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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
Gofynnwch am / Ask for: Gwasanaethau Democrataidd

Ein cyf / Our ref:
Eich cyf / Your ref:

Dyddiad/Date: Dydd Mercher, 18 Mehefin 2025

Annwyl Cynghorydd,

CYNGOR

Cynhelir Cyfarfod Cyngor Hybrid in the Council Chamber Civic Offices, Angel Street, Bridgend, CF31 4WB ar **Dydd Mercher, 25 Mehefin 2025** am **16:00**.

AGENDA

1 Ymddiheuriadau am absenoldeb

Derbyn ymddiheuriadau am absenoldeb gan Aelodau.

2 Datganiadau o fuddiant

Derbyn datganiadau o ddiddordeb personol a rhagfarnol (os o gwbl) gan Aelodau / Swyddogion yn unol â darpariaethau'r Cod Ymddygiad Aelodau a fabwysiadwyd gan y Cyngor o 1 Medi 2008.

3 Cymeradwyaeth Cofnodion — 7 - 28

I dderbyn am gymeradwyaeth y Cofnodion cyfarfod y 02/04/2025, 09/04/2025 a 14/05/2025

4 Cyflwyniad i'r Cyngor gan gynrychiolwyr Valleys To Coast (V2C) — 29 - 30

5 I dderbyn cyhoeddiadau oddi wrth:

(i) Maer (neu'r person sy'n llywyddu)
(ii) Prif Weithredwr

6 Derbyn cyhoeddiadau gan yr Arweinydd

10 Derbyn y Cwestiynau canlynol gan:

Cwestiwn gan y Cynghorydd Colin Davies i'r Aelod Cabinet Addysg a Gwasanaethau Ieuenctid

Yn gynharach eleni, rhoddodd yr aelod Cabinet dros Addysg gyhoeddiad mewn perthynas â phryderon a godwyd ynghylch troseddau cyllyll a diogelwch yn Ysgolion BCBC.

Cyhoeddodd y byddai'n sefydlu Grŵp Tasg Arbennig yn cynnwys amrywiaeth o Randdeiliaid i drafod a mynd i'r afael â'r mater hynod ddifrifol hwn.

Felly, a all yr aelod Cabinet dros Addysg roi'r wybodaeth ddiweddaraf i'r Cyngor am y cynnydd a wnaed hyd yn hyn?

11 Derbyn y Cwestiynau canlynol gan:

Cwestiwn gan y Cynghorydd Martin Williams i'r Aelod Cabinet Addysg a Gwasanaethau Ieuenctid

Yn dilyn beth a adroddwyd am ysgol St Claire's ym Mhorthcawl yn cau, pa gyswllt y mae CBSP wedi'i gael â rheolwyr yr ysgol i ganfod yr effaith/pwysau tebygol y bydd y cau yn ei roi ar ysgolion yr awdurdod hwn? Beth yw'r effaith honno a pha gefnogaeth fydd yn cael ei gynnig i ddisgyblion a rhieni yn ystod y cyfnod hynod bryderus hwn.

12 Derbyn y Cwestiynau canlynol gan:

Cwestiwn gan y Cynghorydd Tim Thomas i'r Aelod Cabinet Newid Hinsawdd a'r Amgylchedd

Ers y flwyddyn 2008, faint o Gytundebau Adran 106 sydd wedi:

1. cymryd mwy na 5 mlynedd i'w cwblhau ar ôl derbyn cais.
2. mwy na 10 mlynedd i'w cwblhau ar ôl derbyn cais.
3. parhau'n anghyflawn neu heb eu datrys ar ôl derbyn cais, dros a thu hwnt i 10 mlynedd?

13 Rhybudd o Gynnig gan y Cynghorydd Jon-Paul Blundell

Rwy'n cynnig bod y Cyngor yn nodi bod Bil Hawliau Cyflogaeth 2024 yn fil a fydd yn diweddaru ac yn cryfhau hawliau cyflogaeth yn y DU
Mae'r mesurau sy'n cael eu cyflwyno yn y bil yn cynnwys.

Gwahardd contractau dim oriau ecsbloetiol drwy gyflwyno hawliau i oriau gwarantedig.
Rhoi terfyn ar arferion diegwyddor "diswyddo ac ail-gyflogi" drwy ystyried unrhyw ddiswyddiadau am fethu â chytuno ar newid contract fel rhai annheg yn awtomatig.
Darparu hawl i amddiffyniad rhag diswyddo annheg o'r diwrnod cyntaf.
Sicrhau hawl i absenoldeb tadolaeth o ddiwrnod cyntaf cyflogaeth.
Cyflwyno hawl newydd i absenoldeb profedigaeth di-dâl sy'n caniatáu i weithwyr gymryd o absenoldeb o'r gwaith i alaru am golli anwylyd.
Cryfhau dyletswydd cyflogwyr i atal aflonyddu rhywiol ar eu gweithwyr drwy ei gwneud yn ofynnol iddynt gymryd pob cam ataliol rhesymol
Gwella mynediad at dâl salwch statudol drwy gael gwared ar y terfyn enillion is a chael gwared ar y cyfnod aros o dri diwrnod.
Nid yw'r rhestr uchod yn gynhwysfawr, ac mae'r bil yn cynnwys llu o fesurau a gynlluniwyd i gynyddu cynhyrchiant, codi safonau byw a chreu cyfleoedd i bawb..

Mae'r cyngor hwn yn credu:
Bod y mesurau sydd wedi'u cynnwys yn y bil yn cynrychioli'r uwchraddiad mwyaf mewn hawliau cyflogaeth mewn cenhedlaeth ac, unwaith y bydd y bil wedi'i basio, y bydd bywydau gwaith a theuluol
trigolion Pen-y-bont ar Ogwr yn cael eu gwella'n sylweddol

Mae'r cyngor hwn yn penderfynu:
Ysgrifennu at lywodraeth y DU ar ran trigolion Pen-y-bont ar Ogwr yn cefnogi'r mesurau sydd wedi'u cynnwys yn y bil.

14 Rhybudd o Gynnig gan y Cynghorydd Martin Williams

Mae'r cyngor hwn yn cydnabod yr heriau rydym yn eu hwynebu wrth recriwtio gweithredwyr i dorri glaswellt, yn dilyn y penderfyniad i ddod â'r gwasanaeth yn fewnol, a'r effaith y mae'n ei chael ar ein cymunedau.

O dan ethos Un Cyngor o gydweithio, rydym felly'n penderfynu gofyn i'r cabinet ystyried cysylltu â phob cyngor tref a chymuned cyn gynted â phosibl a chynnig eu talu i gyflawni'r gwasanaeth yn eu hardaloedd fel mesur dros dro, os ydynt yn fodlon ac yn gallu.

15 Materion Brys

I ystyried unrhyw eitemau o fusnes y, oherwydd amgylchiadau arbennig y cadeirydd o'r farn y dylid eu hystyried yn y cyfarfod fel mater o frys yn unol â Rhan 4 (pharagraff 4) o'r Rheolau Trefn y Cyngor yn y Cyfansoddiad.

16 Gwahardd y Cyhoedd

Nid yw'r adroddiad sy'n ymwneud â'r eitem ganlynol i'w gyhoeddi gan ei fod yn cynnwys gwy bodaeth eithriedig fel y'i diffinnir ym Mharagraffau 12 a 13 o Ran 4 a Pharagraff 21 o Ran 5 o Atodlen 12A i Ddeddf Llywodraeth Leol 1972 fel y'i diwygiwyd gan Orchymyn Llywodraeth Leol (Mynediad at Wybodaeth) (Amrywio) (Cymru) 2007.

Os bydd y
Panel, yn dilyn cymhwyso prawf budd y cyhoedd, yn penderfynu yn unol â'r Ddeddf i ystyried yr eitem hon yn breifat, bydd y cyhoedd yn cael eu gwahardd o'r cyfarfod yn ystod ystyriaeth o'r fath.

17 Cymeradwyaeth Cofnodion wedi'u Eithrio

153 - 154

Nodyn: Bydd hwn yn gyfarfod Hybrid a bydd Aelodau a Swyddogion mynychu trwy Siambr y Cyngor, Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont ar Ogwr / o bell Trwy Timau Microsoft. Bydd y cyfarfod cael ei recordio i'w drosglwyddo drwy wefan y Cyngor. Os oes gennych unrhyw gwestiwn am hyn, cysylltwch â cabinet_committee@bridgend.gov.uk neu ffoniwch 01656 643148 / 643694 / 643513 / 643159

Yn ddiffuant
K Watson
Prif Swyddog, Gwasanaethau Cyfreithiol a Rheoleiddio, AD a Pholisi Corfforaethol

Dosbarthiad:

Cynghorwr:
S Aspey
H T Bennett
A R Berrow
F D Bletsoe
S J Bletsoe
JPD Blundell
E L P Caparros
N Clarke
Clatworthy
RJ Collins
HJ David
C Davies
C L C Davies
P Davies
S Easterbrook
M J Evans
N Farr
P Ford
J Gebbie
W R Goode
RM Granville
H Griffiths
S J Griffiths
GH Haines
D T Harrison
M L Hughes
D M Hughes
RM James
P W Jenkins
M R John
M Jones
W J Kendall
M Lewis
J Llewellyn-Hopkins
RL Penhale-Thomas
J E Pratt
R J Smith
JC Spanswick

I M Spiller
T Thomas
JH Tildesley MBE
A Ulberini-Williams
G Walter
A Wathan
AJ Williams
HM Williams
I Williams
MJ Williams
R Williams
E D Winstanley
T Wood

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COFNOD O BENDERFYNIAD CYFARFOD O'R CYNGOR A GYNHALIWYD HYBRID IN THE COUNCIL CHAMBER CIVIC OFFICES, ANGEL STREET, BRIDGEND, CF31 4WB AR DYDD MERCHER, 2 EBRILL 2025 14:30

Presennol

Cynghorydd H Griffiths – Maer a Chadeirydd

A R Berrow	JPD Blundell	N Clarke	HJ David
C Davies	P Davies	S Easterbrook	M J Evans
N Farr	W R Goode	RM Granville	GH Haines
D M Hughes	P W Jenkins	M Jones	RL Penhale-Thomas
J E Pratt	JC Spanswick	T Thomas	JH Tildesley MBE
A Ulberini-Williams	A Wathan	AJ Williams	I Williams
MJ Williams	T Wood		

Presennol Rhithwir

H T Bennett	S J Bletsoe	E L P Caparros	RJ Collins
J Gebbie	S J Griffiths	D T Harrison	M L Hughes
M R John	W J Kendall	J Llewellyn-Hopkins	I M Spiller
G Walter	HM Williams	E D Winstanley	

Swyddogion:

Rachel Keepins	Rheolwr Gwasanaethau Democrataidd
Paul Miles	Rheolwr Grŵp - Adnoddau Dynol a Datblygu Sefydliadol
Michael Pitman	Swyddog Cymorth Technegol – Gwasanaethau Democrataidd
Oscar Roberts	Prentis Gweinyddol Busnes - Gwasanaethau Democrataidd
Kelly Watson	Prif Swyddog - Cyfreithiol a Rheoleiddiol, AD a Pholisi Corfforaethol
Mark Shephard	Prif Weithredwr
Amy Billington	Solace mewn Busnes

124. Ymddiheuriadau am absenoldeb

Penderfyniad a Wnaed	Derbyniwyd ymddiheuriadau am absenoldeb gan y Cynghorwyr F D Bletsoe, C L C Davies, RM James ac R J Smith
Dyddiad y Gwnaed y Penderfyniad	2 Ebrill 2025

125. Datganiadau o Fuddiant

Penderfyniad a Wnaed	Datganodd y Cynghorydd H Bennett fuddiant rhagfarnllyd yn eitem 4 ar yr Agenda, oherwydd ei bod eisoes wedi cymryd rhan yn y Panel Rhanddeiliaid ar ran y Trydydd Sector, mewn perthynas â'r eitem hon. Gadawodd y Cynghorydd Bennett y cyfarfod tra bod yr eitem yn cael ei hystyried.
Dyddiad y Gwnaed y Penderfyniad	2 Ebrill 2025

