the demands for places at the school. Ysgol Gymraeg Bro Ogwr only has capacity for two part-time nursery places and on an annual basis the local authority is required to convert any residual full-time nursery places, where available, to part-time places in order to meet demand. The</p>		
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		proposed double mobile classroom would allow for an increased part-time nursery provision without impacting the full-time nursery provision.		
Opportunities to promote the Welsh language eg status, use of Welsh language services, use of Welsh in everyday life in work and in the community Actively encourage and promote the use of our services in Welsh to see an increase in demand over time.	Neutral	Statements above are applicable.	Statements above are applicable.	None.
Compliance with the Council's Statutory Welsh Language Standards eg increasing or reducing the Council's ability to	Neutral	The School Admissions Policy is made available in Welsh every year, both at the consultation stage and the determination stage. There is, and will be, no difference for the	Policy documents. Admission application forms. The local authority's website and 'My Account' where parents/carers can	None.

deliver services through the Medium of Welsh. Consider the rights of Welsh speakers to use Welsh when dealing with the Council and for staff to use Welsh at Work		proposed policy for 2025-2026. School admission application forms are made available in Welsh every year, and this will be no different for 2025-2026.	apply for a school place online, are bilingual.	
Treating the Welsh language, no less favourably than the English language	Neutral	<p>As in every year, the arrangements set out in the proposed policy for 2025-2026 continue to reflect and support the fundamental right of parents/carers to express their preferences for schools, in accordance with admissions legislation in Wales.</p> <p>The proposed policy for 2025-2026 continues to set out the actions that the local authority will take if places at any school are oversubscribed. There are no changes to the dedicated oversubscription criteria applicable to Welsh-medium schools. These</p>	<p>For the Reception admission rounds, the percentage of the total applications received for which the expressed first preference school was a Welsh-medium school increased each from September 2019, and has remained consistent for September 2023 as follows:</p> <p>September 2019 – 9.0% September 2020 – 9.1% September 2021 – 9.2% September 2022 – 9.3% September 2023 – 9.3%</p>	The local authority is currently working with the Welsh Education Forum (WEF) and through the work of developing the Welsh in Education Strategic Plan (WESP), to identify the benefits in the development of Welsh-medium school catchment areas.

		criteria are no less favourable than those for oversubscribed English-medium schools. The policy reflects that there are no catchment areas for Welsh-medium schools in Bridgend. However, this does not present a disadvantage for any parent/carer applying for a Welsh-medium school, as proximity to the school is used as the alternative oversubscription criteria.		
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Stage 3 - Strengthening the proposal

Having listed actions in section 2 which may mitigate any negative impacts or better contribute to positive impacts – please record below which ones you will imbed into the policy proposal and who will be responsible for them.

Also consider is the proposal necessary? Would it be possible to meet demand without any new developments? Could other existing provision be used? Where should the development be?

What are you going to do?	When are you going to do it?	Who is responsible?
The local authority will continue to promote Welsh-medium education via the WEF and through the delivery of the approved WESP	Timescales agreed in the WESP.	The local authority and partners.
Continue to offer discretionary free home-to-school transport for pupils residing over the statutory distance of <ul style="list-style-type: none"> • two miles for primary school pupils • three miles for secondary school pupils and • over 1.5 miles for nursery pupils to their nearest Welsh-medium school, even if that school is not the nearest school to their home.	Ongoing.	The local authority.
Progress a strong School Modernisation Programme with a significant increase in the number and availability of Welsh-medium nursery and primary school places across Bridgend.	In line with the delivery of the Band B 21 st century Schools Modernisation Programme outlined in the approved WESP.	
If ways of reducing the impact have been identified but are not possible to implement, please explain why. Give sufficient detail of data or research that has led to your reasoning.		
What was identified?	Why is it not possible?	
Not applicable	Not applicable	

Stage 4 – Review

For all policy proposals, whether it is a Significant Key Decision or not, you are required to forward this assessment to Welsh Language services – WLS@bridgend.gov.uk and the Consultation and Engagement team – consultation@bridgend.gov.uk in the first instance for some initial guidance and feedback.

It is important to keep a record of this process so that we can demonstrate how we have considered and built-in sustainable Welsh language considerations wherever possible. Please ensure you update the relevant sections below in collaboration with the relevant departments.

Welsh Language Services Comments	Date Considered	Brief description of any amendments made following Welsh Language Services feedback
Consultation Comments	Date Considered	Brief description of any amendments made following consultation

Stage 5 – Monitoring, Evaluating and Reviewing

How and who will you monitor the impact and effectiveness of the proposal?

Ongoing data analysis and reporting in respect of school admissions. An annual report is required by legislation and all admission policies are sent to Welsh Government by 15 April in the determination year.

Stage 6 – Summary of Impacts for the Proposal

Provide below a summary of the impact assessment, to include some of the main positive and negative impacts along with an overview of actions taken since the impact assessment to better contribute to more positive impacts.

Opportunities for persons to use the Welsh language – neutral impact.
 Numbers and / or percentages of Welsh speakers – neutral impact.
 Opportunities to promote the Welsh language – neutral impact.
 The Council's compliance with the statutory Welsh Language Standards – neutral impact.
 Treating the Welsh language, no less favourably than the English language – neutral impact.

No additional actions have been taken to better contribute to more positive impacts since the consultation on the proposed arrangements (which was undertaken in accordance with the Education (Determination of Admission Arrangements) (Wales) Regulations 2006 and the statutory School Admissions Code 2013).

Stage 7 – Sign off			
Name of Officer completing WLIA	Emma Giles	Service Director name:	Lindsay Harvey
Position	Senior Pupil Services Officer	I recommend that the proposal: (Highlight decision)	Is implemented with no amendments
			Is implemented taking into account the mitigating actions outlined
			Is rejected due to disproportionate negative impacts on the Welsh language
Signature	<i>ES Giles</i>	Service Director Signature	
Date	08 November 2023	Date	

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	HOME-TO-SCHOOL/COLLEGE TRANSPORT POLICY
Report Owner / Corporate Director:	CORPORATE DIRECTOR OF EDUCATION AND FAMILY SUPPORT
Responsible Officer:	ROBIN DAVIES GROUP MANAGER BUSINESS SUPPORT
Policy Framework and Procedure Rules:	There is no effect upon the policy framework or procedure rules.
Executive Summary:	This report seeks Cabinet approval to progress a full public consultation on proposals to amend the local authority's Home-to-School/College Transport Policy to support the identified medium-term financial strategy efficiency savings of £792k in the 2025-2026 financial year.

1. Purpose of Report

- 1.1 The purpose of this report is to seek Cabinet approval to begin a public consultation on proposed changes to the local authority's Home-to-School/College Transport Policy.

2. Background

- 2.1 The local authority has a statutory duty under the Learner Travel (Wales) Measure 2008 ('the Measure') to make suitable transport arrangements to facilitate the attendance of children each day at the relevant places where they receive their education or training subject to specific requirements This is primarily achieved via the contracting of home-to-school transport services from the private sector. Eligibility for pupils and Post-16 learners to be in receipt of free home-to-school/college transport is governed by the local authority's Home-to-School/College Transport Policy.

- 2.2 Under the Measure, local authorities must:

- assess the travel needs of learners in their authority area;
- provide free home-to-school transport for learners of compulsory school age attending primary school who live two miles or further from their nearest suitable school;
- provide free home-to-school transport for learners of compulsory school age attending secondary school who live three miles or further from their nearest suitable school;
- assess and meet the needs of 'looked after' children in their authority area;
- promote access to Welsh-medium education;

- promote sustainable modes of travel; and
- where learners are not entitled to free transport, local authorities have the power to provide transport on a discretionary basis.

- 2.3 In September 2015, Cabinet determined changes to the local authority's Home-to-School/College Transport Policy to meet the Medium-Term Financial Strategy (MTFS) efficiency savings identified from 2016-2017 to 2019-2020. The policy change was implemented in September 2016.
- 2.4 Changes to policy eligibility were based on statutory distances laid down in the measure of two miles for primary school pupils and three miles for secondary school pupils.
- 2.5 Cabinet was not minded to remove the discretionary arrangements for Post-16 learners, who would continue to benefit from home-to-school/college transport at the three-mile distance (the same as secondary school pupils in statutory education).
- 2.6 However, the policy included 'in-receipt' and the 'sibling rule' entitlement (explained below), which has meant that, year-on-year, the number of pupils the policy change has applied to (and consequently, any efficiency savings), has been relatively small.

In-receipt entitlement

- 2.7 This applies where pupils befitting from eligibility for free home-to-school transport under the former policy eligibility, prior to the policy change in September 2015, would retain their more favourable eligibility under the former policy arrangements until they left the current phase of education (primary or secondary) or moved to another school.

Sibling rule entitlement

- 2.8 The 'in receipt' eligibility under the pre-2015 policy, as described above, has been able to be passed-on by one sibling to another where the younger sibling started at the same school as their older sibling. This rule has benefitted families with larger numbers of siblings attending the same school.
- 2.9 The 'in-receipt' entitlement has since all but receded naturally, as pupils have aged and either transitioned from primary to secondary education or have left school naturally at the end of either Year 11 or Year 13. However, the 'sibling rule' entitlement persists, where many pupils have a more generous offer for school transport based on the eligibility passed down to them by their older siblings (who were attending the same school) under the former more generous (pre-2016) policy arrangements.
- 2.10 This has caused some discontent among some families, in particular those with just one child, and there have been several complaints to the local authority over many years regarding the inequity associated with this policy arrangement. Many older pupils currently benefit from a more generous school transport offer than pupils several years younger than them, who are not eligible for free home-to-school transport under the current policy.

- 2.11 In Bridgend, the term 'nearest suitable school' applies to the local catchment area school and this can be an English-medium, voluntary aided (VA), voluntary-controlled or maintained special schools. For Welsh-medium schools, there are no catchment areas and eligibility for free home-to-school transport is predicated on the school being the closest to the pupil's home.
- 2.12 Section 2 of the Measure requires local authorities to assess the travel needs of all learners under the age of 19 who receive education or training and who are ordinarily resident in the local authority's area. This includes those who have reached the age of 19 but started a course when under the age of 19 and continue to attend that course. However, there is no statutory duty in the Measure to provide free transport for those who are not of statutory school age, and this includes nursery aged children as well as Post-16 learners.
- 2.13 The Learner Travel Statutory Provision and Operational Guidance was published in June 2014. This guidance includes statutory provisions, which local authorities must consider in undertaking their responsibilities under the Measure. This guidance includes statutory guidance on risk assessing walked routes to school.
- 2.14 The Measure and Statutory Provision and Operational Guidance also provide guidance on circumstances in which local authorities may choose to make their own discretionary arrangements as well as how these may be removed.
- 2.15 The local authority's Home-to-School/College Transport Policy is closely aligned with the local authority's School Admissions Policy, although it does not form part of the admission arrangements. Nevertheless, the local authority's Home-to-School/College Transport Policy will be a material consideration in respect of the choice of school for many parents/carers and is therefore detailed in the local authority's Admissions Policy and the accompanying 'Starting School' booklet for parents.

3. Current situation/proposal

- 3.1 The final MTFS 2024-25 to 2027-28, presented to Council on 28 February 2024, includes a saving of £792k for 2025-26 in respect of the current Home-to-School/College Transport Policy.
- 3.2 Although there have been significant savings following the policy change approved by Cabinet in September 2015, changes in demographics and demand, especially post-pandemic, have meant that additional budget growth has been necessary to support the learner transport budget.
- 3.3 Cabinet previously approved a full 12-week public consultation on proposed amendments to the local authority's Home-to-School/College Transport Policy in September 2014. The outcome of this consultation was reported in September 2015. More recently, in July 2019 Cabinet was minded to approve a 12-week public consultation on the following proposals:
- removal of escorts from all taxis and minibuses (excluding those transporting pupils with special education need) of less than 8 passengers;
 - withdrawal of transport for all learners benefitting from identified and available (safe) routes to school in line with statutory distances of 2 miles for primary school-age pupils and 3 miles for secondary school-age pupils;

- removal of 'sibling' and 'in receipt' protection for pupils;
- removal from the local authority's Home-to-School/College Transport Policy of specific examples of the special circumstances where the local authority will provide discretionary transport;
- removal of all transport for nursery pupils; and
- removal of all Post-16 transport.

3.4 However, in September 2020, following the reporting of the outcome of that 12-week consultation, Cabinet determined that the recommendations regarding statutory distances to schools, *'be deferred and that details of the August 2020 Welsh Government announcement regarding its review of the statutory limits for learner travel be awaited, in order that the local authority can consider in the round how we align Bridgend County Borough Council guidelines with Welsh Government funding proposals and statutory limits.'*

3.5 However, the review by Welsh-Government has not been forthcoming and it is now proposed that the local authority progress proposals to address the aforementioned MTFS savings independently of any awaited national policy agenda change.

3.6 It is therefore proposed that a new full 12-week consultation for further amendments to the local authority's Home-to-School/College Transport Policy be considered to commence in March 2024. Such a consultation should take into consideration the following legislative context.

Statutory responsibility to consult

3.7 Section 6 of the Learner Travel (Wales) Measure 2008 gives local authorities the power to make any arrangement they think fit to facilitate the travel of learners to and from a place where they receive education or training. The power applies in relation to a learner living or studying in the authority's area.

3.8 If a local authority chooses to make use of the section 6 power to provide discretionary transport arrangements, the local authority also has the power to remove this provision at a later date. In doing this, the authority should follow the correct procedures for withdrawal of transport provision in line with relevant policies and protocols.

Conformity with national and local guidance

3.9 It is important that pupils are actively engaged with, on policy proposals, so that they are fully able to exercise their Article 12 right as outlined in The United Nations Convention on the Rights of the Child (UNCRC).

3.10 Article 12 identifies that children have the right to say what they think should happen and have their opinions considered. The convention encourages adults to listen to the opinions of children and involve them in decision-making process.

3.11 However, the convention recognises that the level of a child's participation in decisions must be appropriate to the child's level of maturity. A child's ability to form and express their opinions develops with age and therefore it is considered important that support from schools is important, to articulate the proposals to pupils in a way that they would understand.

Conformity with Bridgend County Borough Council's consultation and engagement guidelines

- 3.12 The local authority's own consultation and engagement toolkit which was adopted in August 2014 provided a framework from which we developed our approach to consultation. An opportunity to respond to the survey and engage with the Council on how the public could share their views, is only delivered within the reasonable usage of the resources available. It is proposed that several community engagement events will need to be arranged to support the consultation. These will be attended by senior managers, giving the opportunity for all interested parties the opportunity to engage.
- 3.13 All documentation will need to be written in clear English, with Welsh language versions available together with other alternatives available on request including large print and braille. A letter outlining the consultation and inviting views on the proposals will be sent to every parent of every child attending all schools in Bridgend, and to those learners in Bridgend and other colleges. An electronic survey will be made available at libraries, and the survey will also receive promotional support via the use of local newspapers and social media (in particular, on Facebook and X (formerly Twitter)).

Conformity with the National Principles for Public Engagement in Wales

- 3.14 There will be opportunity for the public to engage with officers at the planned public engagement sessions. Pupils will be encouraged to respond to the consultation with support from schools and specialist local authority officers, explaining how important their contribution will be to the consultation exercise, and that they could influence any decision in respect of the policy.
- 3.15 There will be engagement with a number of organisations including all Bridgend schools, including school councils, Bridgend College, councillors, regional MSs, local MPs, the First Minister, town and community councils, neighbouring councils, Estyn, school governing bodies, headteachers and all Public Service Board members, including South Wales Police. Furthermore, there will be engagement with Rhieni dros Addysg Gymraeg (RhAG), the Archdiocese of Cardiff, the Diocese of Llandaff, the Church in Wales, and Roman Catholic Church.
- 3.16 The consultation will be jargon free, appropriate, and understandable across a wide range of audiences. Information will be made available in a variety of formats and bilingually. Irrelevant information will not be presented, merely that pertinent to the proposals.
- 3.17 There will be a full range of opportunities to engage, in particular the public engagement events.
- 3.18 Based on previous experience of progressing similar consultation exercises on proposed changes to the Home-to-School/College Transport Policy, it is proposed that three engagement sessions are held in a suitable school in the north and south of the county borough and at Bridgend College.

- 3.19 It is not proposed that prescriptive public meetings be held as these are often unhelpful as they do not allow for parity of engagement. The open format of the proposed engagement events is planned to help participating members of the public to understand our proposals. This proposal is based on experience, given that many attendees at public meetings do not always have an opportunity to engage fully or feel able to ask questions.
- 3.20 These engagement events will focus on obtaining the views of the public on specific issues, and also in improving the general understanding of our proposals and their possible impact for individuals and communities.

Conformity with the National Children and Young People's Participation Standards for Wales

- 3.21 There are seven national standards that organisations working with children and young people should aim to meet so that children and young people have a good experience of participation. These standards promote the participation of children and young people in making decisions, planning, and reviewing any action that will affect them.
- 3.22 The seven standards and how we meet the requirements of each one in respect of consultation approach are as follows:

Information - which is easy for children and young people to understand

We will ask children and young people to take part in the consultation and we will make the information presented easy for them to understand. We will send out information in a variety of forms as identified earlier. We will talk to children and young people from school councils and the Bridgend Youth Forum.

It's your choice - enough information and time to make an informed choice

We will ensure that through the consultation children and young people know what they are being asked to engage in.

No discrimination - every child and young person has the same chance to participate

We will ensure that all young people from all backgrounds will be able to access relevant information and that it will be appropriately presented. We will treat children and young people with equal status as adults, especially in this particular scenario as the policy proposal impacts upon them as individuals.

Respect - Your opinion will be taken seriously

We will request children and young people's views on what is proposed. We will record what children and young people say and we will ensure that there are a variety of channels of communication and opportunities available, so that children and young people can provide their views on the proposals.

You get something out of it - You will enjoy the experience

In our consultation meetings we will welcome, value, and respect the attendance and engagement by children and young people and respond to each question and query independently.

Feedback - You will find out what difference your opinion has made

The consultation report will be published following the consultation.

Improving how we work - Adults will ask you how they can improve how they work

We will incorporate lessons learned from our engagement with young people to ensure there are opportunities for the voices of our young people continue to be heard in respect of future proposals.

Conformity with Bridgend County Children and Young Person's Charter

- 3.23 The Charter is based on the United Nations Convention on the Rights of the Child (UNCRC) to promote and safeguard the rights and interests of all children and young people within Bridgend County. A full Equalities Impact Assessment (EIA) will accompany the consultation report that will be provided to Cabinet following the proposed consultation exercise. This will contain a summary of all 42 articles in the UNCRC although some are more relevant than others. There is no expectation in respect of the Charter that the entire convention and its relevance to the policy under review are fully understood.
- 3.24 The Council, through consideration of this charter, works to the principle of 'Best interest'. However, this does not mean that any negative decision would automatically be overridden, although it does require the local authority to examine how a decision has been justified and how the local authority would mitigate against the impact (in the same way as any other protected group).

Conformity with Paragraph 12 of the Children and Families (Wales) Measure 2010

- 3.25 Paragraph 12 of the Children and Families (Wales) Measure 2010 states that a local authority must make such arrangements as it considers suitable to promote and facilitate participation by children in decisions of the authority which might affect them.
- 3.26 There will be a number of opportunities, in particular through community engagement, to ensure participation by pupils.

Considering the effects of the policy proposal on the Welsh language

- 3.27 The Welsh Language (Wales) Measure 2011 makes provision about promoting and facilitating the use of the Welsh language and treating the Welsh language no less favourably than the English language.
- 3.28 The Welsh Language Measure also makes provision about standards relating to the Welsh language.
- 3.29 The Measure provides that the local authority, in its proposals to change a policy, considers one or more of the following:

- what effects, if any, (whether positive or adverse) the policy decision would have on opportunities for other persons to use the Welsh language, or treating the Welsh language no less favourably than the English language;
- how the decision could be made so that the decision has positive effects, or increased positive effects, on opportunities for other persons to use the Welsh language, or treating the Welsh language no less favourably than the English language; and
- how the decision could be made so that the decision does not have adverse effects, or has decreased adverse effects, on opportunities for other persons to use the Welsh language or treating the Welsh language no less favourably than the English language.