126. Gwahardd y Cyhoedd

Penderfyniad a Wnaed	PENDERFYNWYD: Ni ddylid cyhoeddi'r adroddiad sy'n ymwneud â'r eitem ganlynol gan ei fod yn cynnwys gwybodaeth eithriedig fel y'i diffinnir ym Mharagraffau 12 a 13 o Ran 4 a Pharagraff 21 o Ran 5 o Atodlen 12A o Ddeddf Llywodraeth Leol 1972 fel y'i diwygiwyd gan Orchymyn Llywodraeth Leol (Mynediad at Wybodaeth) (Amrywiad) (Cymru) 2007. Yn dilyn cymhwyso prawf budd y cyhoedd, penderfynodd y Cyngor yn unol â'r Ddeddf ystyried yr eitem hon yn breifat, felly cafodd y cyhoedd eu heithrio o'r cyfarfod yn ystod yr ystyriaeth honno..
Dyddiad y Gwnaed y Penderfyniad	2 Ebrill 2025

127. Proses Benodi: Prif Weithredwr

Penderfyniad a Wnaed	Gan fod cynnwys yr eitem hon wedi'i eithrio, nid yw manylion y cofnod i'w cyhoeddi yn rhinwedd Cofnod 126 uchod.
Dyddiad y Gwnaed y Penderfyniad	2 Ebrill 2025

I arsylwi dadl bellach a gynhaliwyd ar yr eitemau uchod, cliciwch ar y ddolen hon

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COFNOD O BENDERFYNIAD CYFARFOD O'R CYNGOR A GYNHALIWYD HYBRID IN THE COUNCIL CHAMBER CIVIC OFFICES, ANGEL STREET, BRIDGEND, CF31 4WB AR DYDD MERCHER, 9 EBRILL 2025 16:00

Yn Bresennol

Y Cynghorydd H Griffiths – Cadeirydd

H T Bennett	A R Berrow	JPD Blundell	E L P Caparros
RJ Collins	HJ David	C Davies	P Davies
S Easterbrook	M J Evans	N Farr	J Gebbie
RM Granville	GH Haines	M L Hughes	D M Hughes
M Jones	W J Kendall	J E Pratt	I M Spiller
T Thomas	JH Tildesley MBE	A Ulberini-Williams	A Wathan
I Williams	E D Winstanley	T Wood	

Yn Bresennol yn Rhithwir

S Aspey	F D Bletsoe	S J Bletsoe	N Clarke
C L C Davies	P Ford	W R Goode	S J Griffiths
D T Harrison	RM James	M R John	J Llewellyn-Hopkins
RL Penhale-Thomas	R J Smith	JC Spanswick	G Walter
AJ Williams	HM Williams	MJ Williams	

Ymddiheuriadau am Absenoldeb

P W Jenkins, M Lewis R Williams a Janine Nightingale, Cyfarwyddwr Corfforaethol – Cymunedau

Swyddogion:

Mark Galvin	Uwch-swyddog Gwasanaethau Democrataidd – Pwyllgorau
Lindsay Harvey	Cyfarwyddwr Corfforaethol – Addysg, Blynyddoedd Cynnar a Phobl Ifanc
Rachel Keepins	Rheolwr Gwasanaethau Democrataidd
Carys Lord	Prif Swyddog – Cyllid, Tai a Newid

Claire Marchant	Cyfarwyddwr Corfforaethol – Gwasanaethau Cymdeithasol a Llesiant
Michael Pitman	Swyddog Cymorth Technegol – Gwasanaethau Democrataidd
Alex Rawlin	Rheolwr Polisi Corfforaethol a Pherfformiad
Mark Shephard	Prif Weithredwr
Kelly Watson	Prif Swyddog – Gwasanaethau Cyfreithiol a Rheoliadol, Adnoddau Dynol a Pholisi Corfforaethol
Zak Shell	Pennaeth Gweithrediadau – Gwasanaethau Cymunedol
Oscar Roberts	Prentys Busnes Gweinyddol – Gwasanaethau Democrataidd

Datganiadau o Fuddiant
Y Cyngh. E Winstanley – Personol – Eitem 6, gan ei bod yn ymwneud drwy ei gwaith â sawl prosiect a restrir o dan Amcan 1 yn yr adroddiad hwnnw.

130. Cymeradwyo Cofnodion

Y Penderfyniad a Wnaed	PENDERFYNWYD: Y caiff cofnodion cyfarfodydd y Cyngor ar 26 Chwefror 2025 a 12 Mawrth 2025 eu cymeradwyo fel cofnodion gwir a chywir.
Dyddiad Gwneud y Penderfyniad	9 Ebrill 2025

131. Derbyn cyhoeddiadau gan:

Y Penderfyniad a Wnaed	Derbyniwyd cyhoeddiadau gan yr Aelodau Cabinet canlynol a'r Prif Weithredwr (dim penderfyniadau yn ofynnol/wedi'u gwneud):- • Y Maer;

	• Y Dirprwy Arweinydd a'r Aelod Cabinet dros Wasanaethau Cymdeithasol ac Iechyd; • Y Prif Weithredwr
Dyddiad Gwneud y Penderfyniad	9 Ebrill 2025

132. Derbyn cyhoeddiadau gan yr Arweinydd

Y Penderfyniad a Wnaed	Derbyniwyd cyhoeddiadau gan yr Arweinydd (dim penderfyniadau yn ofynnol/wedi'u gwneud).
Dyddiad Gwneud y Penderfyniad	9 Ebrill 2025

133. Adolygiad o'r Cynllun Corfforaethol ar gyfer 2025/26

Y Penderfyniad a Wnaed	Diben yr adroddiad hwn, a gyflwynwyd gan y Rheolwr Polisi Corfforaethol a Pherfformiad, oedd amlinellu fersiwn wedi'i diweddaru o Gynllun Cyflawni'r Cynllun Corfforaethol ar gyfer 2025/26 i'r Cyngor ei chymeradwyo. Cafwyd cwestiwn gan Gynghorwyr am amseriad yr adroddiad o ystyried newidiadau posibl i lefelau staffio. Cafwyd ymateb i'r cwestiwn hwn gan y Rheolwr Polisi Corfforaethol a Pherfformiad a'r Dirprwy Arweinydd – Aelod Cabinet dros Wasanaethau Cymdeithasol, Iechyd a Llesiant. PENDERFYNWYD: Bod y Cyngor: • Yn cymeradwyo Cynllun Cyflawni'r Cynllun Corfforaethol ar gyfer 2025/26 yn Atodiad 1; • Yn cymeradwyo'r targedau dangosyddion perfformiad ar gyfer 2025/26 yn Atodiad 2.

	Diolchodd y Cyngor ymhellach i'r Rheolwr Polisi Corfforaethol a Pherfformiad a'i dîm am eu gwaith ar yr adroddiad.
Dyddiad Gwneud y Penderfyniad	9 Ebrill 2025

134. Adolygiad Craffu

Y Penderfyniad a Wnaed	Diben yr adroddiad hwn, a gyflwynwyd gan y Prif Swyddog – Gwasanaethau Cyfreithiol a Rheoliadol, Adnoddau Dynol a Pholisi Corfforaethol, oedd rhoi'r wybodaeth ddiweddaraf i'r Cyngor am waith yn dilyn argymhellion a wnaed gan Archwilio Cymru mewn adroddiad ar drefniadau gwneud penderfyniadau'r Cyngor a gyhoeddwyd ym mis Hydref 2024, er mwyn rhoi cyfle i'r aelodau ystyried trefniadau craffu newydd, a gofyn i'r Cyngor gymeradwyo'r Protocol Craffu yn dilyn Adolygiad Craffu a gynhaliwyd yn 2024. Awgrymwyd y dylid dileu'r awgrym ynghylch swydd cadeirydd taledig ychwanegol a amlinellir yn yr argymhellion, ond roedd rhai aelodau'n anghytuno gan y byddai'r penderfyniad hwn yn arwain at wanhau'r taliadau cyflog presennol ymhlith grwpiau gwleidyddol. Rhannodd aelodau bryderon ynglŷn ag argymhellion Swyddfa Archwilio Cymru i ymestyn Blaenraglenni Gwaith Craffu chwe mis i'r dyfodol, gan gyfeirio at ansicrwydd ynghylch amserlennu eitemau i gyfarfodydd yn y dyfodol ac unrhyw anghywirdebau posibl y gallai hyn eu hachosi. Cafwyd cwestiynau gan Gynghorwyr am y canlynol: • Edrych ar arferion cynghorau eraill ar gyfer Blaenraglenni Gwaith, fel ymarfer meincnodi. • Hefyd, ystyried lleihau terfynau amser ar gyfer cyfarfodydd Trosolwg a Chraffu, yn amodol ar gytundeb y Cadeirydd. • Y rôl a fydd gan Gynghorwyr nad ydynt mewn grwpiau gwleidyddol ar y pwyllgorau craffu newydd arfaethedig. • Pryd y byddai'r newidiadau a awgrymir neu a argymhellir yn yr adroddiad neu yn ystod y drafodaeth

yn debygol o gael eu gwneud.
- Y broses ar gyfer galw i mewn i Bwyllgorau Craffu a pherchnogaeth yr achosion hyn o alw i mewn ymhlith Pwyllgorau Craffu.

Cafwyd ymateb i'r cwestiynau hyn gan y Rheolwr Gwasanaethau Democrataidd, y Prif Swyddog – Gwasanaethau Cyfreithiol a Rheoliadol, Adnoddau Dynol a Pholisi Corfforaethol, ac Arweinydd y Cyngor.

Cadarnhaodd yr Arweinydd, pe bai unrhyw Gadeirydd ychwanegol yn cael tâl yn dilyn yr Adolygiad Craffu, yna gan nad oedd cyllideb ychwanegol ar gyfer hyn, y byddai unrhyw ailddyraniad o lwfansau cyflogau uwch yn deillio o'r hyn sydd wedi'i ddyrannu ar hyn o bryd i Gadeiryddion Pwyllgorau fel rhan o lwfansau uwch sydd wedi'u dyrannu, gydag unrhyw addasiadau'n adlewyrchu llwyth gwaith sy'n gysylltiedig â'r pwyllgor penodol hwnnw ochr yn ochr ag unrhyw ffactorau eraill posibl.

Cafwyd pleidlais ar argymhelliad 3 yr adroddiad, ac roedd y canlyniad fel a ganlyn:-

O blaid	Yn erbyn
26	20

Cytunodd yr aelodau i ailenwi'r Pwyllgorau Trosolwg a Chraffu Pwnc er mwyn adlewyrchu'r Cyfarwyddiaethau a gefnogir ganddynt yn well. Roedd yr aelodau'n unfrydol o'r farn na ddylai Cadeirydd y Pwyllgor Trosolwg a Chraffu Corfforaethol fod yn aelod o grŵp mwyafrifol y Cyngor. Ar y cyfan, roedd yr aelodau'n cytuno na ddylai'r un cyfarfod pwyllgor bara mwy na thair awr, ond ychwanegwyd mai Cadeiryddion y pwyllgorau fyddai'n gwneud penderfyniadau ynglŷn â hyn, fel yr aelodau sy'n llywyddu'r cyfarfodydd.