- 3.30 The local authority will consider and identify all the possible effects the policy proposal may have on opportunities for persons to use the Welsh language or treating the Welsh language no less favourably than the English language.
- 3.31 Therefore, the local authority will consider relevant evidence, in order to understand the likely or actual effect of the policy decision on the Welsh language.
- 3.32 The local authority's statutory duty to promote the Welsh language is enshrined in the above-mentioned Welsh Language (Wales) Measure 2011.
- 3.33 It is considered that if free home-to-school transport is removed for nursery and Post-16 learners, given the limited geographical choice of Welsh-medium schools in the county borough that is, one secondary and four dispersed primary schools, a parent/carer considering placing their child into Welsh-medium education may choose not to proceed on the basis of the loss of free transport.
- 3.34 Many parents/carers will have high aspirations for the ongoing education of their child beyond their statutory education. A clear barrier to that continuity of education is considered to be the availability of free transport at Post-16. The outcome of previous public consultations on this matter clearly identified concerns associated with the availability of transport, with parents/carers and pupils stating they would potentially not progress into sixth form in particular if free transport was removed.
- 3.35 Part of the local authority's duty is to ensure that the provision of learner transport complies with section 10 of the Learner Travel (Wales) Measure (2008), that is, "to promote access to education and training through the medium of Welsh". This is further strengthened through Welsh Government's strategy for Welsh-medium education.
- 3.36 The vision of the Welsh-Medium Education Strategy is "To have an education and training system that responds in a planned way to the growing demand for Welsh-medium education, reaches out to and reflects our diverse communities and enables an increase in the number of people of all ages and backgrounds who are fluent in Welsh and able to use the language with their families, in their communities and in the workplace".
- 3.37 This vision is supported by six strategic aims. Strategic aim 1: "To improve the planning of Welsh-medium provision in the pre-statutory and statutory phases of education, on the basis of proactive response to informed parental demand" is supported by 11 objectives one of which is "To promote access to Welsh-medium

statutory primary and secondary school provision, and to institutions providing further education and nursery education, when exercising functions under the Learner Travel (Wales) Measure 2008”.

- 3.38 The strategic aims and key outcomes set out in the local authority’s Welsh Education Strategic Plan (WESP) is that our provision of Welsh-medium education and support for the teaching of the Welsh language is strong. The WESP is also explicit that the local authority fully complies with the requirements of the Learner Travel (Wales) Measure (2008) and that currently it exercises discretion with regards to distance criteria.
- 3.39 The authority is also bound by the Welsh Language Standard 2015. Schedule 2 of this relates to policy making standards and the duty on public bodies to ensure that when consulting on and formulating new (or revising existing policy decisions) policies that the effects (whether adverse/positive) on opportunities for persons to use the Welsh language are considered, and that the authority is treating the Welsh language no less favourably than the English language.
- 3.40 This is an important consideration in respect of access to any Welsh-medium school. Consequently, the local authority recognises in progressing these proposals the need to support and promote the growth of the Welsh language and therefore the proposals do not include any policy change on the provision of home-to-school transport for pupils attending their nearest suitable Welsh-medium school within Bridgend.

Faith-based education

- 3.41 Unlike the Welsh language, there is no statutory requirement to promote a faith-based education. However, it is important to note that an identical number of schools are available to learners wishing to progress a faith-based education, as there are Welsh-medium schools. This limited number of schools is considered as a barrier to those choosing a faith-based education for their child and as such the protection of both nursery and Post-16 education is considered to be important in ensuring the decision about a child entering faith-based education, is not prejudiced with the knowledge that Post-16 transport would not be available in the future.
- 3.42 The support for constructive diversity in education is at the heart of national and local policy. The duality of a faith and non-faith, offers learners the opportunity to be educated in accordance with the wishes of them and their parents/carers. This accords with the duty under Article 2 of Protocol 1 of the European Convention on Human Rights (ECHR): ‘to respect the right of parents to ensure education and teaching in conformity with their own religious and philosophical convictions’.
- 3.43 Faith-based education is therefore particularly important, contributing to a more diverse school system within Bridgend, offering greater opportunities for learner and parental choice. This extends to both Catholic and Church-in-Wales faiths and as such, even though there are no Church-in-Wales secondary schools in Bridgend, pupils attending the nearest suitable Church-in-Wales secondary school (that is the Bishop of Llandaff Church in Wales High School) will also retain eligibility for free home-to-school transport, including at Post-16.

- 3.44 Therefore, the following policy amendments to the local authority's current Home-to-School/College Transport Policy, are proposed.
- 3.45 The local authority's current Home-to-School/College Transport Policy includes significant discretionary arrangements. These discretionary arrangements are unsustainable both financially, and from the perspective of there being significantly less capacity in the current and future transport market to support the discretion offered by the local authority since the pandemic.
- 3.46 Therefore, it is recommended that Cabinet consider the following discretionary elements of the local authority's Home-to-School/College Transport Policy to both support the requirements for greater efficiency savings and to help address the ongoing pressure for school transport vehicles in respect of increasing statutory eligibility by creating free capacity across the sector.
- 3.47 In proposing a new public consultation, the main aim will be public engagement, in particular, pupils and their immediate families, to attempt to ascertain their views and what might be the impact on them if the proposed changes to the local authority's Home-to-School/College Transport Policy were implemented.

Withdrawal of transport for all learners benefitting from an identified and available (safe) walking route to school in line with statutory distances of two miles for primary school pupils and three miles for secondary school pupils

- 3.48 The local authority is satisfied that it has identified all the safe walking routes to schools in accordance with the Learner Travel (Wales) Measure and the Learner Travel Statutory Provision and Operational Guidance. The local authority's current Home-to-School/College Transport Policy states that, "As routes are reviewed, provision may be withdrawn where for example, identified hazards have been mitigated against."
- 3.49 There remain a significant number of pupils benefitting from free home-to-school transport where previously there was no assurance of the availability of an available (safe) walking route to school. Some pupils therefore receive free home-to-school transport even though they reside less than 500m from their school, as for these pupils, the local authority has previously determined not to invoke the above-mentioned policy arrangement and remove transport from them at this time.

Removal of 'sibling' and 'in-receipt' protection for pupils

- 3.50 This policy proposal will remove the inequity caused by the implementation of both the 'in-receipt' and 'sibling protection' elements of the current policy. There are approximately 340 pupils currently in receipt of free home-to-school transport who benefit from this policy exception. This policy arrangement has been the subject of significant challenge from parents/carers regarding its equity as it favours larger families and is detrimental to families with only one child. It often means that pupils entering Reception or Year 7 without older siblings in the same school are ineligible for free school transport. However, their peers, with older siblings in the same school, are eligible, as their siblings have passed down eligibility that preceded the 2016 policy change protecting those 'in receipt' of the former policy distances of two miles for primary school pupils and three miles for secondary school pupils.

Removal of transport for Nursery pupils

- 3.51 Home-to-school transport for Nursery pupils is non-statutory. The local authority provides this by discretion. In September 2020 Cabinet determined to retain this policy discretion and continue to provide Nursery transport to pupils residing over 1.5 from home-to-school attending their nearest suitable primary school. Observations by officers of Nursery pupils travelling on buses had identified significant health and safety risks principally associated with the age of the pupils travelling. However, Cabinet was minded not to remove this eligibility but to retain transport for Nursery pupils. However, Cabinet requested that officers 'move urgently to explore suitable mitigation in order to combat the risks'. Therefore, since 2021, all Nursery pupils have been transported on smaller taxi and minibus vehicles.
- 3.52 The current proposal seeks to remove this discretion given that Nursery education is non-statutory. Nevertheless, it is important to identify the local authority's duty to support Welsh-medium education and also faith-based education as identified in paragraphs 3.26-3.44 above. Therefore, for Welsh-medium schools and faith schools, it is proposed that the provision will be retained.

Removal of all Post-16 transport

- 3.53 There is no statutory duty to provide free transport for Post-16 learners to school or college. Pupils attending sixth forms in secondary schools' benefit from transport from home-to-school under the same distance criteria as pupils of statutory school age (that is, those living more than three miles from home to the nearest suitable (catchment) school receive free home-to-school transport). Similarly, those attending further education colleges receive free home-to-college transport to the closest college offering the first course of their choice as full-time study if they live over three miles from home-to-college. Sixth form pupils utilise the school buses provided for eligible pupils of statutory school age, while college learners are provided with free bus passes to make use of public service vehicles.

The offer to parents/carers of pupils with additional learning needs (ALN) the option of a 'personal transport budget'

- 3.54 Transport budgets are a way of ensuring that pupils with ALN are provided with home-to-school transport that meets their needs by their parents/carers. Such a budget would provide financial support to parents/carers on an individual basis as an offer for them to arrange their own transport to school for their child. The offer would not be mandatory, but as an offered alternative to local authority provided home-to-school transport. The offer would apply to pupils with ALN on dedicated or shared transport (for example, a special taxi or special minibus).
- 3.55 As some pupils often have very complex needs, in particular, those with medical conditions, it has become more difficult for the local authority to source suitable transport. Many transport operators have a limited number of suitable vehicles (for example, those with wheelchair accessible tail-lifts and/or suitably trained and experienced staff).
- 3.56 It is proposed that parents/carers would be offered the (current) Her Majesty's Revenue and Customs (HMRC) mileage rate of 45p per mile for the journey to and from school (for journeys up to 10,000 miles). For example, if the distance from

home-to-school was 5 miles, the daily personal transport budget would be in respect of 10 miles and therefore the personal transport budget would be £4.50 per day.

- 3.57 It is proposed that this offer would apply to all ALN on special taxis and minibuses equally regardless of the likelihood of this proposal invoking a saving to the local authority. For example, if the current daily rate of transporting three ALN pupils to a primary school learning resource centre is £120, it is possible that the personal transport budget offer, if taken up by only two of the three parents/carers, would invoke additional costs. This is because it would still be the responsibility of the local authority to transport the third child to school at the same likely cost of £120 per day. Therefore, while there may be some efficiency savings across the sector in proposing this approach, these are not guaranteed. However, the proposal could potentially create large numbers of vacant seats that would be available to support the transport needs of other pupils with statutory eligibility for free home-to-school transport.
- 3.58 It is important to note that any personal tax implications would be the responsibility of any parents/carers wishing to accept this offer.
- 3.59 Table 1 below provides a summary of the proposed policy changes as they apply to the current Home-to-School/College Transport Policy.

Table 1 Current and proposed learner travel policy arrangements

Transport for Post-16 students		
Pupil/learner type	Current arrangement	Proposed arrangement (from September 2025)
Post-16 learner (English-medium) Attending Bridgend College or the nearest college offering the first course of full-time study.	Free home-to-college transport provided over three miles from college or where there is no available walking route. This is normally provided via a public service bus pass).	No home-to-college transport provided.
Post-16 learner (English-medium) Attends sixth form at: <ul style="list-style-type: none"> • Brynteg School • Pencoed Comprehensive School • Cynffig Comprehensive School 	Free home-to-school transport provided over three miles from school, or where there is no available walking route. This is normally provided via a contracted school bus, minibus, or taxi.	No home-to-school transport provided.

Transport for Post-16 students		
Pupil/learner type	Current arrangement	Proposed arrangement (from September 2025)
<ul style="list-style-type: none"> • Porthcawl Comprehensive School • Coleg Cymunedol Y Dderwen • Maesteg School • Bryntirion Comprehensive School 		
Post-16 learner (Welsh-medium) Attends sixth form at Ysgol Gyfun Gymraeg Llangynwyd	Free home-to-school transport provided over three miles from school, or where there is no available walking route.	No change.
Post-16 learner (faith-based education) Attends sixth form at Archbishop McGrath Catholic High School or Bishop of Llandaff Church in Wales High School.	Free home-to-school transport provided over three miles from school.	No change.
Post-16 learner with ALN in specialist provision	Free home-to-school transport provided if over three miles from school, or where there is no available walking route. Free home-to-school transport also provided at the discretion of the local authority based on the individual needs of learner.	Free home-to-school transport provided at the discretion of the local authority following an assessment of the needs of the individual learner.
Post-16 learner with ALN not in a specialist provision	Free home-to-school transport provided over three miles from school or	Free home-to-school transport provided at the discretion of the local authority following an assessment of the needs of the learner.

Transport for Post-16 students		
Pupil/learner type	Current arrangement	Proposed arrangement (from September 2025)
	where there is no available walking route.	

School transport for secondary school pupils		
Pupil/learner type	Current arrangement	Proposed arrangement (from September 2025)
<p>Secondary school pupil (English-medium, Welsh-medium, and faith-based education)</p> <p>Age 11-16</p> <p>Attends a secondary school which is their nearest suitable school, and they live over three miles from the school or there is no available walking route exists.</p>	<p>Free home-to-school transport is provided.</p> <p>Free transport is provided to the siblings of pupils who previously had protection under the former Learner Travel Policy of eligibility for free transport over two miles from home to their nearest suitable school.</p>	<p>Removal of the 'sibling rule' so all pupils are equally eligible (that is, where they live over three miles from their nearest suitable school).</p>

School transport for primary school-age pupils		
Learner type	Current arrangement	Proposed arrangement (from September 2025)
<p>Primary school pupil (English-medium, Welsh-medium, and faith-based education)</p> <p>Age 5-11</p> <p>Attends a primary school which is their nearest suitable school, and they live over two miles from the school or no available walking route exists.</p>	<p>Home-to-school transport is provided.</p> <p>Free transport is provided to the siblings of pupils who previously had protection under the former Learner Travel Policy of eligibility for free transport over 1.5 miles from home to their nearest suitable school.</p>	<p>Removal of the 'sibling rule' so all pupils are equally eligible (that is, where they live over 2 miles from their nearest suitable school).</p>

School transport for primary school-age pupils		
Learner type	Current arrangement	Proposed arrangement (from September 2025)

Transport for Nursery pupils		
Learner type	Current arrangement	Proposed arrangement (from September 2025)
Nursery pupil (English-medium) Age 3-4 Attends nursery school which is their nearest suitable school, and they live over 1.5 miles from the school or no available walking route exists.	Home-to-school transport is provided.	No home-to-school transport provided.
Nursery pupil (Welsh-medium and faith-based education) Age 3-4 Attends Nursery school which is their nearest suitable school, and they live over 1.5 miles from the school or no available walking route exists.	Home-to-school transport is provided.	No change.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 An initial Equality Impact Assessment (EIA) screening has identified that there would be no negative impact on those with one or more of the protected characteristics, on socio-economic disadvantage or the use of the Welsh Language as a result of this consultation. It is therefore not necessary to carry out a full EIA on this policy or proposal.
- 4.2 However, a full EIA will accompany any recommendations to Cabinet following the conclusion of the consultation.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

Long-term	Ongoing reliance on the local authority to provide free home-to-school transport where this is not supported by national policy will have a significant impact on the ability of the local authority to support and sustain other critical services long-term. National government policy supports active travel and the reduction in the reliance on private and public transport. Benefits include the reduction in emissions, less dependence on fossil fuels and improvements to health and wellbeing.
Prevention	The proposal to remove discretionary transport is not taken lightly. However, there are current tensions in respect of the inequity in the current policy. The proposal, therefore, is for a public consultation to address the inequity in the local authority's Home-to-School/College Transport Policy and to ensure that budget efficiencies are made.
Integration	The local authority has a strategic role in facilitating the attendance of pupils to school where they are eligible for free home-to-school transport or where it is provided under the discretion of the local authority.
Collaboration	The local authority works closely with schools and parents/carers to ensure that the needs of pupils/learners are taken into consideration in the identification and delivery of transport services.
Involvement	The local authority intends to involve all sectors of society in consulting on its proposals. This will involve sufficient time and resources to fully identify, understand and respond to the issues identified for individuals and their communities.

6. Climate Change Implications

- 6.1 The local authority is projected to spend approximately £9.862m in 2023-2024 financial year on home-to-school transport. The use of private transport for this purpose is therefore a significant contributor to carbon emissions as 317 individual home-to-school transport contracts currently operate daily.

- 6.2 The proposals contained in this report will add to the local authority reductions of carbon emissions from private transport operators, but more widely, may increase journeys by the public and consequently carbon emissions from parents/carers. Nevertheless, the local authority promotes the use by school transport operators of ultra-low or zero emission vehicles in the procurement of school transport contracts and this will continue to be an important agenda in delivering home-to-school transport arrangements moving forward.

7. Safeguarding and Corporate Parent Implications

- 7.1 The Home-to-School/College Transport Policy is aligned with the local authority's Corporate Parenting Strategy and provides dedicated transport support to care experienced/looked-after children on a case-by-case basis.

8. Financial Implications

- 8.1 The learner transport budget has been under significant financial pressure for many years. Home-to-school/college transport spend has increased from £6.021m at the end of 2020-2021 to a projected £9.827m at end of 2023-2024. However, the 2023-2024 budget is currently £8.625m.
- 8.2 Therefore, while there has been additional annual budget growth, this has only addressed the additional costs brought about primarily through increased contractor prices, changes to eligibility for pupils and additional costs associated with transporting pupils with ALN and those looked after by the local authority. Since the pandemic, the transport market has been depressed with significantly higher prices year-on-year. Even with the significant increase in budget between 2020-2021 and 2023-2024, there is still a projected overspend of £1.2m at the end of the 2023-2024 financial year.
- 8.3 Table 2 below summarises the proposals being put forward for consideration and the associated potential annual MTFS savings.
- 8.4 It is important to note, that if following the aforementioned public consultation, Cabinet is minded to accept any or all of these proposed policy changes, the changes must be published by 1 October 2024, to be implemented from the start of the 2025-2026 school year in September 2025, as per the requirements of the Learner Travel Information Regulations 2009.

Table 2 Approximate annual savings for learner transport provision

Proposal	Potential annual savings
Withdrawal of legacy transport for all learners benefitting from an identified and available (safe) walking route to school, to fall in line with the statutory distances of 2 miles for primary school-age pupils and 3 miles for secondary school-age pupils.	£200k
	£300k

Removal of legacy 'sibling' protection for pupils.	
Removal of all transport for nursery pupils (excluding pupils attending their nearest suitable Welsh-medium or faith school).	£30k
Removal of all Post-16 transport (excluding pupils attending the following schools: <ul style="list-style-type: none"> • Ysgol Gyfun Gymraeg Llangynwyd; • Archbishop McGrath Catholic High School; and • The Bishop of Llandaff Church in Wales High School. 	£500k
The offer to parents/carers of pupils with additional learning needs (ALN) the option of a 'transport budget' providing a mileage allowance of £45p per mile	Unknown. Dependent on take-up of offer.
Total potential savings	£1.03m

9. Recommendation

9.1 Cabinet is recommended to approve a 12-week consultation on the following proposals:

- Withdrawal of legacy transport for all learners benefitting from an identified and available (safe) walking route to school, to fall in line with the statutory distances of two miles for primary school-age pupils and three miles for secondary school-age pupils.
- Removal of legacy 'sibling' protection for pupils.
- Removal of all transport for nursery pupils (excluding pupils attending their nearest suitable Welsh-medium or faith school).
- Removal of all Post-16 transport excluding pupils attending the following schools:
 - Ysgol Gyfun Gymraeg Llangynwyd;
 - Archbishop McGrath Catholic High School; and
 - The Bishop of Llandaff Church in Wales High School.
- The offer to parents/carers of pupils with ALN the option of a 'personal transport budget' providing a mileage allowance of 45p per mile.