PENDERFYNWYD: Bod y Cyngor:
- Yn nodi'r cynnydd a oedd wedi'i wneud mewn perthynas ag argymhellion Archwilio Cymru fel rhan o'i ‘Adolygiad o Drefniadau Gwneud Penderfyniadau’ ym Mhen-y-bont ar Ogwr;
- Yn nodi'r opsiynau strwythur a gyflwynwyd yn yr adroddiad hwn ac argymhellion y Pwyllgor Trosolwg a Chraffu Corfforaethol ac yn cymeradwyo opsiwn 2 fel y strwythur craffu y cytunir arno, i'w roi ar waith yn dilyn Cyfarfod Blynyddol y Cyngor ar 14 Mai 2025;
- Wedi penderfynu bod angen Cadeirydd taledig ychwanegol ac wedi cytuno mewn egwyddor cyn i benderfyniad terfynol gael ei wneud yn y Cyfarfod Cyffredinol Blynyddol, yn dilyn newidiadau angenrheidiol i'r Rhestr Cydnabyddiaeth Ariannol, gan nodi y telir am hyn o'r gyllideb bresennol ar

	gyfer Aelodau, a fydd yn arwain at gael gwared ar lwfansau cyflog uwch eraill; • Yn cymeradwyo newid i aelodaeth pob Is-bwyllgor Trosolwg a Chraffu i 14 o Aelodau, i ddod i rym fel rhan o'r strwythur craffu y cytunwyd arno; • Yn cymeradwyo'r Protocol Craffu, a oedd wedi'i gynnwys yn Atodiad 2, i gael ei ddosbarthu wedyn a'i lofnodi gan yr holl Aelodau Craffu, y Bwrdd Gweithredol a'r Bwrdd Rheoli Corfforaethol; • Yn nodi y caiff adroddiad ei gyflwyno i'r Cyfarfod Cyffredinol Blynyddol yn ceisio cymeradwyaeth i ddiwygio'r Cyfansoddiad i ymgorffori'r Cylch Gorchwyl, yr Aelodaeth a'r Rheolau Gweithdrefnau Trosolwg a Chraffu diwygiedig o ganlyniad i'r strwythur diwygiedig, gan nodi y bydd y Pwyllgor Trosolwg a Chraffu Corfforaethol yn arwain ar Graffu Cyllidebol o hyn ymlaen. Hefyd, diolchodd y Cyngor i'r Swyddogion am eu cyfraniadau at baratoi'r adroddiad a llunio'r opsiynau i'r Cyngor eu hystyried, ac i'r tîm Trosolwg a Chraffu am eu gwaith yn y cyfarfodydd a gefnogir ganddynt.
Dyddiad Gwneud y Penderfyniad	9 Ebrill 2025

135. Hysbysiad o Gynnig a wneir gan

Y Penderfyniad a Wnaed	Amlinellodd y Cynghorydd Ian Williams ei Hysbysiad o Gynnig, a oedd wedi'i eirio yn unol â'r hyn a oedd ar agenda'r cyfarfod. Cafwyd cwestiwn gan Gynghorwyr ynghylch a oedd y Cyngh. Williams wedi cyfeirio at ymrwymo i ddatganiad Llywodraeth Cymru. Cafwyd ymateb i'r cwestiwn hwn gan yr aelod. <u>PENDERFYNWYD:</u> Gwnaeth yr Aelodau drafod y cynnig, a chafodd ei gynnig a'i eilio yn dilyn newid i ychwanegu paragraff pellach: Mae'r Cyngor yn cydnabod sylwadau diweddar yr Archwilydd Cyffredinol ynglŷn â chyfyngiadau'r dulliau presennol o fynd i'r afael â'r dirywiad mewn bioamrywiaeth a bwriad Llywodraeth Cymru i newid cyfraith amgylcheddol er mwyn blaenoriaethu camau gweithredu ar fioamrywiaeth. Yn unol â hynny, mae'r Cyngor yn ymrwymo i weithio'n rhagweithiol gyda Llywodraeth Cymru i gyrraedd targedau newydd ar gyfer diogelu

	ac adfer bioamrywiaeth, a disgwylir i hynny gael ei gynnwys mewn deddfwriaeth amgylcheddol newydd er mwyn i ni allu mynd i'r afael â'r Argyfwng Hinsawdd sy'n mynd rhagddo, a gafodd ei ddatgan gan y Senedd yn 2021.
Dyddiad Gwneud y Penderfyniad	9 Ebrill 2025

136. Eitemau Brys

Y Penderfyniad a Wnaed	Dim.
Dyddiad Gwneud y Penderfyniad	9 Ebrill 2025

I arsylwi dadl bellach a gynhaliwyd ar yr eitemau uchod, cliciwch ar y ddolen hon

Terfynwyd y cyfarfod yn 17:30

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COFNOD O BENDERFYNIAD CYFARFOD O'R CYNGOR A GYNHALIWYD HYBRID IN THE COUNCIL CHAMBER CIVIC OFFICES, ANGEL STREET, BRIDGEND, CF31 4WB AR DYDD MERCHER, 14 MAI 2025 16:00

Presennol

Y Cynghorydd H Griffiths – Cadeirydd

H T Bennett	A R Berrow	F D Bletsoe	S J Bletsoe
JPD Blundell	E L P Caparros	N Clarke	Clatworthy
HJ David	P Davies	S Easterbrook	M J Evans
N Farr	J Gebbie	GH Haines	M L Hughes
D M Hughes	M R John	M Jones	RL Penhale-Thomas
J E Pratt	R J Smith	JC Spanswick	I M Spiller
JH Tildesley MBE	A Ulberini-Williams	G Walter	A Wathan
AJ Williams	I Williams	MJ Williams	

Presennol – O Bell

S Aspey	RJ Collins	C Davies	P Ford
RM Granville	S J Griffiths	D T Harrison	RM James
W J Kendall	M Lewis	J Llewellyn-Hopkins	T Thomas
HM Williams	R Williams	E D Winstanley	

Ymddiheuriadau am Absenoldeb

C L C Davies, W R Goode, P W Jenkins a/ac T Wood

Swyddogion:

Laura Griffiths	Rheolwr Grŵp Cyfreithiol a Gwasanaethau Democrataidd
Lindsay Harvey	Cyfarwyddwr Corfforaethol – Addysg a Chymorth i Deuluoedd
Rachel Keepins	Rheolwr Gwasanaethau Democrataidd
Carys Lord	Prif Swyddog - Cyllid, Perfformiad a Newid

Claire Marchant	Cyfarwyddwr Corfforaethol - Gwasanaethau Cymdeithasol a Lles
Michael Pitman	Swyddog Gwasanaethau Democrataidd – Pwyllgorau
Alex Rawlin	Rheolwr Polisi Corfforaethol a Materion Cyhoeddus
Anya Richards	Rheolwr Grŵp - Cyfathrebu a Materion Cyhoeddus
Oscar Roberts	Prentis Gweinyddol Busnes - Gwasanaethau Democrataidd
Mark Shephard	Prif Weithredwr
Kelly Watson	Prif Swyddog – Gwasanaethau Cyfreithiol, Adnoddau Dynol a Rheoleiddio

Datganiadau o Ddiddordeb

Datgan Buddiannau
Datganodd y Cynghorydd Steven Bletsoe fuddiant personol mewn Penodi Cadeiryddion i Bwyllgorau

137. I dderbyn cyhoeddiadau gan y Maer, y Cynghorydd Heather Griffiths

Penderfyniad a Wnaed	Rhoddodd y Maer araith wrth adael ei swydd yn diolch i bawb a'i chefnogodd gydol ei thymor. Rhoddodd yr Arweinwyr grŵp eu diolch i'r Maer gan ei chanmol am y rhan ragweithiol a chwaraeodd yn swydd y maer yn 2024-2025.
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

138. Ethol y Maer am y cyfnod hyd at fis Mai 2026 yn unol ag Adran 23(1) Deddf Llywodraeth Leol 1972

Penderfyniad a Wnaed	PENDERFYNWYD: Bod y Cynghorydd Huw David yn cael ei ethol yn Faer am y flwyddyn i ddod, hyd at fis Mai 2026
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

139. Ethol y Dirprwy Faer am y cyfnod hyd at fis Mai 2026 yn unol ag Adran 24(1) Deddf Llywodraeth Leol 1972

Penderfyniad a Wnaed	Cafwyd dau enwebiad ar gyfer Dirprwy Faer Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr, sef y Cynghorydd Heidi Bennett a'r Cynghorydd Norah Clarke Cynhaliwyd pleidlais gyda'r canlyniadau fel a ganlyn: Y Cyng. Heidi Bennett - 28 Y Cynghorydd Norah Clarke – 17 PENDERFYNWYD: Bod y Cynghorydd Heidi Bennett yn cael ei hethol yn Ddirprwy Faer am y flwyddyn i ddod, hyd at fis Mai 2026
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

140. Ethol Arweinydd Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr

Penderfyniad a Wnaed	Cafwyd dau enwebiad ar gyfer Arweinydd Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr ar gyfer y flwyddyn i ddod 2025-26, sef y Cynghorydd JC Spanswick a'r Cynghorydd R Penhale-Thomas. Cynhaliwyd pleidlais felly i ethol yr Arweinydd, ac roedd y canlyniad oedd fel a ganlyn:- Y Cynghorydd John Spanswick - 28 Y Cynghorydd Ross Penhale Thomas – 17 PENDERFYNWYD: Bod y Cynghorydd John Spanswick yn cael ei ethol yn Arweinydd Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr am y flwyddyn i ddod, hyd at fis Mai 2026

Dyddiad Gwneud y Penderfyniad	14 Mai 2025

141. Yr Arweinydd i hysbysu'r Cyngor o'r Aelodau sydd i'w penodi i'r Cabinet gan gynnwys y Dirprwy Arweinydd a phortffolios Aelodau'r Cabinet

Penderfyniad a Wnaed	Dwedodd yr Arweinydd y byddai ei Gabinet yn cynnwys yr Aelodau canlynol i gymryd y portffolios fel y nodwyd:- Y Cynghorydd J Gebbie - Dirprwy Arweinydd ac Aelod Cabinet dros y Gwasanaethau Cymdeithasol, Iechyd a Lles Y Cynghorydd Paul Davies - Aelod Cabinet dros Newid Hinsawdd a'r Amgylchedd Y Cynghorydd Martyn Jones - Aelod Cabinet dros Addysg a'r Gwasanaethau Ieuenctid Y Cynghorydd N Farr - Aelod Cabinet dros Adfywio, Datblygu Economaidd a Thai Y Cynghorydd Hywel Williams - Aelod Cabinet dros Gyllid a Pherfformiad Y Cynghorydd M Evans a'r Cynghorydd E Caparros (rôl ar y cyd) – Aelod Cabinet Adnoddau
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

142. Penodiadau i Bwyllgorau'r Cyngor a Chyrff Eraill y Cyngor

Penderfyniad a Wnaed	**Panel Apeliadau** Cafwyd dau enwebiad ar gyfer Cadeirydd y Panel Apeliadau, yn ogystal â dau enwebiad ar gyfer Is-gadeirydd

	Roedd canlyniadau'r bleidlais fel a ganlyn: Cadeirydd Y Cynghorydd Heidi Bennett - 26 Y Cynghorydd Alan Wathan – 20 Is-Gadeirydd Y Cynghorydd William Kendall - 25 Y Cynghorydd Alan Wathan – 20 • Cadeirydd: Y Cynghorydd Heidi Bennett • Is-Gadeirydd: Y Cynghorydd William Kendall **Pwyllgor Gwasanaethau Democrataidd** • Cadeirydd: Y Cynghorydd T Thomas **Rheoli Datblygu** Cafwyd dau enwebiad ar gyfer Cadeirydd y Pwyllgor Rheoli Datblygu, yn ogystal â dau enwebiad ar gyfer Is-gadeirydd Roedd canlyniadau'r bleidlais fel a ganlyn: Cadeirydd Y Cynghorydd Richard Granville – 29 Y Cynghorydd Della Hughes – 17 Is-Gadeirydd Y Cynghorydd Simon Griffiths - 27 Y Cynghorydd Della Hughes – 19

	• Cadeirydd: Y Cynghorydd Richard Granville • Is-Gadeirydd: Y Cynghorydd Simon Griffiths **Pwyllgor Trwyddedu a'r Ddeddf Drwyddedu** • Cadeirydd: Y Cynghorydd Maxine Lewis • Is-Gadeirydd: Y Cynghorydd Richard Williams **Fforwm Cynghorau Tref a Chymuned** • Cadeirydd Yr Arweinydd • Is-Gadeirydd: Y Dirprwy Arweinydd **Pwyllgor Trosolwg Corfforaethol a Chraffu** • Cadeirydd: Y Cynghorydd Alex Alberini Williams **Pwyllgor Trosolwg a Chraffu Gwasanaethau Cymdeithasol, Iechyd a Lles** • Cadeirydd: Y Cynghorydd Freya Bletsoe **Pwyllgor Trosolwg a Chraffu Cymunedau, yr Amgylchedd a Thai** • Cadeirydd: Y Cynghorydd JP Blundell **Pwyllgor Trosolwg a Chraffu Addysg a Gwasanaethau Ieuenctid** • Cadeirydd: Y Cynghorydd Heather Griffiths
Dyddiad Gwneud y	14 Mai 2025