Background documents

None

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Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	INFORMATION REPORT FOR NOTING
Report Owner / Corporate Director:	CHIEF OFFICER – LEGAL AND REGULATORY SERVICES, HR AND CORPORATE POLICY
Responsible Officer:	MICHAEL PITMAN – TECHNICAL SUPPORT OFFICER DEMOCRATIC SERVICES
Policy Framework and Procedure Rules:	There is no effect upon the policy framework and procedure rules.
Executive Summary:	To update Cabinet with an information report for noting on the Care Inspectorate Wales' (CIW) inspection of Bridgend County Borough Council's (BCBC) regulated services in Adult Social Care.

1. Purpose of Report

- 1.1 The purpose of this report is to inform Cabinet of the Information Report for noting that has been published since its last scheduled meeting.

2. Background

- 2.1 At a previous meeting of Council, it was resolved to approve a revised procedure for the presentation to Council of Information Reports for noting.

3. Current situation / proposal

3.1 Information Report

The following Information Report has been published since the last meeting of Council:-

<u>Title</u>	<u>Date Published</u>
Care Inspectorate Wales' (CIW) inspection of Bridgend County Borough Council's (BCBC) regulated services in Adult Social Care	12 March 2024

3.2 Availability of Document

The document has been circulated to Elected Members electronically via email and placed on the Bridgend County Borough Council website. The document is available from the above date of publication.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. This is an information report, therefore it is not necessary to carry out an Equality Impact assessment in the production of this report. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

5. Well-being of Future Generations Implications and Connection to Corporate Well-being Objectives

- 5.1 The well-being goals identified in the Act were considered in the preparation of this report. It is considered that there will be no significant or unacceptable impacts upon the achievement of well-being goals/objectives as a result of this report.

6. Climate Change Implications

- 6.1 There are no Climate Change Implications from this report.

7. Safeguarding and Corporate Parent Implications

- 7.1 There are no Safeguarding and Corporate Parent Implications from this report.

8. Financial Implications

- 8.1 There are no financial implications in relation to this report.

9. Recommendations

- 9.1 That Cabinet acknowledges the publication of the report referred to in paragraph 3.1 of this report.

Background documents

None

Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	CARE INSPECTORATE WALES (CIW) INSPECTION OF BRIDGEND COUNTY BOROUGH COUNCIL'S (BCBC) REGULATED SERVICES IN ADULT SOCIAL CARE
Report Owner / Corporate Director:	CORPORATE DIRECTOR, SOCIAL SERVICES & WELLBEING
Responsible Officer:	JACKIE DAVIES HEAD OF ADULT SOCIAL CARE
Policy Framework and Procedure Rules:	There is no effect upon the Policy Framework and Procedure Rules
Executive Summary:	<p>Care Inspectorate Wales (CIW) are the independent regulators of social care and childcare services in Wales and inspect care service providers against the requirements of relevant legislation including the Regulation and Inspection of Social Care (Wales) Act 2016 (RISCA) and the Social Services and Well-being (Wales) Act 2014.</p> <p>CIW are required to:</p> <ul style="list-style-type: none"> • Carry out functions on behalf of Welsh Ministers to provide assurance on the quality and safety of services • Decide who can provide services • Inspect and drive improvement of regulated services and local authority social services • Undertake national reviews of social care services • Take action to ensure services meet legislative and regulatory requirements <p>This report provides Cabinet with information on the regulatory activity undertaken by CIW across Bridgend County Borough Council's Adult Care Services in 2023.</p> <p>The inspections in the accommodation based and domiciliary regulated support services report against core themes:</p> <ul style="list-style-type: none"> • Well-being • Care and Support

	<ul style="list-style-type: none"> • Leadership and Management • Environment (residential care only) <p>Summaries of the inspections are contained in this report and include:</p> <ul style="list-style-type: none"> • Key findings of how we have performed against standards in our residential and domiciliary regulated services. • Activity undertaken to meet regulatory standards. • Actions to address areas of improvement and non-compliance notices.
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1. Purpose of Report

- 1.1 This report was presented to Subject Overview and Scrutiny Committee on 19th February 2024 and is presented as an information report to Cabinet to update on the outcome of the Care Inspectorate Wales (CIW) inspections of Bridgend County Borough Council's (BCBC) Regulated Services in Adult Social Care in 2023. This report relates to inspection activity detailed below:

Service	Visit Date	Publication Date
Ty Llwynderw Extra Care (Residential Provision)	09/02/2023	31/03/2023
Bryn y Cae Residential Services for Older Persons	17/03/2023	01/03/2024
Breakaway Short Stay Service	14/04/2024	13/06/2023
Bridgend CBC Domiciliary Care Services	18/05/2023	03/07/2023
Ty Ynysawdre Extra Care (Residential Provision)	05/07/2023	22/08/2023
Ty Cwm Ogwr Residential Home for Older Persons	24/07/2023	04/09/2023

2. Background

- 2.1 These inspections were conducted in line with the CIW Inspection framework for accommodation-based and domiciliary support services, to evaluate the services' adherence to legislative and regulatory requirements, principally The Regulated Services (Service Providers and Responsible Individuals) (Wales) Regulations 2017, and the conditions of registration and the individual service's statement of purpose. The inspections also evaluate the services' ability to provide the Welsh Language active offer. In doing so, CIW are aiming to ensure that people using the services are supported to achieve the best possible quality of support, achieve their identified outcomes, are not placed at risk and do not experience harm. The inspections are undertaken in consideration of four core themes:

- The wellbeing of individuals receiving care and support
- The quality of care and support provided to individuals.
- The leadership and management of the service
- Environment (except domiciliary services)

The reports are presented with a short summary, followed by findings under these core themes.

- 2.2 Ty Ynysawdre, Ty Llwynderw, Ty Cwm Ogwr and Bryn y Cae provide support to adults in the main over 65 years of age in a residential care home setting.

Breakaway provides short stay residential for adults aged 18 years and over with a range of needs including learning disabilities, Autism Spectrum Disorder (ASD) and physical disabilities in a residential setting.

Bridgend County Borough Council Domiciliary Service is a complex umbrella service, which incorporates short and long term home care and support services encompassing; the learning disability supported living services; Glyn Cynffig hostel Ty Mor Young Persons Service; HMP Parc and the domiciliary provision located within the extra care facilities at Ty Llwynderw and Ty Ynysawdre. Therefore, the service provides care and support for adults of all ages and with a wide range of needs.

- 2.3 During the inspection, the inspectors review a range of information including policies, statements of purpose, written guides, complaints information, incident reports, supervision data, training data, safeguarding referrals and quality assurance reports. The inspector may ask for this information to be provided electronically and uploaded onto the secure portal CIW Online. Inspectors aim to engage with individuals in receipt of care and support and their families to gather first-hand feedback about the services they receive.
- 2.4 All reports are initially received prior to publication from CIW along with an Inspection Response Form, which can be used to comment of the factual accuracy or the fairness and proportionality of findings within the reports.
- 2.5 There is a requirement under the Regulation and Inspection of Social Care (Wales) Act 2016 (RISCA) to have a nominated Responsible Individual (RI) which for these services is the Group Manager for Provider Services. The RI is legally accountable for the provision of care and support and is required to have oversight of the running of the services. In addition, there are also registered managers (RM) in post, who are suitably qualified and registered with Social Care Wales as required under RISCA.

3. Current situation / proposal

- 3.1 The reports have identified that the standard of care and support provided across the services is of a good standard. Key strengths include the relationships between staff and individuals receiving care and support; leadership and management, the provision of activities; individuals happy with their care and support and their needs being well met, choice of meals and positive mealtime experiences.

The previous themes around non-compliance with policies and procedures and staff support and development have now been achieved across the services.

- 3.2 There are some areas for improvement identified within the reports, which will be addressed at the individual service level.
- 3.3 **Key inspection findings for Ty Llwynderw (Residential):**

The report identified that people live in a warm and friendly environment which is clean and well maintained. The staff know the individuals and facilitate interaction and conversations with them throughout the day. Personal plans and risk assessments are in place and are reviewed regularly. Staff receive regular supervision to discuss professional issues and development needs. There is good management oversight and governance of the service. At the time of the inspection there was no nominated RI, however the person applying for the role had visited the home and was aware of the regulatory requirements. This service is working towards providing an 'Active Offer' of the Welsh Language.

- Wellbeing – People are treated as individuals and are supported to make choices throughout their day. People were observed getting up when they wanted to and requesting to play games or watch films. People are supported to be as healthy as they can be by receiving holistic care from a variety of health and social care professionals and there are good links with GP surgeries, community nurses and other allied health professionals. Medication guidance has been provided and staff complete competency assessments between training refreshers. Medication is stored safely and part of a medication round was observed that indicated care staff are competent in administration of medication. There are systems in place to safeguard people and risks to individual health and safety are included in care plans and risk assessments. There are appropriate policies in place and staff have completed safeguarding training. There is a person living at the service who speaks Welsh as well as English and care staff speak incidental Welsh to them as much as they can.
- Care and Support – The service encourages individuals to interact with each other and to be as active as possible throughout the day. One family member commented “I just can’t fault what they do. I come every day, different times, it’s always the same. They’re just lovely here”. On the day of the visit two people were being cared for in bed due to ill health and care staff were observed checking in on them and delivering their care in a friendly but sensitive manner. In addition the manager was arranging access to a guest room for one person’s family who were travelling long-distance to visit an ill relative. Personal plans contain information on people’s needs and the support that is required to assist them with each aspect of daily living and there was evidence that they are reviewed when situations change. A thorough handover is completed between shifts. People have choice over their meals and there is a good rapport between individuals and kitchen staff in the dining room. There are systems in place to promote infection control and good hygiene and staff were observed using personal protective equipment (PPE) appropriately.
- Environment – Ty Llwynderw is part of a wider complex owned by Linc Cymru, which includes a variety of facilities such as a spa room, a salon and a restaurant. Utility areas are kept locked to safeguard people from potential hazards and the residential unit is secure from unauthorised persons. All bedrooms are en-suite and there are spacious communal areas. Bedrooms are personalised with décor and belongings. Linc Cymru provide effective maintenance, domestic and laundry services. Fire equipment and alarms are checked regularly and evacuation plans are stored by the fire box in case of an emergency.