Penderfyniad	

143. Rhaglen Arfaethedig Cyfarfodydd y Cyngor a Phwyllgorau'r Cyngor

Penderfyniad a Wnaed	Cyflwynodd y Swyddog Monitro adroddiad yn amlinellu'r amserlen arfaethedig ar gyfer cyfarfodydd cyngor a phwyllgorau ar gyfer Mai 2025 i Ebrill 2026. Dwedodd fod cyfarfodydd y Gyllideb ym mis Chwefror 2026 yn destun newid ac roedd hyn yn dibynnu ar amserlen gyhoeddi setliad Llywodraeth Cymru. Roedd manylion pellach am gyfarfodydd eraill ar gael yn Atodiad 1 yr adroddiad. Gwnaed cynnig i symud cyfarfod y Fforwm Cynghorau Tref a Chymuned, a drefnwyd yn wreiddiol ar gyfer 18 Awst 2025 oherwydd gwyliau ac argaeledd yr Aelodau. Cytunwyd ar hyn yn unfrydol a byddai dyddiad newydd yn cael ei gynnig maes o law. Cynigiodd y Cynghorydd Martin Williams welliant er mwyn cynnwys cyfarfod llawn o'r Cyngor fis Rhagfyr gan ei fod wedi credu y byddai busnes perthnasol i'w drafod tan y Nadolig. Dwedodd y Swyddog Monitro nad oedd cyfarfod y Cyngor wedi cael ei gynnal ym mis Rhagfyr yn ystod y blynyddoedd diwethaf gydag ond ychydig o fusnes neu ddim i'w drafod, a chanfuwyd bod cyfarfod y Cyngor ym mis Ionawr yn foddhaol i drafod busnes. Dwedodd y gallai unrhyw fusnes brys a oedd angen ei gynnal yn dal i allu cael ei gynnal fis Rhagfyr, ond mater i'r Aelodau os oeddent yn dymuno cynnal cyfarfod arferol. Cynhaliwyd pleidlais yn dilyn y cynnig hwn ac fe'i gwrthodwyd yn y pen draw.
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

144. Cynrychiolaeth ar Gyrff Allanol a Phwyllgorau Eraill

Penderfyniad a Wnaed	Cyflwynodd y Swyddog Monitro adroddiad a oedd yn gofyn am gymeradwyaeth y Cyngor ar gyfer penodi Aelodau i Gyd-bwyllgor Corfforaethol De-ddwyrain Cymru – Cydbwyllgor Craffu a Throsolwg, Panel Heddlu a Throseddu De Cymru, Grŵp Cynllunio Strategol De-ddwyrain Cymru a Chyd-bwyllgor Corfforaethol De-ddwyrain Cymru a'r Is-bwyllgor Llywodraethiant ac Archwilio, fel y nodir yn yr adroddiad yn Atodiad 1, ar

	gyfer y flwyddyn i ddod, hyd at fis Mai 2026. Roedd y penodiadau fel a ganlyn: **Y Cynghorydd Simon Griffiths** a enwebwyd yn Gadeirydd pwyllgor trosolwg a chraffu Cyd-bwyllgor Corfforaethol De-ddwyrain Cymru **Y Cynghorydd Jon Paul Blundell** a enwbwyd yn Is-gadeirydd pwyllgor trosolwg a chraffu Cyd-bwyllgor Corfforaethol De-ddwyrain Cymru **Y Cynghorydd Simon Griffiths** a enwebwyd fel cynrychiolydd Is-bwyllgor Llywodraethiant ac Archwilio Cyd-bwyllgor Corfforaethol De-ddwyrain Cymru **Y Cynghorydd Simon Griffiths** a enwebwyd fel cynrychiolydd Is-bwyllgor Safonau Cyd-bwyllgor Corfforaethol De-ddwyrain Cymru **Y Cynghorydd Joanna Hopkins** a enwebwyd fel cynrychiolydd ar gyfer Panel Heddlu a Throseddu De Cymru **Y Cynghorydd Richard Granville** a enwebyd fel cynrychiolydd grŵp cynllunio strategol De-ddwyrain Cymru
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

145. Urddo Maer Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr ar gyfer 2025/2026

Penderfyniad a Wnaed	Wedi i'r Cyngor gymeradwyo enwebiad y Cynghorydd Huw David fel Maer Bwrdeistref Sirol Pen-y-bont ar Ogwr ar gyfer y flwyddyn 2025/2026, gwahoddwyd y Cynghorydd David gan y Maer a oedd yn gadael, i dderbyn Swydd y Maer yn ffurfiol. Derbyniodd y Cynghorydd Huw David swydd y Maer ar lafar ac adroddodd y llw canlynol:– "I Huw David do

	swear that I will be faithful and bear true allegiance to His Majesty the King, Charles the Third." Estynnodd y Cynghorydd Heather Griffiths ei llongyfarchiadau i'r Maer newydd. Cyhoeddodd y Cynghorydd Griffiths hefyd y byddai'r Maer Ieuenctid presennol, Ellie O'Connell a'r Dirprwy Faer Ieuenctid, Daisy Davies yn aros yn eu priod swyddi am flwyddyn arall.
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

146. I urddo Consort y Maer

Penderfyniad a Wnaed	Cyhoeddodd y Cynghorydd Huw David na fyddai ganddo gydwedd.
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

147. Urddo Dirprwy Faer Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr ar gyfer 2025/2026

Penderfyniad a Wnaed	Derbyniodd y Cynghorydd Heidi Bennett y swydd yn ffurfiol a diolchodd i bawb am eu cefnogaeth. Adleisiodd eiriau cynnes y Cynghorydd Huw David wrth gydnabod cyfraniad y Maer a oedd yn gadael.
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

148. Urddo Consort y Dirprwy Faer

Penderfyniad a Wnaed	Cyhoeddodd y Cynghorydd Heidi Bennett mai ei gŵr, David Bennett fyddai ei chonsort.
Dyddiad Gwneud y Penderfyniad	14 Mai 2025

I wylio trafodaeth bellach a gynhaliwyd ar yr eitemau uchod, cliciwch ar y ddolen hon

Daeth y cyfarfod i ben am 17:40

Meeting of:	**COUNCIL**
Date of Meeting:	**25 JUNE 2025**
Report Title:	**PRESENTATION TO COUNCIL BY REPRESENTATIVES OF VALLEYS TO COAST (V2C)**
Report Owner / Corporate Director:	**CHIEF EXECUTIVE**
Responsible Officer:	**MARK GALVIN** **SENIOR DEMOCRATIC SERVICES OFFICER - COMMITTEES**
Policy Framework and Procedure Rules:	**There is no effect on the Policy Framework and Procedure Rules.**
Executive Summary:	**The report will invite a presentation from representatives of V2C updating members on the latest work being undertaken by the organisation.**

1. Purpose of Report

1.1 The purpose of this report is to advise Council of a presentation proposed to be delivered to Council, by representatives of V2C.

2. Background

2.1 Council will be accustomed to receiving presentations from its key partners, stakeholders and other organisations periodically in the past.

3. Current situation / proposal

3.1 The presentation will be led at its June meeting by the Chief Executive of V2C, who will be accompanied by key frontline officers from the Registered Social Landlord.

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 and Nature Implications

6.1 There are no climate change or nature 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. Recommendation

9.1 That Council is recommended to note the presentation as referred to at paragraph 3.1 of the report.

Background documents

None.

Meeting of:	**COUNCIL**
Date of Meeting:	**25 JUNE 2025**
Report Title:	**AFFORDABLE HOUSING SUPPLEMENTARY PLANNING GUIDANCE**
Report Owner / Corporate Director:	**CORPORATE DIRECTOR - COMMUNITIES**
Responsible Officer:	**ADAM PROVOOST STRATEGIC PLANNING POLICY TEAM LEADER**
Policy Framework and Procedure Rules:	**There is no impact on the policy framework and procedure rules.**
Executive Summary:	**Following approval by Cabinet at its meeting on 13th May 2025, the purpose of this Report is to provide Council with an overview of the public consultation exercise that was carried out on the draft Affordable Housing Supplementary Planning Guidance (SPG) document. It also seeks Council approval to adopt the final form Affordable Housing SPG. Adoption of the SPG will enable effective implementation of the Affordable Housing Policies within the adopted Replacement Local Development Plan, March 2024 (RLDP), the Council's statutory land-use Planning document.**

1. Purpose of Report

1.1 The purpose of this Report is to inform Council of the outcome of the public consultation exercise on the draft Affordable Housing Supplementary Planning Guidance (**SPG**) document.

1.2 The Report also seeks Council approval to adopt the final form Affordable Housing SPG **(Appendix 1)** in order to support the Affordable Housing Policies within the adopted Replacement Local Development Plan, March 2024 (**RLDP**).

2. Background

2.1 The adopted RLDP has a key role in ensuring new housing development incorporates a mix of market and affordable housing, thereby contributing to the development of sustainable, cohesive communities. '*Affordable Housing'*, for the purposes of the land use planning system, is housing where there are secure mechanisms in place to ensure that it is accessible to those who cannot afford market housing, both on first occupation and for subsequent occupiers. Affordable Housing includes *Social Rented Housing* owned by local authorities and Registered Social Landlords (**RSLs**), and *Intermediate Housing* where prices or rents are above those of Social Rent but below market housing prices or rents. All other types of housing are considered market housing, which is private housing for sale or rent where the price is set in the open market and occupation is not subject to control by the local authority. It is recognised that some schemes may provide for staircasing to full ownership and where this is the case there must be secure arrangements in place to ensure the recycling of capital receipts to provide replacement Affordable Housing.

2.2 The scale of Affordable Housing '*need*' and spatial distribution thereof were key considerations in determining the overall level and location of housing in the RLDP. The delivery of Affordable Housing is also an integral part of the RLDP's overall housing requirement, which incorporates 1,711 Affordable Housing units. An integrated mix of tenures is a crucial means of fostering sustainable communities and the RLDP plays a key role in securing suitable accommodation for households both able and unable to meet their housing needs in the open market. The RLDP's contribution to Affordable Housing provision has been robustly determined by consideration of the housing need identified in the Local Housing Market Assessment (**LHMA**), alongside rigorous viability testing to ensure formulation of viable Affordable Housing policy thresholds and percentages. However, the RLDP should not be considered the only Affordable Housing delivery mechanism to help address identified housing need.

2.3 The RLDP is clear that new housing developments must incorporate an appropriate mix of house types, sizes and tenures to cater for the range of locally identified housing needs. The adopted policy framework for the delivery of Affordable Housing is set out in RLDP Policies COM1-COM5. An Affordable Housing contribution of up to 30% is required on residential developments of ten or more dwellings, subject to the area-wide and site-specific policies detailed within Policy COM3 of the RLDP. In the interests of achieving balanced, mixed and sustainable communities, the full percentage of Affordable Housing provision will be sought on-site in the first instance.

2.4 The LHMA is a core piece of evidence in this respect as it identifies the level and type of housing need, both numerically and spatially. The latest LHMA was approved by the Welsh Government on 15th November 2024. This provides updated evidence to inform the appropriate mix of dwellings for new developments, particularly the types of Affordable Housing (namely Intermediate and Social Rented), in short supply in different areas. This evidence will be used to inform the delivery of appropriate Affordable Housing provision on new developments.

2.5 The Council's existing '*SPG 13: Affordable Housing'* was adopted on 7th October 2015 and was prepared to expand upon the Affordable Housing policies in the previous Local Development Plan. The existing 'SPG 13' is therefore out-of-date and requires re-drafting to provide current guidance regarding the implementation of adopted RLDP Affordable Housing planning policies. The replacement SPG also needs to set new Affordable Housing '*transfer values'* for reference to and inclusion in section 106 agreements (**s106**). This is due to the Welsh Government's decision to cease publishing '*land and works'* Acceptable Cost Guidance (**ACG**) from 2021, upon which such transfer values were previously based.