- **Leadership and Management** – Many of the staff have worked at the service since it was opened and recruitment to the service has been successful. Due to long-term sickness absence, agency staff are being used. One staff member commented “It has been hard, but we all want the best for the people that live here so we try to cover as many shifts ourselves as we can and the manager is on it, you can call her for any problem or mistake, and she’ll come and help you sort it out”. Care staff are appropriately recruited and checked. Staff are appropriately trained and supported in their roles. Progress has been made on completing mandatory training and more training courses have been made available. Supervision and appraisal are held as frequently as required. There are systems in place to monitor the quality of the service provided. Quarterly monitoring visits have been completed by the previous RI. A biannual quality of care report has been completed to identify what is working well and what improvements are needed. Policies and procedures are in place and have been reviewed and updated.

3.4 **Key inspection findings for Bryn y Cae:**

The service provides support in a warm and friendly environment. Staff know people well and interact in a kind and caring manner. Activities and projects at the service are regular and varied to ensure people’s physical and emotional well-being. Audits and oversight by the management team are carried out. Staff feel supported, happy, confident in their roles and receive regular supervision and training. Policies have been or are in the process of being reviewed and updated. The service provides an ‘Active Offer’ of the Welsh language.

- **Wellbeing** – People are supported to have control over their lives and personal plans are clear and regularly reviewed. The statement of purpose outlines the service provided and how to raise a complaint, although there have not been any in the period since the previous inspection. There are good systems in place to promote physical and emotional health and there is good access to healthcare as required for each individual. The reablement service has access to allied healthcare professional such as Occupational Therapists and Physiotherapists. Staff work to offer choice of meals with a four weekly menu that is varied and nutritious. People make suggestions for the menu and alternative dietary needs are considered. Staff can identify risk of harm and abuse. Risks to people’s health and safety are included in personal plans and risk assessments. Policies are in place around safeguarding and whistleblowing and the manager and staff understand the requirements when reporting a potential safeguarding issue. People feel safe at Bryn y Cae and feedback is extremely positive. People maintain contact with loved ones through visits, telephone calls and digital platforms. Individuals’ communications needs are considered and the service provides the Welsh Active Offer.
- **Care and Support** – The service considers a wide range of views and information to confirm it can meet individuals’ needs and outcomes. The manager completes a pre-admission assessment and these were evident on care files. Care plans are accurate and up to date. Staff know people well and interactions are warm and friendly. Feedback is positive. One person commented “Staff are marvellous, food is fabulous. “I’m loving it here. I like the arts and crafts. Relatives commented Its’s

lovely here. Exceptional. I've seen worse hotels. Staff are marvelous". People have good care and support and access to healthcare and other services. The medication policy is in the process of being updated. Protocols and arrangements are in place for the safe and appropriate management of medication. There are Welsh speaking staff at the service and others are completing a Welsh language course. Signage around the home is bilingual. The infection control policy is in the process of being updated, but Public Health Wales (PHW) guidance and risk assessments are in place to prevent infection including COVID-19. Staff were observed appropriately using PPE and other preventative measures such as additional cleaning were also observed.

- **Environment** – The home is accessible and safe with appropriate security measures in place. The environment is warm, welcoming, spacious and odour free. The building is homely with personalisation throughout. Outdoor spaces have been developed involving residents and donations from the local community, are accessible to people, but secure. There is a maintenance staff member on site and records of compliance with health and safety requirements was evident. The provider has not yet completed fire safety work required following a fire safety inspection in February 2022.
- **Leadership and Management** – Staff are suitably fit to work in care and are recruited appropriately. Staff are supported to undertake training to ensure they have the knowledge and skills to provide care and support to help people achieve their personal outcomes. Most staff receive regular supervision and appraisals to support their wellbeing and personal development. Staff were happy and confident in their jobs and felt supported by management. One staff member commented "I'm loving it. Learning all time". People have access to information about the service and the statement of purpose and service guide are up to date. Policies and procedures are in place including Safeguarding and Whistleblowing. Other policies have been or are in the process of being reviewed and updated. Processes are in place to monitor the quality of the service. The RI carries out monitoring and provides good support to the management. RI visits take place and recommend areas for improvement. Quality of care reviews are completed every six months.

3.5 Key inspection findings for Breakaway:

Care staff follow an active support model, which encourages people to maintain their independence. Following several changes in management and staff last year, the staff team is now stabilising and is well led by a hands-on management team. Personal plans are outcome focused and regularly reviewed and encompass information gathered from the person, relatives and other professionals involved in their care. Staff are trained and supervised to be competent in their roles. The new designated RI is currently completing their application with CIW and show good awareness of their role in oversight and quality assurance.

- **Wellbeing** – People are supported to have control of their daily routines and can ask for their preferred foods. Staff facilitate people to continue in their usual jobs, education or day care services. Care staff were observed meeting people for the first time and interactions were warm. People were using different communication methods and technology to settle themselves into their stay and interact with new people. The service is adapting to people's needs to make it the most accessible it can be. There are systems in place to safeguard people and risk assessments

are included as part of people's service delivery plans. Staff are trained in safeguarding and there is a policy in place for guidance. There are communal areas where staff encourage people to congregate, interact and share meals.

- **Care and Support** – The manager and senior staff have completed new service delivery plans and risk assessments for everyone who is currently using the service. They are person-centred and contain relevant multi-disciplinary input. People are supported to be as healthy as they can be. Care staff follow a key worker model, whereby one staff member oversees the day of one individual and tailors the care and support and activities provided. Medication is stored safely and administration is accurately recorded. A medication policy has now been agreed and will replace interim guidance. The service promotes infection control practices and there is an updated infection control policy in place.
- **Environment** – The environment promotes achievement of people's personal outcomes and is well maintained. Individual bedrooms are spacious and neutral. People bring in personal items for their stay. The community spaces are clean, tidy and comfortable and there is a large, accessible outdoor space. The house is secure and areas of the home that may contain hazardous items are kept locked. Personal information is kept securely.
- **Leadership and Management** – Care workers were positive about the management team. One commented "They're brilliant, they listen to our suggestions, they are very supportive". Staff are safely recruited and suitably trained. External professionals have worked with the service to provide specialist training. Staff have regular supervision to discuss professional issues and development. There is good oversight of the quality of care. The new RI applicant has completed a monitoring visit and the report evidences that they have analysed feedback and events in the home and identified actions for themselves or management to complete. There has been improvement in the content of policies and procedures.

3.6 Key inspection findings for Domiciliary Care Services:

People receive care from happy, well supported, staff who receive regular supervision. Staff training has improved since the previous inspection to ensure that staff have the knowledge and skill to carry out their roles and raise concerns. People have accurate and up to date personal plans and they and their relatives are complimentary about the staff and the service. There is a new RI in place. Some policies have been reviewed and updated and there is now a policy officer in place. People's language and communication needs are considered. The service is working towards providing an 'Active Offer' of the Welsh language.

- **Wellbeing** – Staff develop plans with the individual and their representative, using recognised assessment tool and people have choice about the care and support that they receive. People provide feedback about the service that they receive by a variety of methods which contributes to quality assurance. People's needs and risks to their safety and well-being are documented in personal risk assessments. Up to date Safeguarding and Whistleblowing policies are in place.

- **Care and Support** – People and their families have positive relationships with staff and communication is good. Service guides are available for different parts of the service and the Statement of Purpose is consistent with the service provided. Feedback from people and their families is positive. One commented about staff “Excellent. I’d give them five stars. Even if I paid more I couldn’t get any better”. There are measures in place to assist people with their medication. There is an updated medication policy in place and measures are in place to provide improved medication training compliance. Staff receive safeguarding training and feel confident that they would know what to do if they were concerned about someone at risk of harm. Staff are training in infection prevention and control and there is an updated policy in place. There was a good supply of PPE and people receiving care and support said that staff use PPE when in their homes.
- **Leadership and Management** – Staff are knowledgeable and feel supported by the management teams. There is an induction process in place which includes training and shadowing colleagues. Staff have regular supervision which includes discussions around their wellbeing, professional development, observations and competency assessments. Staff receive a variety of online and face to face training, which has improved since the previous inspection. Staff feel happy and confident, one commented about management “They’re great, flexible, marvelous. Couldn’t fault them”. Recruitment is safe and robust and all staff have up to date DBS checks. Recruitment is ongoing using online platforms, attending job fayres, internal and external advertising and incentives for existing and new staff such as an electric car scheme and a pilot project to look at staff roles. There are quality assurance processes in place and the new applying Responsible Individual (RI) has good day to day oversight. Quality of care reports and quality assurance audits are up to date. The complaints policy has been updated and a number of other policies and procedures have also been reviewed since the last inspection.

3.7 Key inspection findings for Ty Ynysawdre (Residential):

The service provides support to people in a warm and friendly environment. Staff know people well and spend time and engage with them throughout the day. Personal plans and risk assessments contain all the necessary information. The residential unit is well maintained and people’s spaces are personalised. The manager and RI are currently absent, but interim cover arrangements are in place and the deputy manager is supported by their line manager and RI. The service does not provide an ‘Active Offer’ of the Welsh language.

- **Wellbeing** – People are supported to exercise choice over their daily routines are able to move freely between communal areas and their own space. People are encouraged to interact with each other and staff and are engaged in a variety of activities. At lunch time a member of staff was observed showing people their meal option to choose what they wanted and to decide on their desired quantity. People are offered drinks throughout the day. People are supported to be as healthy as they can be in conjunction with care from a variety of health and social care professionals and there are good links with GP surgeries, community nurses and other allied health professionals. Medication is stored safely and part of a medication round was observed that indicated care staff are competent in the administration of medication. There are systems in place to safeguard people and risks to individual health and safety are included in care plans and risk assessments. There are appropriate policies in place and staff have completed

safeguarding training. There is not anyone currently living at the service who requires the service in the medium of Welsh, but documents are available bilingually upon request.