2.6 The Development Control Committee was informed of the need to revise the Affordable Housing SPG at its meeting on 8th August 2024. The Chair of the Development Control Committee volunteered to champion production of the replacement Affordable Housing SPG and has since been working alongside the Strategic Planning Policy Team Leader to progress the SPG.

2.7 A draft Affordable Housing SPG was then prepared, with the intention to support and provide further direction on the implementation of the Affordable Housing policies contained within the adopted RLDP. It outlines how Affordable Housing should be delivered through the planning system throughout Bridgend County Borough. New Affordable Housing must meet *'housing need'* as identified in the LHMA or respond to a *'local need'* identified by the Local Housing Authority, while enabling placemaking-led sustainable development. This multi-faceted approach is key to ensuring balanced, socially cohesive and sustainable communities.

2.8 The draft SPG provided updated, specific guidance on:

- Affordable housing requirements for residential developments, including the level of provision by location, along with the type, tenure, size and standard of affordable housing dwellings required;
- Sustainable clustering of Affordable Housing and the requirement for all developments to comply with sustainable placemaking principles;
- The use of planning obligations (via s106 agreements) to secure Affordable Housing provision for the lifetime of the development;
- The nomination process for RSLs;
- Definitions of '*nomination rights'* and '*qualifying households'* (incorporating local housing '*need*' and '*local connections'*);
- The RLDP's approach to off-site provision and financial contributions in lieu of on-site provision of Affordable Housing;
- The use of Social Housing Grant (the main capital programme funded by Welsh Government and made available to RSLs), to deliver Affordable Housing in relation to the planning system;

- Transfer values for nil-grant Affordable Housing provision;
- How issues surrounding development viability may be considered in respect of Affordable Housing provision; and
- Affordable Housing exception sites (provision of Affordable Housing on land that would not normally be used for housing).

3. Current situation / proposal

3.1 On 4th February 2025, a draft version of the SPG was presented to Cabinet. Cabinet resolved to approve that draft version SPG as the basis for public consultation for a period of 6 weeks. Cabinet also authorised officers to make appropriate arrangements for that public consultation before reporting the outcome back to Cabinet for approval to send a report to Council to seek adoption of the final form SPG.

3.2 A 6 week public consultation was held from 13/02/2025 to 27/03/2025. The public consultation was advertised in the following ways:

- Information on the public consultation, including all the documentation, representation forms and how to make representations was placed on the Council's online Consultation Portal.
- Consultation details were sent directly to approximately 150 targeted consultees including all Elected Members, Town and Community Councils, planning consultants, house builders and RSLs.
- A social media campaign was launched to promote the public consultation across various social media platforms, aiming to generate awareness throughout the consultation period. Periodic posts were made on the Council's X (formerly Twitter), LinkedIn and Facebook accounts.

3.3 At the close of the public consultation period, three representations were received on the draft SPG: one from the Home Builders Federation, one from a private developer and one from an RSL. These representations, together with the Local Planning Authority's (**LPA's**) responses to the comments raised, are provided in **Appendix 2** to this Report. Copies of the full representations are held by the Planning Department and can be viewed on request. Given the extensive publication of the public consultation and direct targeting of consultees, the response rate is considered positive in that there were no wholesale objections to the contents of the SPG.

3.4 The representors principally commented on the wording of certain paragraphs. Therefore, only minor amendments to the SPG were considered necessary in light of the comments received. These proposed amendments are now incorporated within the final form SPG, which is attached at **Appendix 1**. The paragraphs proposed for amendment following the public consultation are detailed in full at the end of **Appendix 2** for ease of reference and include:

- Enhanced clarification regarding the '*clustering*' of affordable homes within mixed-tenure residential developments.

- More emphasis placed on the need to undertake consultation with the developer to inform the RSL '*nomination*' process by the Council.

- Enhanced clarification that alternative '*viability'* models can be utilised subject to prior agreement with the LPA (where necessary).

3.5 A substantive element of the final form SPG concerns the setting of new transfer values for nil-grant Affordable Housing secured through s106 as part of major residential developments. While ACGs were used as a longstanding reference point across Wales for this very purpose, the Welsh Government (**WG**) ceased updating ACGs in this manner from 2021, due to a change in the model for determining grant funding.

3.6 Bridgend County Borough Council therefore participated in a '*Viability Sub-Group'* convened by the South-East Wales Strategic Planning Group (representing the ten LPAs in the South-East Wales Region), to determine a new methodology. This Group aimed to set new transfer values for nil-grant Social Rented Housing secured through s106 agreements. The Group's recommended option was to continue to use the 2021 ACG values as a baseline and apply an annual uplift in line with the WG's maximum published '*Social Rent inflation'* figure. This method allows for indexation linked to annual Social Rental increases, provides a regular mechanism to update these transfer values in a transparent way and promotes regional consistency.

3.7 The above proposed methodology was subject to consultation as part of the draft SPG, with derived transfer values specific to Bridgend County Borough. It is important to note that no objections were raised to this methodology as part of the public consultation. As such, the proposed methodology is considered an appropriate basis to set derived '*transfer values'* for nil-grant affordable housing secured through the planning system until any replacement National or regional methodology is adopted. In order to ensure these transfer values remain current, it is crucial that they are updated on an annual basis, applicable to both the on-site provision of Affordable Housing and commuted sums in lieu of on-site provision, as appropriate.

3.8 At its meeting on 13th May 2025, Cabinet noted the Officer's consultation responses to the representations received (as described under paragraph 3.3 above), on the draft Affordable Housing SPG, together with the resultant amendments set out in **Appendix 2.** Cabinet also approved presenting the final form Affordable Housing SPG (**Appendix 1**) to Council to seek its adoption. A non-technical summary has also now been incorporated within the SPG.

3.9 If adopted, the SPG will add weight to the interpretation and application of RLDP Affordable Housing policies, provide more detailed advice to applicants preparing planning applications and will become a '*material consideration'* in the determination of planning applications (including applications for renewal of consents). It will update and replace the previous '*SPG 13: Affordable Housing (2015)'*.

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 replacement Affordable Housing SPG will provide additional guidance and material weight to support adopted RLDP Policies that seek to enhance the supply of Affordable Housing. This is a key contributory factor to delivering Local Well-being Objective One '*A prosperous place with thriving communities'.*

5.2 The replacement Affordable Housing SPG will also 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 the replacement Affordable Housing SPG will provide additional guidance to reduce the impact of housing on climate change and the environment through provision of good quality 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. Recommendations

9.1 That Council:

(a) Note the contents of the Report and approve the Officer's consultation responses to the representations received on the draft Affordable Housing SPG, together with resultant amendments set out in attached **Appendix 2.**

(b) Adopt the final form Affordable Housing SPG (**Appendix 1**) for immediate application in making development management decisions and in the determination of planning applications along with the adopted RLDP, subject to the provisions of Recommendations c) and d).

(c) Authorise the Corporate Director - Communities and Group Manager - Planning and Development Services to make minor presentational changes, typographical or factual corrections as necessary prior to publication of the adopted SPG; and

(d) Authorise the Corporate Director - Communities and Group Manager - Planning and Development Services to undertake and publish annual updates to the Affordable Housing '*transfer values*' as detailed in '*Appendix A'* of the final form Affordable Housing SPG.

Background documents

None

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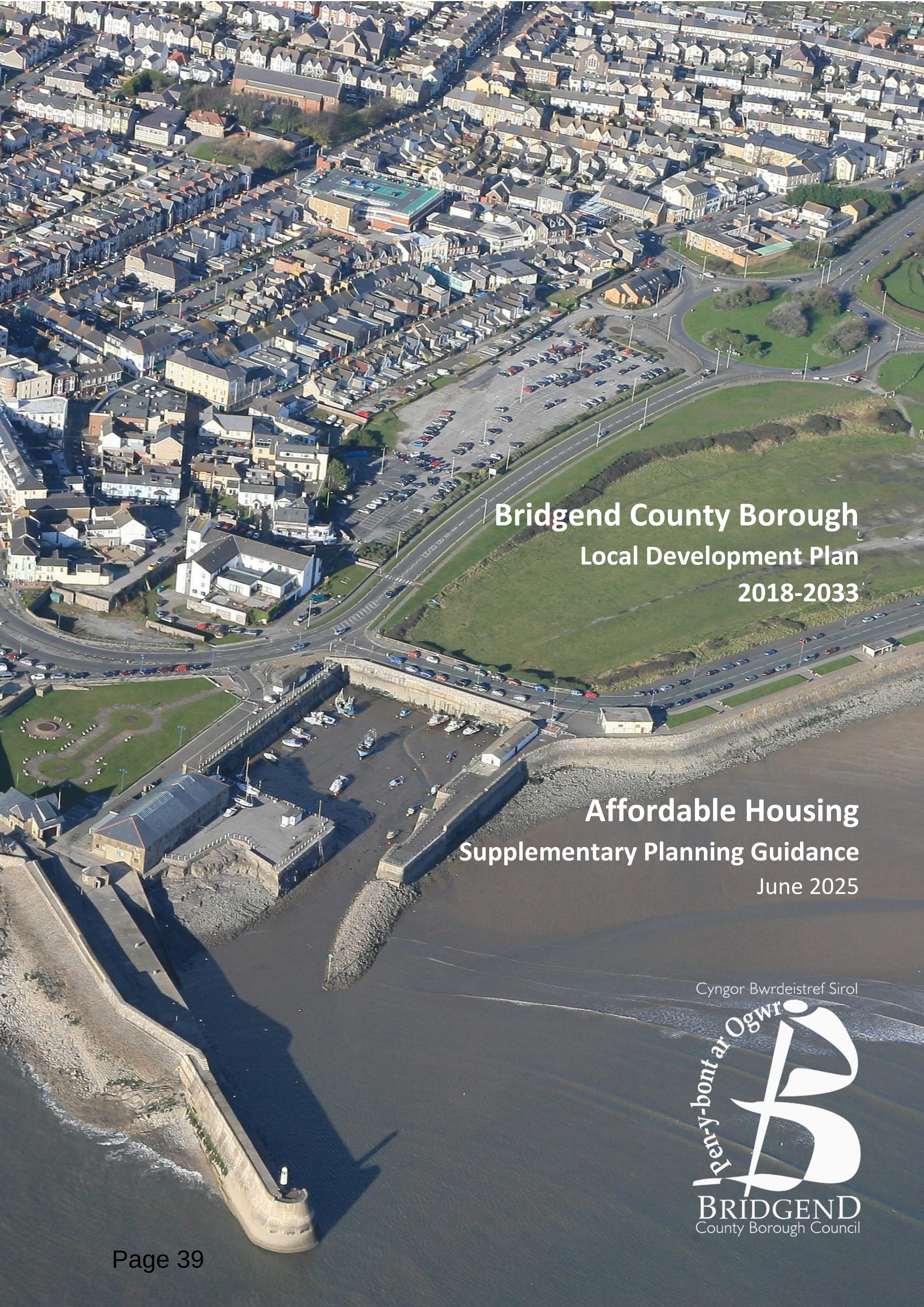


Bridgend County Borough

Local Development Plan

2018-2033

Affordable Housing

Supplementary Planning Guidance

June 2025

Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr

BRIDGEND County Borough Council

Contents

Non-Technical Summary

Affordable housing is designed to help low- and moderate-income households rent or purchase homes at below market values. A control is put in place to ensure the rent or mortgage payable is lower than what's available on the open market. Affordable housing is ringfenced for households unable to afford to rent or buy market homes due to their income or other circumstances. Affordable housing includes:

- **Social rented accommodation**, where rent levels are set by the Welsh Government. Social landlords can't raise the rent above these levels. People in social housing usually have a more secure form of tenancy than in private rented housing. Bridgend County Borough's main housing associations use one housing register to allocate social housing. This register is called the Bridgend Common Housing Register. Anyone can apply for social rented housing. However, households must be eligible and in housing need to be added to the register.

- **Intermediate accommodation**, where prices or rents are set above social rent but below market levels. This can help people who can afford more than social rent but are struggling to rent or purchase a home in the market. Intermediate accommodation is designed for households on a low to moderate income and can provide a longer term affordable rental option or a stepping stone to full home ownership. Intermediate accommodation is usually allocated to households based on eligibility criteria relating to affordability and local connections.

The planning system provides a means to secure affordable housing as part of residential developments and the definitions above are for planning purposes. It is acknowledged that some households may not qualify for affordable housing yet still find market housing unaffordable. However, this issue is beyond the scope of this document as the planning system doesn't directly set the price of market housing. This document provides guidance on how the planning system can deliver affordable housing to help boost the supply across Bridgend County Borough.

The Rhiw, Bridgend

1.0 Introduction

1.1. The purpose of this Supplementary Planning Guidance (SPG) is to support and provide further direction on implementation of the affordable housing policies contained within the adopted (March 2024) Replacement Local Development Plan (RLDP). It outlines how affordable housing should be delivered through the planning system throughout Bridgend County Borough. New affordable housing must meet '*housing need'* as identified in the Local Housing Market Assessment (LHMA) or respond to a local need identified by the Local Housing Authority (LHA), while enabling placemaking-led sustainable development. This multi-faceted approach is key to ensuring balanced, socially cohesive and sustainable communities.

1.2. This SPG will be a material consideration in the determination of all planning applications for residential development including applications for renewal of consents. Once adopted, it will update and replace the previous SPG 13: Affordable Housing (2015).

1.3. Anyone wishing to submit an application for residential development within Bridgend County Borough is urged to consider this SPG and to contact the Local Planning Authority (LPA) in advance of submitting an application, to discuss the issues that are raised in this document on a site-specific basis.

1.4. This SPG provides specific guidance on:

- Affordable housing requirements for residential developments, including the level of provision by location along with the type, tenure, size and standard of affordable housing dwellings required;
- Sustainable clustering of affordable housing and the requirement for all developments to comply with sustainable placemaking principles;
- The use of planning obligations (via section 106 (s106) agreements) to secure affordable housing provision for the lifetime of the development;
- The nomination process for Registered Social Landlords (RSLs);

- Definitions of nomination rights and qualifying households (incorporating local housing need and local connections);
- The RLDP's approach to off-site provision and financial contributions in lieu of on-site provision of affordable housing;
- The use of Social Housing Grant (SHG) to deliver affordable housing in relation to the planning system;
- Transfer values for nil-grant affordable housing provision;
- How issues surrounding development viability may be considered in respect of affordable housing provision; and
- Affordable housing exception sites.

2.0 Policy Context

2.1 The National Planning Policy context for the provision of affordable housing through the planning system is set out in Future Wales: the National Plan 2040, Planning Policy Wales (PPW) and Technical Advice Note 2 (TAN) Planning for Affordable Housing.

2.2 **Future Wales: The National Plan** is the national development framework setting out the direction for development in Wales to 2040. '*Delivering Affordable Homes*' is a key policy within Future Wales (Policy 7) and it is recognised that the planning system has a long established role in this respect. Planning authorities are required to develop strong evidence-based policy frameworks to deliver affordable housing for those who cannot meet their housing needs on the open market. Co-ordinating the delivery of housing to meet identified needs is deemed an important task for the planning system in order to engender socially mixed communities that offer a range of housing types and tenures that cater for varied lifestyles.

2.3 **PPW (Edition 12)** highlights the important contribution that affordable housing makes to community regeneration, social inclusion and the development of sustainable communities. It requires LPAs to have a full understanding of the level of affordable housing need within their area, alongside development viability and the availability of public subsidy. PPW requires development plans to include a target for affordable housing that is based on the LHMA and takes account of deliverability and viability considerations. In order to deliver this target, site capacity thresholds and proportions should be set that require residential proposals to provide affordable housing. This applies to both allocated sites and unallocated (windfall) sites, after having duly considered viability to ensure residential sites remain deliverable.

2.4 **TAN 2: Planning and Affordable Housing** provides practical guidance on the role of the planning system in delivering affordable housing. The TAN requires LPAs to include an affordable housing target in the development plan (based on the LHMA), indicate how the target will be achieved using identified policy approaches and monitor delivery of affordable housing against that target. TAN 2 also outlines the role of RSLs, planning obligations and conditions in securing affordable housing; specifying a strong presumption in favour of affordable housing being provided on the application site to engender socially mixed communities. TAN 2 defines affordable housing as,

"*housing where there are secure mechanisms in place to ensure that it is accessible to those who cannot afford market housing, both on first occupation and for subsequent occupiers. However, it is recognised that some schemes may provide for staircasing to full ownership and where this is the case there must be secure arrangements in place to ensure the recycling of capital receipts to provide replacement affordable housing*" (WG, 2006, para 5.1).

2.5 There are two main types of affordable housing as defined by TAN 2:

- Social Rented Housing - provided by local authorities and RSLs under the Welsh Government (WG) Rent Standard.
- Intermediate Housing - where prices or rents are above those of social rent but below market housing prices or rents (see also para 7.9 of this SPG).

2.6 **Cwm Taf Morgannwg Public Services Board (PSB) Local Well-being Plan 2023-28** outlines how the PSB will work together to deliver the seven well-being goals for Wales, as referenced in the Well-being of Future Generations (Wales) Act 2015. The Plan is framed around the sustainable development principle and focusses on addressing the underlying causes of problems, while helping to prevent them worsening or occurring in the future. There are two key objectives: Healthy Local Neighbourhoods and Sustainable and Resilient Local Neighbourhoods. Delivery of affordable housing through the planning system in areas where there is an identified housing need will significantly contribute to both objectives and foster cohesive, sustainable communities. The RLDP expresses, in land-use terms, the objectives of the Well-Being of Future Generations (Wales) Act 2015 and priorities of the Local Well-being Plan.

3.0 Background

3.1 The adopted 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 adopted 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 2021 LHMA were key considerations in determining the overall level and location of housing in the adopted RLDP.

3.2 While additional affordable housing is needed throughout the Bridgend County Borough, this varies by Housing Market Area in terms of quantity and type. Bridgend is denoted as the Primary Key Settlement in the adopted RLDP and is identified as the highest housing need area in the 2021 LHMA. The other identified high need areas including Pencoed, Porthcawl, the Llynfi Valley and the grouped settlement of Pyle, Kenfig Hill and North Cornelly are also denoted as Main Settlements. Affordability was identified as a less significant issue in the other Valleys housing markets, although the 2021 LHMA still identified a need to diversify the housing stock in these areas and deliver smaller yet sustainable affordable housing, especially 1 bedroom provision.

3.3 During the Plan period, development proposals within the RLDP are expected to deliver a target total of 1,711 affordable dwellings across Bridgend County Borough in order to contribute to the level of housing need identified by the LHMA. The Plan's contribution to affordable housing provision has been robustly determined by considering the housing need identified in the LHMA alongside rigorous viability testing to ensure formulation of viable affordable housing policy thresholds and proportions. **The affordable housing target only relates to sources of supply that are funded and delivered through the planning system and the Plan has made provision to deliver the affordable housing target within the designated settlement boundaries.**

3.4 The 2024 LHMA has been completed since adoption of the RLDP (March 2024) and provides updated evidence to inform the appropriate mix of dwellings for new developments, particularly the types of affordable housing (namely intermediate and social rented) in short supply in different areas. The LHMA will be refreshed periodically in accordance with WG Guidance and the latest LHMA will provide the most up-to-date evidence on housing need to inform appropriate affordable housing provision on new developments. However, it must be recognised that the housing 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 such need. The Plan’s contribution will therefore form part of several streams of affordable housing supply to meet this identified need, including 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.

Former Crown Inn, Pyle

4.0 Planning Requirements

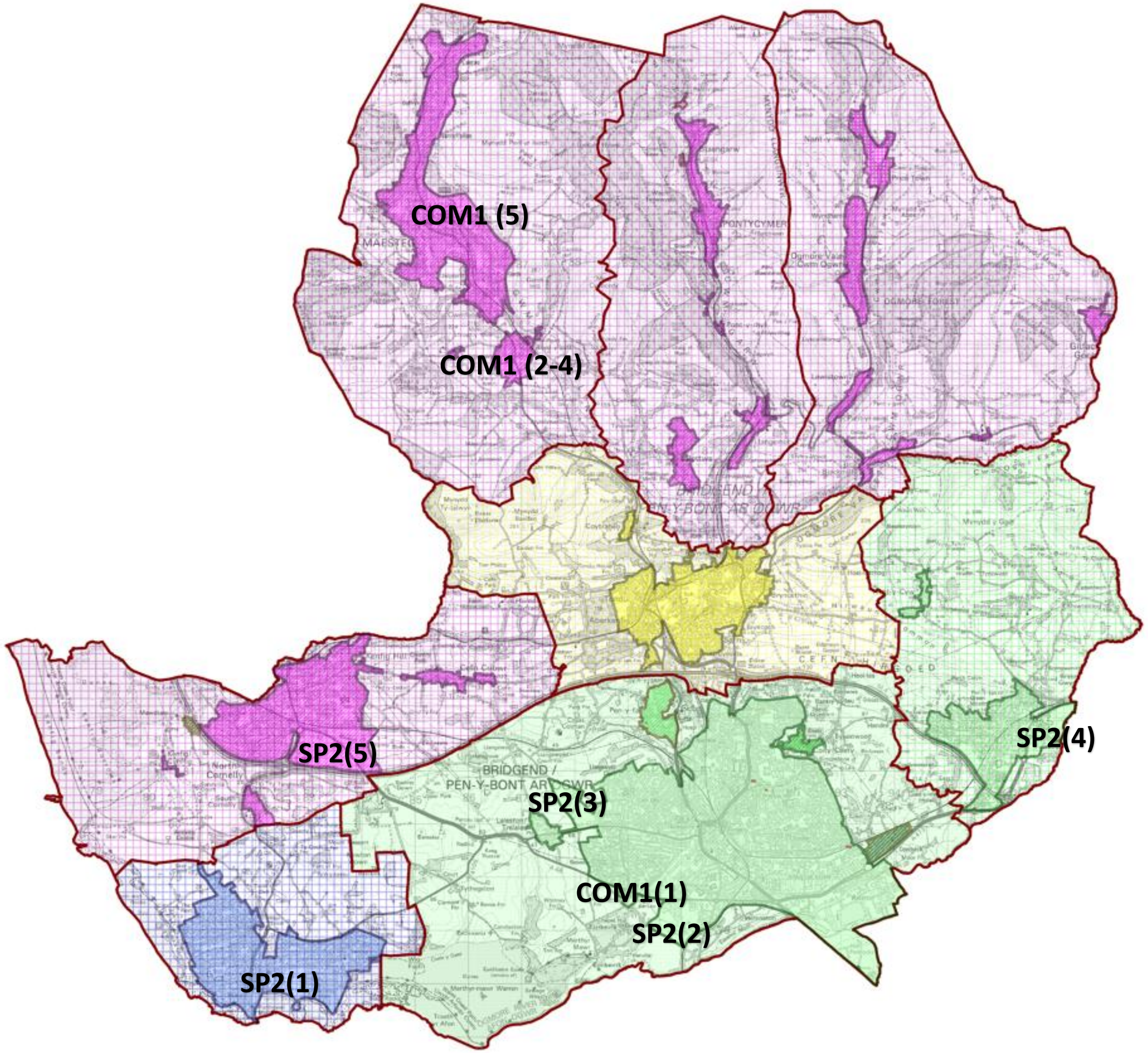
4.1 The RLDP's Sustainable Housing Strategy makes provision for 8,628 homes to meet the housing requirement of 7,575 homes. This includes delivery of a 1,711 affordable homes target over the Plan period. The strategic planning framework is set out within Strategic Policy 6 (SP6) and supported by Development Management Policies COM 1-5:

SP6: Sustainable Housing Strategy
COM1: Housing Allocations
COM2: Affordable Housing
COM3: On-Site Provision of Affordable Housing
COM4: Off-Site Provision of Affordable Housing
COM5: Affordable Housing Exception Sites

4.2 Delivery of the affordable housing target will primarily be facilitated through the Strategic Sites and Housing Allocations detailed within COM1. Combined, these components of supply will enable 977 new affordable homes to be delivered over the RLDP period, forming part of the 1,711 affordable homes target. The remainder of the affordable housing target will be delivered through new windfall applications in addition to previous completions and existing commitments at the point of RLDP adoption.