- **Care and Support** – Warm interactions were observed between care workers and people living at the service. One person commented “this is a nice place, the staff are very friendly”. Care staff have the information needed to be able to provide the care needed. Applications for Deprivation of Liberty Safeguards (DoLS) are kept on files. Risk assessments note the risk to people’s safety and the threshold at which care workers will need to intervene. A thorough handover is completed between shifts. There are systems in place to promote infection control and good hygiene and staff were observed using PPE appropriately.
- **Environment** – Ty Ynysawdre is part of a wider complex owned and maintained by Linc Cymru. There are a variety of facilities such as a spa room, a salon and a restaurant. Utility areas are kept locked to safeguard people from potential hazards and the residential unit is secure from unauthorized persons. All bedrooms are en-suite and there are spacious communal areas. Bedrooms are personalised with décor and belongings. Linc Cymru provide effective maintenance, domestic and laundry services. Fire equipment and alarms are checked regularly and evacuation plans are stored by the fire box in case of an emergency.
- **Leadership and Management** – People receive care from a consistent staff team who are familiar with their needs. Agency staff have been used to supplement sickness absence. The manager is absent and the deputy manager and team leader are covering the role and no negative impact was found. Staff comments included “I’ve had all my supervisions and can talk to the deputy manager about anything.” Another said “Agency staff don’t make any extra work for us, they are helpful and the know what they’re doing”. Care staff are appropriately recruited and checked. Care staff undertake mandatory and supplementary training. Supervisors practice observations and medical competencies are completed regularly throughout the year. Processes are in place to monitor the quality of service provision. The RI is currently absent, but the previous RI is providing temporary cover as they are familiar with the service, staff team and the people who live there. Quarterly quality assurance visits have been completed which contribute the biannual quality of care reviews. These identify areas of strengths and improvement. The statement of purpose is up to date and there are relevant and up to date policies and procedures in place.

3.8 Key inspection findings for Ty Cwm Ogwr:

People living at the service are settled and comfortable and there is a relaxed atmosphere. Personal plans give information about people and some care needs, however they require further development to ensure that they are person centred. People are supported to make choices about their daily living and are supported by dedicated and experienced staff. Staff feel supported by the new manager and receive training relevant to their roles. Recruitment practice is robust and staff receive regular supervision. The RI maintains sufficient oversight of the service. The service is working towards providing an ‘Active Offer’ of the Welsh Language.

- Wellbeing – People wishes are taken into account to support decision making and people are clear about how to make their feelings known. Those lacking capacity to make decisions are supported by professional advocates or relatives. People have choice over where they spend their time and there is a new programme of activities in place. Bedrooms are personalised to individual taste. There is a varied choice of meals and snacks. Care staff have undertaken safeguarding training and are aware of procedures to protect people from harm and neglect. Policies are in place which are being reviewed and risk assessments are in place to minimize risk to people and staff. There is a new management structure in place and feedback has been positive. The service supports people to be as healthy as they can be and there was evidence of regular contact with GPs, community nursing and other specialist services. Medication is stored safely and observations were made of correct administration and recording. Personal plans need improvement to ensure the information is person centred and consistently completed.
- Care and Support – Pre-admission assessments are completed to ensure people's needs can be met by the service. Care staff have a good awareness of people's likes, preferences and care needs, but this needs to be better documented in personal plans. Daily records indicate that people are receiving appropriate care but could be more detailed to include emotional well-being. Care staff are very attentive and responsive to people's needs with appropriate levels of prompting and support. Staff are friendly and people respond positively. One relative commented "I'm absolutely happy with the care and us as a family are happy that X is being so well looked after". Staff can identify when people may be at risk of harm or neglect and are aware of safeguarding and whistleblowing procedures. Medication is stored safely and medication audits ensure staff maintain good practices and identify areas for improvement.
- Environment – The building is secure and records of visitors are kept. Care files are stored securely. The accommodation is pleasant and of a good standard with personalisation of bedrooms. There are two units with one of them being specifically for people with a diagnosis of dementia. Communal areas are well utilised and people interact happily. Signage around the home is provided in Welsh and English. The service provides a clean and well-maintained environment with adequate equipment to meet people's needs. Cleaning materials are managed safely and procedures are in place to prevent the spread of infection.
- Leadership and Management – Staff are suitably recruited and checked. Care staff said that they were sufficiently trained to undertake their roles and the training matrix showed a range of core and specialist training for staff. Staff receive regular supervision and appraisals and regular staff meetings are held. Staff felt that they were able to talk to the new manager; one commented "She gets things done for the residents". The RI conducts regular visits and the six-monthly quality of care reports consider the standard of services offered. A selection of policies and procedures were looked at and were up to date and sufficiently detailed. The service benefits from having a stable staff team and rotas are managed appropriately. The new manager demonstrates a good understanding of the service and its current strengths and areas for improvement. The service operates in line with its statement of purpose and there is an information leaflet for people using the service.

3.9 Areas of Improvement and Priority Actions Notices

It is pleasing to note that the inspections did not result in the issue of any Priority Action Notices across services and that previous areas of improvements had been addressed in all cases.

The report for Ty Llwynderw did not identify any Priority Action Notices or Areas for Improvement and noted that previous actions for non-compliance with Regulation 36 (Supporting and developing staff) had been completed.

The report for Bryn y Cae did not identify any Priority Action Notices and noted that previous actions for non-compliance with Regulation 12 (Policies and procedures) had been completed.

It did however identify a new Area for Improvement this being: -

Area for improvement – Bryn y Cae	
Regulation	Summary
57	The Provider must ensure Fire Safety work is carried out promptly to reduce the risk of fire at the service.

The report for Breakaway did not identify any Priority Action Notices or Areas for Improvement but noted that previous actions for non-compliance with Regulation 12 (Policies and procedures) had been completed.

The report for Bridgend County Borough Council Domiciliary Care Services did not identify any Priority Action Notices or Areas for Improvement but noted that previous actions for non-compliance with Regulation 12 (Policies and procedures) and Regulation 36 (Supporting and developing staff) had been completed.

The report for Ty Ynysawdre did not identify any Priority Action Notices or Areas for Improvement.

The report for Ty Cwm Ogwr did not identify any Priority Action Notices but noted that previous actions for non-compliance with Regulation 36 (Supporting and developing staff) had been completed. The report noted that previous non-compliance with Regulation 58 (Medicines) had been achieved but identified a new Area of Improvement this being:-

Area for improvement – Ty Cwm Ogwr	
Regulation	Summary
58	Personal Plans need to be updated to accurately reflect people's care and support needs and mitigate risk.

- 3.10 The areas for improvement are being addressed and achievement of the actions is monitored through the Council's regulatory tracker which is reported to Governance and Audit Committee and through the Corporate Performance Assessment process.

4. Equality implications (including Socio-economic Duty and Welsh Language)

- 4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.
- 4.2 Despite no equality impact assessment being conducted the information contained in the report positively describes support being made available to those providing care.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

- 5.1 The implementation of the duties and responsibilities under the Social Services and Well-being (Wales) Act 2014 (SSWBA), in turn, supports the promotion of two of the seven goals of the Well-Being of Future Generations (Wales) Act 2015 within the County Borough of Bridgend. By promoting an environment that maximises people's physical and mental well-being and by supporting children, young people, adults and their carers and families to fulfil their potential no matter what their circumstances, the wellbeing goals of a healthier and more equal Bridgend and Wales are supported.
- 5.2 The Well-being of Future Generations (Wales) Act 2015 provides the basis for driving a different kind of public service in Wales, with five ways of working to guide how the Authority should work to deliver wellbeing outcomes for people. The following is a summary to show how the five ways of working to achieve the well-being goals have been considered in this report:
- Long Term – Social Services is demand led and the SSWBA focusses on sustainable prevention and wellbeing outcomes for the future. There is a requirement to meet the needs of people in the longer term and, because of rising demographics and increasing complexity, the remodeling and transformation of services continues to be a priority.
 - Prevention – the report is about the new approaches adopted by the Directorate in line with the SSWBA, for example, the provision of assistance to enable people to remain independent for as long as possible. This will ensure that need is anticipated and resources can be more effectively directed to better manage demand.
 - Integration – the implementation of the SSWBA requires local authorities to work with partners, particularly the NHS and the Police, to ensure care and support for people and support for carers is provided.

- Collaboration –The strategic planning and local delivery of integrated support and services are developed with partners such as Registered Social Landlords in order to provide the best possible intervention to people.
- Involvement – the key stakeholders are the people who use social care. There is considerable engagement including surveys, stakeholder meetings, feedback forms and the complaints process. The provision of accessible information and advice helps to ensure that the voice of adults, children and young people is heard.

6. Climate Change Implications

6.1 There are no climate change implications associated with this report.

7. Safeguarding and Corporate Parent Implications

7.1 It is a regulatory requirement that BCBC's Safeguarding Policy meets Part 8 of The Regulated Services (Service Providers and Responsible Individuals) (Wales) Regulations 2017 which is to ensure service providers have in place the mechanisms to safeguard vulnerable individuals to whom they provide care and support. This includes arrangements that:

- Support vulnerable individuals using the service
- Support and underpin staff knowledge, understanding and skill in identifying risks and action to take where abuse, neglect or improper treatment is suspected or identified; and
- Ensure the service provider works collaboratively with partners to prevent and take action where abuse, neglect or improper treatment is suspected or identified

8. Financial Implications

8.1 There are no financial implications associated with this report.

9. Recommendation

9.1 Cabinet is recommended to note the outcome of the CIW Inspections of the Council's Regulated Services in Adult Social Care.

Background documents

None

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Meeting of:	CABINET
Date of Meeting:	12 MARCH 2024
Report Title:	CABINET, COUNCIL AND OVERVIEW AND SCRUTINY COMMITTEES FORWARD WORK PROGRAMMES
Report Owner / Corporate Director:	CHIEF OFFICER – LEGAL AND REGULATORY SERVICES, HR AND CORPORATE POLICY
Responsible Officer:	MARK GALVIN – SENIOR DEMOCRATIC SERVICES OFFICER - COMMITTEES
Policy Framework and Procedure Rules:	There is no impact on the policy framework and procedure rules.
Executive Summary:	The report is required in order to outline the planned programme of items proposed to be considered at Cabinet, Council and Overview and Scrutiny Committee meetings in the coming months. The publishing of this report will benefit the public in terms of them being made aware of such key items of business in advance.