4.3 COM3 outlines the affordable housing policy requirements and thresholds for residential development to contribute to meeting the affordable housing target. Policy COM3 includes area-wide and site-specific policies based on the need identified in the LHMA, together with deliverability and viability considerations. These policy differentials are illustrated in Figure 1. The area-wide affordable housing policies will ultimately be used to assess windfall residential applications, whereas the site-specific affordable housing policies will apply to specific allocations, having been informed by bespoke viability assessments. This dual faceted approach recognises the scope for different areas and sites to viably provide affordable housing, along with all other required and necessary planning contributions.

Figure 1: Affordable Housing Requirements, Bridgend County Borough



Site-Specific Affordable Housing Policies

30% SP2(1) – Porthcawl Waterfront

20%
- SP2(2) – Land South of Bridgend
- SP2(3) – Land West of Bridgend
- SP2(4) – Land East of Pencoed
- COM1(1) – Craig y Parcau, Bridgend

15%
- SP2(5) – Land East of Pyle
- COM1(2) – Land South East of Pont Rhyd-y-cyff
- COM1(3) – Land South of Pont Rhyd-y-cyff
- COM1(4) – Land South West of Pont Rhyd-y-cyff
- COM1(5) – Former Cooper Standard Site, Ewenny Road, Maesteg

Area-Wide Affordable Housing Policies
(Applicable to Windfall Sites)

- 30% - Porthcawl
- 15% - Bridgend and Pencoed
- 10% - Valleys Gateway
- 0% - Llynfi, Ogmore and Garw Valleys
  - Pyle, Kenfig and Cornelly

4.4 Policy COM3 applies to all proposals for self-contained residential dwellings (i.e. all uses that fall within class C3 the Use Classes Order in Wales) with a capacity to deliver a net gain of 10 or more dwellings. This includes C3 residential elements of: housing sites, mixed-use developments, developments targeted at households of a prescribed age category (i.e. 'retirement' apartments), sheltered housing or extra care developments.

4.5 However, Policy COM3 does not apply to rural enterprise dwellings as such applications will be subject to an appropriate series of separate planning restrictions (based on the guidance detailed in TAN 6). These restrictions will require the retention of a rural enterprise dwelling for rural enterprise workers. In the event that an appropriate rural enterprise worker cannot not be found to occupy such a dwelling, eligibility would then be extended to persons who would be eligible for affordable housing under the LHA's Allocation Policy.

4.6 COM3 is clear that, in the event that the target percentage produces a requirement for a partial affordable dwelling, the affordable housing contribution will be rounded up to the nearest whole number. All viability testing supporting the RLDP has been conducted on this basis and this principle applies to both the area-wide and site-specific policy requirements.

4.7 Where a site has been subdivided, including where adjacent parcels have been brought forward separately for development, all development parcels will be aggregated and treated as a single proposal for the purposes of applying the thresholds and policies within COM3. Where such circumstances produce combined total dwelling numbers that meet or exceed the specified thresholds, an affordable housing contribution must be provided on-site in the first instance. Off-site contributions will only be accepted in this scenario provided that all criteria within COM4 are met. A financial contribution in lieu of on-site provision of affordable housing must be fully justified and equivalent in value to what would have otherwise been required on-site. These principles also apply in the event that a major housebuilder transfers part of a site to another developer or Small to Medium Enterprise (SME).

5.0 On-Site Provision of Affordable Housing

5.1 Policy COM3 seeks to secure appropriate on-site affordable housing provision from new residential developments in order to contribute to the affordable housing requirement set out in Policies SP6 and COM2. On-site provision is considered to be the optimal means of delivering affordable housing in order to foster sustainable, balanced, mixed tenure communities across the County Borough. For this reason, the full policy compliant percentage of affordable housing provision will be sought on-site in the first instance and there will not be a presumption in favour of off-site contributions.

5.2 For outline planning applications, a commitment to the delivery of affordable housing will be necessary where applicable, to be secured through a s106 agreement. This commitment will include details of the dwelling types, sizes, standards and tenures that must be accommodated on any subsequent reserved matters application. The siting and layout of those dwellings must then be detailed in any subsequent reserved matters application following liaison with the LPA. The onus will be on the applicant to ensure that the respective affordable dwellings are identifiable on the site layout plan in order for the extant commitment to be met.

Space Standards

5.3 WG specifies that "*all affordable housing, including that provided through planning obligations and planning conditions, must meet the Welsh Government's development quality standards*" (PPW Edition 12, para 4.2.30). This requirement applies to both social rented and intermediate dwellings. Developers should refer to Welsh Development Quality Requirements (WDQR) 2021 (or subsequent updates thereof), which clarify that:

> *"New affordable homes delivered through planning agreements (under section 106 of the Town and Country Planning Act 1990) and planning conditions will only be required to meet the Appendix A and Appendix B "space requirements" for agreements entered into after 01 October 2021* (WG, 2021, p.1)".

5.4 Applicants must demonstrate that proposals for all new affordable housing (including social rented and intermediate dwellings) meet these WDQR standards. **The onus will be on the applicant to demonstrate compliance by clearly annotating the plans and confirming in writing that the proposal complies with these requirements**. All family homes should also have a private garden which is safe for small children to play in, convenient to use, of sufficient size and is easy to maintain.

5.5 The requirement to achieve WDQR compliance also applies to rehabilitated general needs affordable homes. WDQR 2021 states:

> *"Where homes are being refurbished, providers should (if practicable and cost effective to do so) take all opportunities to meet the standard, but where this is not possible homes must have adequate space and facilities for everyday living* (*ibid*.)".

This guidance will apply to refurbishment proposals that result in a net gain of 10 or more dwellings where the requirements to provide affordable housing under Policy COM3 are met. The applicant will need to demonstrate that the resultant affordable dwellings achieve WDQR compliance in the first instance. Refurbishment proposals that would result in non-WDQR compliant dwellings must be fully justified based on site-specific constraints and/or viability restrictions, while also demonstrating the dwellings will still provide adequate space and facilities for everyday living.

<u>Clustering, Tenure and Dwelling Mix</u>

5.6 Large concentrations of affordable housing can lead to stigmatisation, social disintegration and unstable communities. Supporting paragraph 5.3.28 to Policy COM3 therefore provides further guidance on sustainable clustering of affordable housing within wider residential and mixed-use developments. It is clarified that "*affordable housing should not be obviously segregated through layout, location or design*" and "*integrated into the overall development through separate clusters of no more than ten affordable units*".

5.7 A 10-unit cluster is considered to be the maximum appropriate size for a sustainable cluster of affordable housing on a mixed-tenure housing development. This has been informed by routine discussions with RSL housing managers that operate across the region. Affordable housing clusters of more than 10 units can otherwise become increasingly unconducive to the delivery and maintenance of balanced, mixed tenure communities. Clusters of affordable housing should be carefully dispersed throughout the development to avoid over-concentration of single tenures in any part of the layout plan and avoid obvious tenure segregation. In instances where development proposals exceed Policy COM3's minimum affordable housing requirements, due to grant support or otherwise, a more flexible approach to clustering may be acceptable where justified, providing this does not jeopardise sustainable integration of affordable units. Equally, where proposals demonstrate they have sought to deliver sustainably high residential densities in accordance with Policy COM6, it may be considered appropriate to abut limited discrete affordable tenure clusters. This may include, for example, one cluster of social rented units abutted to one cluster of Low Cost Home Ownership units, providing the affordable units are sustainably integrated into the wider development.

5.8 The precise mix of affordable dwellings in terms of tenure, size and type will vary geographically and over time. In the first instance, applicants should consult the findings of the latest LHMA in order to inform dwelling mixes or otherwise ensure proposals respond to pressing housing need identified by the LHA. In all cases, applicants must demonstrate and justify how they have arrived at a particular mix of housing. The LPA will consider whether the proposal responds to identified housing need and if it contributes sufficiently towards the objective of creating mixed communities. In some instances, a revision to the mix of housing may be necessary to render the development acceptable in planning terms. The LPA will work collaboratively with developers to optimise affordable housing provision in these respects, having regard to all material considerations.

5.9 There is a high and longstanding need for sustainable one bedroom accommodation in the social rented sector. One bedroom walk-up flats with no communal spaces are often the most sustainable means of meeting this need. This is due to their high propensity for seamless integration into the street scene, lack of communal spaces to facilitate effective tenancy management and potential for the ground floor to accommodate households with mobility restrictions. In the first instance, developers should strive to meet any identified need for one bedroom social rented provision via walk-up flats.

5.10 Policy COM6 specifies that residential development should seek to reflect a density of 50 dwellings per hectare in the first instance, particularly along public and mass transport hubs to maximise opportunities for transit orientated development. A lower density of development will only be permitted where the criteria within Policy COM6 are met, and, in all cases, Good Design must be utilised to maximise the density of development. PPW defines Good Design as being *"not just about the architecture of a building but the relationship between all elements of the natural and built environment and between people and places"* (WG, 2024, para 3.3). PPW provides five key aspects of Good Design (access, environmental sustainability, character, community safety and movement), which should be applied to all development proposals, at all scales.

5.11 It is acknowledged that it may not always be possible to meet the entirety of identified one bedroom social rented need via walk-up flats in order to achieve the policy requirements of COM6. Smaller quantities of flats accessed via communal entrances may therefore be acceptable where they are well integrated into the street scene and do not result in poorly assimilated blocks of social rented flats. Where communally accessed social rented flats are proposed, they should utilise similar scale and massing to other private dwellings within the site to enable design synergies. For example, three storey blocks of flats can be designed in a similar external aesthetic manner to three storey town houses to aid visual integration. Conversely, prominent blocks of social rented flats sited within isolated extremities of site layout plans should be avoided. Developments should ultimately seek to minimise visual tenure separation by assimilating affordable housing into the wider development through Good Design to promote tenure indistinctiveness.

Nomination and Allocation Process

5.12 Affordable housing secured through the planning system should normally be transferred to a Council nominated RSL or to the Council itself and **must be subject to allocation through the Council's Housing Allocation Policy**.

5.13 Details of the nominated RSL will be provided by the LHA to the developer prior to commencement of development. The LHA will nominate the RSL for all affordable housing secured through the planning system or take direct ownership of such dwellings in consultation with the developer. No particular RSL will be named in any s106 agreement. The LHA will manage the nomination process in consultation with the developer. This arrangement will also provide flexibility to safeguard delivery of affordable housing in the future should the ownership of the site or the RSL need to change prior to completion of the development.

5.14 RSLs should not assume they have been or will be nominated to purchase nil-grant affordable housing secured through the planning system on any particular development site unless this has been confirmed in writing in advance by the LHA. The process for nominating an RSL will be determined and managed by the LHA in consultation with the developer. Proportionate distribution of nil-grant s106 dwellings will be sought across RSL partners over the RLDP period.

Parc Tondu, Tondu

6.0 Off-Site Affordable Housing Provision and Commuted Sums

6.1 Policy COM3 is clear that, "*affordable housing will be expected to be delivered on-site in the first instance and off-site provision and/or financial contributions will only be accepted in lieu of on-site provision in exceptional circumstances*". As such, there is no presumption in favour of deviating from full, policy compliant affordable housing provision delivered on-site. Robust evidence must be provided to demonstrate any exceptional circumstances that may warrant off-site provision or the payment of financial contributions in lieu of on-site provision in accordance with Policy COM4.

6.2 The circumstances where off-site provision or commuted sums may be appropriate will be exceptional by their very nature and this SPG does not seek to provide an exhaustive list. Where these exceptions relate to site-specific constraints the onus is on the developer to demonstrate why it would not be possible to utilise Good Design principles to seamlessly integrate affordable and market dwellings by using similar massing, scale and design.