1. Purpose of Report

- 1.1 The purpose of this report is to seek Cabinet approval for items to be included on the Cabinet Forward Work Programme for the period 1 March 2024 to 30 June 2024 and for Cabinet to note the Council and Overview and Scrutiny Committees' Forward Work Programmes for the same period.

2. Background

- 2.1 In accordance with the Council's Constitution, the Forward Work Programme will be prepared by the Monitoring Officer to cover a period of four months except when ordinary elections of councillors occur.
- 2.2 The Forward Work Programme will contain matters which the Cabinet, Overview and Scrutiny Committees and full Council are likely to consider. It will contain information on:
 - (a) the timetable for considering the Budget and any plans, policies or strategies forming part of the Policy Framework and requiring Council approval, and which body is to consider them;
 - (b) the timetable for considering any plans, policies or strategies which are the responsibility of the Cabinet;

is known.

3. Current situation / proposal

3.1 The proposed Forward Work Programmes for the above period are appended to the report, as follows:

- Cabinet - **Appendix 1**
- Council - **Appendix 2**
- Overview and Scrutiny Committees - **Appendix 3**

3.2 Following consideration by Cabinet, the Forward Work Programmes will be published on the Council's website.

4. Equality implications (including Socio-economic Duty and Welsh Language)

4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives

5.1 The well-being goals identified in the Act were considered in the preparation of this report. It is considered that there will be no significant or unacceptable impacts upon the achievement of well-being goals/objectives as a result of this report.

6. Climate Change Implications

6.1 There are no climate change implications arising from this report.

7. Safeguarding and Corporate Parent Implications

7.1 There are no safeguarding or corporate parent implications arising from this report.

8. Financial Implications

8.1 There are no financial implications arising from this report.

9. Recommendations

Cabinet is recommended to:

- Approve the Cabinet Forward Work Programme for the period 1 March 2024 to 30 June 2024 at **Appendix 1**;
- Note the Council and Overview and Scrutiny Committees' Forward Work Programmes for the same period, as shown at **Appendix 2** and **Appendix 3** of the report, respectively.

Background documents

None.

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CABINET FORWARD WORK PROGRAMME - 1 MARCH 2024 TO 30 JUNE 2024

Date	Title of Report	Contact Officer
12 Mar	Care Inspectorate Wales (CIW) Inspection of Bridgend County Borough Council's (BCBC) Regulated Services In Adult Social Care	Claire Marchant Corporate Director Social Services and Wellbeing Tel: 01656 643241 Email: Claire.Marchant@bridgend.gov.uk
12 Mar	Welsh Public Library Standards	Claire Marchant Corporate Director Social Services and Wellbeing Tel: 01656 643241 Email: Claire.Marchant@bridgend.gov.uk
12 Mar	Schools Admissions Policy 2025-2026	Lindsay Harvey Corporate Director – Education and Family Support Tel: 01656 642612 Email: Lindsay.harvey@bridgend.gov.uk
12 Mar	Procedure for the Appointment and Removal of Local Authority Governors	Lindsay Harvey Corporate Director – Education and Family Support

Date	Title of Report	Contact Officer
		Tel: 01656 642612 Email: Lindsay.harvey@bridgend.gov.uk
12 Mar	Home to School/College Transport Policy	Lindsay Harvey Corporate Director – Education and Family Support Tel: 01656 642612 Email: Lindsay.harvey@bridgend.gov.uk
12 Mar	Appointment of LA Governors	Lindsay Harvey Corporate Director – Education and Family Support Tel: 01656 642612 Email: Lindsay.harvey@bridgend.gov.uk
12 Mar	Non-Domestic Rates: Discretionary Relief: Retail, Leisure and Hospitality Rates Relief Scheme 2024-25	Carys Lord Chief Officer – Finance Performance and Change Tel: 01656 643302 Email: Carys.Lord@bridgend.gov.uk
12 Mar	Local Housing Market Assessment 2024	Carys Lord Chief Officer – Finance Performance and Change Tel: 01656 643302 Email:

Date	Title of Report	Contact Officer
		Carys.Lord@bridgend.gov.uk
12 Mar	Housing and Homelessness Position Statement	Carys Lord Chief Officer – Finance Performance and Change Tel: 01656 643302 Email: Carys.Lord@bridgend.gov.uk
12 Mar	Outcome of the Consultation on the Draft Participation and Engagement Strategy	Carys Lord Chief Officer – Finance Performance and Change Tel: 01656 643302 Email: Carys.Lord@bridgend.gov.uk
12 Mar	Proposed Use of Land Transaction Transfer Protocol with CCR for Land at Brynmenyn & Bryncethin	Janine Nightingale Corporate Director Communities Tel: 01656 643241 Email: Janine.nightingale@bridgend.gov.uk
16 Apr	Draft Strategic Equality Plan 2024 - 2028	Carys Lord Chief Officer – Finance Performance and Change Tel: 01656 643302 Email: Carys.Lord@bridgend.gov.uk

Date	Title of Report	Contact Officer
16 Apr	Corporate Plan Delivery Plan	<p>Kelly Watson Chief Officer – Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Kelly.Watson@bridgend.gov.uk</p>
16 Apr	Appointment of LA Governors	<p>Lindsay Harvey Corporate Director – Education and Family Support Tel: 01656 642612 Email: Lindsay.harvey@bridgend.gov.uk</p>
16 Apr	Strategic Commissioning Plans	<p>Claire Marchant Corporate Director Social Services and Wellbeing Tel: 01656 643241 Email: Claire.Marchant@bridgend.gov.uk</p>
16 Apr	Healthy Living Partnership	<p>Claire Marchant Corporate Director Social Services and Wellbeing Tel: 01656 643241 Email: Claire.Marchant@bridgend.gov.uk</p>

COUNCIL FORWARD WORK PROGRAMME – 1 MARCH 2024 TO 30 JUNE 2024

Date	Title of Report	Contact Officer
13 Mar	Single Transferable Vote (STV)	Mark Shephard Chief Executive Tel: 01656 643380 Email: Mark.Shephard@bridgend.gov.uk
13 Mar	Pay Policy Statement – 2024/2025	Mark Shephard Chief Executive Tel: 01656 643380 Email: Mark.Shephard@bridgend.gov.uk
13 Mar	Elected Member Personal Safety Protocol	Kelly Watson Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: Kelly.watson@bridgend.gov.uk
13 Mar	Independent Remuneration Panel for Wales Annual Report 2024/25	Kelly Watson Chief Officer, Legal and Regulatory

Date	Title of Report	Contact Officer
		Services, HR and Corporate Policy Tel: 01656 643248 Email: Kelly.watson@bridgend.gov.uk
13 Mar	Adoption of the Replacement Local Development Plan	Janine Nightingale Corporate Director Communities Tel: 01656 643241 Email: Janine.nightingale@bridgend.gov.uk
13 Mar	Budget 2024-25	Carys Lord Chief Officer - Finance, Performance and Change Tel: 01656 643302 Email: Carys.Lord@bridgend.gov.uk
17 Apr	Corporate Plan Delivery Plan	Kelly Watson Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: Kelly.watson@bridgend.gov.uk
17 Apr	Renewal of the Regional Internal Audit Shared Service Partnership Agreement	Carys Lord Chief Officer - Finance, Performance and Change Tel: 01656 643302

Date	Title of Report	Contact Officer
		Email: Carys.Lord@bridgend.gov.uk
17 Apr	Revision of the Political Balance on Committees	Kelly Watson Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: Kelly.watson@bridgend.gov.uk
17 Apr	Disclosure and Barring Service (DBS) Policy	Kelly Watson Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: Kelly.watson@bridgend.gov.uk

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APPENDIX 3**OVERVIEW AND SCRUTINY FORWARD WORK PROGRAMME – 1 MARCH 2024 TO 30 JUNE 2024**

Date	Title of Report	Scrutiny Committee	Contact Officer
18 Mar	<ul style="list-style-type: none"> - Welsh in Education Strategic Plan (WESP) - Central South Consortium Annual report - Information report – Adult Community Learning update 	Subject Overview and Scrutiny Committee 1	Lindsay Harvey Corporate Director – Education and Family Support Tel: 01656 642612 Email: Lindsay.harvey@bridgend.gov.uk
19 Mar	<ul style="list-style-type: none"> - Future Waste Services Post 2026 	Subject Overview and Scrutiny Committee 3	Janine Nightingale Corporate Director Communities Tel: 01656 643241 Email: Janine.Nightingale@bridgend.gov.uk
21 Mar	<ul style="list-style-type: none"> - Quarter 3 Performance 2023-2024 - Corporate Plan Delivery Plan (refreshing PI targets) - Workforce Strategy Monitoring Action Plans 	Corporate Overview and Scrutiny Committee	Kelly Watson Chief Officer, Legal and Regulatory Services, HR and Corporate Policy Tel: 01656 643248 Email: Kelly.Watson@bridgend.gov.uk

Date	Title of Report	Scrutiny Committee	Contact Officer
15 April	<ul style="list-style-type: none"> - Draft Adults Strategic Plan - TBC 	Subject Overview and Scrutiny Committee 2	Claire Marchant Corporate Director Social Services & Wellbeing Tel: 01656 643248 Email: Claire.marchant@bridgend.gov.uk
22 April	<ul style="list-style-type: none"> - Caerau Minewater Project Review 	Subject Overview and Scrutiny Committee 3	Janine Nightingale Corporate Director Communities Tel: 01656 643241 Email: Janine.Nightingale@bridgend.gov.uk
June/July Date to be confirmed	<ul style="list-style-type: none"> - Outcome of the Home-to-School/College Transport Policy Public Consultation 	Subject Overview and Scrutiny Committee 1	Lindsay Harvey Corporate Director – Education and Family Support Tel: 01656 642612 Email: Lindsay.harvey@bridgend.gov.uk