6.3 In the event that a completed s106 agreement provides for affordable units to be transferred to an RSL but the LHA is unable to successfully nominate an RSL to acquire those units, then a commuted sum option may be acceptable as a last resort. Once all avenues for transferring the affordable dwellings to an RSL or the Council have been exhausted, the developer would then be able to treat those dwellings as market dwellings subject to the payment of an equivalent sum to the Council in lieu of on-site provision.

6.4 In all cases, any off-site provision or commuted sum agreed as a last resort must be equivalent to achieving full policy compliance on-site. If off-site provision is deemed acceptable, the resultant affordable dwellings must be of the same standard, size and tenure otherwise required on-site. If a financial contribution is deemed acceptable, the commuted sum payable to the Council must be of an equivalent value to the developer's financial contribution required to deliver the affordable housing on-site (refer to paragraph 7.12).

Garw Valley

7.0 Funding Arrangements and Transfer Values

7.1 Plan-wide and site-specific viability testing has demonstrated that the affordable housing contributions specified within Policy COM3 are viable without subsidy. The RLDP's contribution to meeting affordable housing need is therefore not grant dependent. Developers should not assume that SHG will be made available to support the development of affordable housing on private developments. Developers are expected to provide the equivalent subsidy to deliver affordable housing and this will be factored into the transfer price for each affordable dwelling based on its size, type and tenure.

7.2 It is recognised that affordable housing schemes proposed by RSLs will typically seek to deliver a higher percentage of affordable housing than required by COM3 and are often 100% affordable housing developments supported by grant. In such instances, the RSL will still be required to enter in a s106 agreement to secure RLDP policy compliance as a minimum. This is necessary to safeguard affordable housing delivery in the event that the site changes ownership in the future. **An affordable housing led scheme will also not be exempt from other planning obligations necessary to achieve wider RLDP policy compliance. Such obligations may include parks (such as equipped playing areas and recreation space), education provision and/or highways improvements.**

Transfer Values for Nil-Grant Social Housing

7.3 Transfer values for nil-grant social housing secured through the planning system have historically been linked to WG's Acceptable Cost Guidance (ACG). The developer's contribution has conventionally equated to the 58% of ACG grant intervention rate that would otherwise be utilised for SHG funded schemes. In essence, the RSL or the Council would purchase each social rented dwelling from the developer for 42% of the full ACG.

7.4 ACGs were historically set to include both a land value component and a works component, varying by dwelling size, type and geographical band. They were used as a common reference point for s106 transfer values as they were considered to represent typical costs for building social rented dwellings. However, WG ceased updating ACGs in this manner from 2021 due to a change in the model for determining grant funding. Works costs are now the only element WG prescribe, with the land value component determined via a bespoke assessment for each SHG scheme. The ‘works only’ ACGs now published by WG are therefore unsuitable to set nil-grant affordable housing transfer values for s106 schemes. This is because they do not include a land value component and should only be used in conjunction with WG’s Standard Viability Model (SVM) to inform SHG funded schemes.

7.5 The final ‘land and works’ ACGs published by WG in August 2021 remain the last reference point to set nil-grant affordable housing transfer values within s106 agreements. However, these values are becoming increasingly outdated and a new methodology is required. Bridgend County Borough Council participated in a Viability Sub Group convened by the South East Wales Strategic Planning Group (representing the ten LPAs in the South East Wales Region) to determine a new methodology. This Group aimed to set new transfer values for nil-grant social housing secured through s106. The Group’s preferred and most pragmatic option was to continue to use the 2021 ACG values as a baseline and apply an annual uplift in line with the WG’s maximum published social rent inflation. This method allows for indexation linked to annual social rental increases, provides a regular mechanism to update these values in a transparent way and also promotes regional consistency. This methodology has been proposed for use in this draft SPG, although the derived transfer values are specific to Bridgend County Borough.

7.6 The resultant 2025 transfer values are detailed in Appendix A and will be updated as necessary. In practice, the nominated RSL or the Council would pay the developer the ‘Transfer Values’ detailed in Table 1 or Table 2 of Appendix A (dictated by the size of the development). These transfer values are 42% of the uplifted ACG figures, following the longstanding intervention rate used for nil-grant s106 developments. The values vary according to the dwelling type, size and Housing Market Area (formerly ‘band’, now re-defined to reflect the eight Housing Market Areas referenced in the LHMA).

Transfer Values for Nil-Grant Intermediate Housing

7.7 Successive LHMAs have found that 70% of Open Market Value (OMV) produces a ‘*usefully affordable’* intermediate product in many parts of the County Borough. However, due to wider house price to income ratios, a 60% OMV product is typically required within Porthcawl in order to meet the needs of newly forming households. All viability testing to support the adopted RLDP has been undertaken on this basis and developers are therefore required to subsidise purchase of intermediate units by 40% of OMV in Porthcawl and 30% of OMV in all other parts of Bridgend County Borough. Households must be either nominated by or nominated in accordance with criteria set by the LHA for intermediate dwellings based on an assessment of housing need.

7.8 In practice, the nominated RSL or nominated household would purchase each intermediate unit from the developer for 60% of OMV (in Porthcawl) or 70% of OMV (elsewhere in Bridgend County Borough). The OMV for each dwelling is to be calculated based on equivalent sales values achieved on the respective site. In the unlikely event that there are no similar property types on the development site to inform the OMV, the transfer value is to instead be based on new build Land Registry Price Paid data within the wider vicinity of the site (with an appropriate new build uplift being applied if there is insufficient new build transactional data available to generate robust average prices).

7.9 This transfer arrangement applies to all forms of intermediate accommodation, including:

Low Cost Home Ownership – where the nominated purchaser buys a home at a percentage of its OMV (i.e. 70%) and the remaining cost of the property (i.e. 30%) would be subsidised by the developer and effectively held as an interest free equity loan by the nominated RSL or Council.

Intermediate Rent – where rents are set above social rents and below market rents.

Shared Ownership – where the nominated household purchases a share of the property and pays rent to the nominated RSL or Council on the remainder.

7.10 The most appropriate form of intermediate accommodation should be determined based on the findings of the latest LHMA and/or needs identified by the LHA. However, the fundamental requirement is to produce a usefully affordable intermediate product for households in need across Bridgend County Borough. In order to be considered '*usefully affordable'*, intermediate products should seek to achieve a mortgage or rent that is no more than 25% of gross lower quartile household income within the locality. This is based on the affordability criteria justified within the 2024 LHMA, defined in accordance with WG LHMA Guidance (2022), although is a guide rather than a set target. In practice, there can be an overlap between households who can afford different forms of intermediate tenures. The most appropriate intermediate tenures will be determined on a site by site basis, taking local housing market conditions into account. The precise nature of any intermediate tenures to be delivered will require detailed consideration of local house prices, private rents, social rents and housing need and should be agreed with the LHA in the first instance.

7.11 Intermediate provision will most likely comprise a mix of Low Cost Home Ownership and Intermediate Rent tenures as they are most likely to produce *'usefully affordable'* end products. The scope to introduce Shared Ownership products is likely to be more limited in most parts of Bridgend County Borough. This tenure can nevertheless be considered as a means of meeting housing need where robust evidence demonstrates Shared Ownership is capable of producing a *'usefully affordable'* product in the market catchment area of the site.

Calculating Commuted Sums

7.12 Where a financial contribution in lieu of on-site affordable housing provision has been justified and deemed acceptable by the LPA, it must be secured through a s106 agreement and calculated on the following basis:

Social Rented Commuted Sum Contribution (per dwelling type) =

A) Uplifted ACG x **B)** Intervention Rate x **C)** Number of Dwellings

Where:

A) = the total uplifted ACG value for that dwelling size, type and Housing Market Area as detailed in Appendix A, Table 1 (for developments of 10 homes and under) or Table 2 (for developments of 11 homes and over).

B) = 58% of A), which reflects the conventional grant intervention rate and the effective subsidy the developer would otherwise be expected to provide on-site.

C) = the number of social rented dwellings of that size and type the developer would otherwise be expected to deliver on-site.

Intermediate Commuted Sum Contribution (per dwelling type) =

A) OMV x **B)** Intervention Rate x **C)** Number of Dwellings

Where:

A) = the OMV for each dwelling according to its size and type, based on equivalent open market sales values achieved on the respective site. If there are no similar property types on the development site to inform the OMV, the OMV is to instead be based on new build Land Registry Price Paid data within the wider vicinity of the site (with an appropriate new build uplift being applied if there is insufficient new build transactional data available to generate robust average values).

B) = 40% of A) in Porthcawl or 30% of A) in the remainder of Bridgend County Borough, which reflects the effective subsidy the developer would otherwise be expected to provide on-site.

C) = the number of intermediate dwellings of that size and type the development would otherwise be expected to deliver on-site.

8.0 Section 106 Agreements

8.1 S106 agreements are legal agreements between a planning authority and a landowner/developer, or undertakings offered unilaterally by a landowner/developer, that ensure certain obligations related to a development are complied with. Affordable Housing is one such type of obligation which will normally be secured by means of a legal agreement under s106 of the Town and Country Planning Act 1990 (as amended).

8.2 S106 agreements bind the land, are registerable as a local land charge and apply to successive owners of the land. S106 agreements will typically specify the following in relation to affordable housing:

8.2.1 **The number, type, size, layout, tenure and standard of affordable dwellings to be built on site**. Provisions will also be included for those dwellings to be retained as affordable housing at least for the lifetime of the development or, in accordance with TAN2, include secure arrangements to ensure the recycling of capital receipts to provide replacement affordable housing (where applicable). The onus will be on the applicant to identify the location of the respective affordable dwellings on the site layout plan (for full planning applications) and confirm conformity to WDQR within the terms and conditions of the s106 agreement to ensure compliance. For s106 agreements entered into at outline planning application stage, a commitment to the delivery of affordable housing will be necessary where applicable. This will include details of the unit types, sizes, standards and tenures that must be accommodated on any subsequent reserved matters application. The siting of those committed affordable dwellings must then be detailed in any subsequent reserved matters application following liaison with the LPA.

8.2.2 **Definitions relating to nomination rights and qualified households.** Provisions will be included to define the Council's nomination rights for qualifying households, which is the procedure whereby the Council will identify applicants from its housing list to be housed in any given affordable housing dwelling in accordance with its Housing Allocation Policy. Qualifying households will also be defined as households that have been confirmed by the Council as being in need of affordable housing in the locality. Such households must be registered on the Common Housing Register or any waiting list held by the Council for housing need, have a life or work connection to the locality or be able to demonstrate that they are unable to meet their housing needs within the open housing market.

8.2.3 **Trigger points when affordable housing must be provided on-site.** The trigger points will conventionally be tied to the occupation of open market dwellings. Affordable housing will either need to be delivered in full on or prior to the defined trigger point or at phased stages on or before several trigger points (for larger sites).

8.2.4 **Transfer arrangements to a Nominated RSL or the Council.** Provisions will be included in the s106 agreement to confirm when details of the Nominated RSL or the Council (if the Council is to acquire any affordable dwellings), will be provided to the developer in writing by the Council (normally prior to commencement of development and following consultation with the developer). Details of the transfer price will be included in accordance with the guidance in Chapter 7 of this SPG. The point(s) by which the developer must enter into a contract for the sale of the affordable dwellings to the nominated RSL or to the Council (as applicable) will also be specified in the s106 Agreement.

8.2.5 **Contingency arrangements for provision of financial contributions in lieu of on-site provision in exceptional circumstances.** Specification of alternative arrangements will be provided if a nominated RSL or the Council declines or fails to purchase the affordable dwellings on-site within a specified period. Such contingency arrangements will firstly include nomination of an alternative RSL followed by payment of a commuted sum equivalent in value to on-site provision (as appropriate). If a commuted sum (calculated in accordance with paragraph 7.12 of this SPG) is paid to the Council in lieu of on-site provision, the developer would then be able to treat those dwellings as market dwellings. Arrangements for other unusual circumstances such as mortgage default / mortgagee in possession scenarios will also be provided for in the s106 agreement, which is usually necessary to ensure that the affordable dwellings are mortgageable.

8.2.6 **The amount and timing of any financial contribution to be paid in lieu of on-site delivery (if appropriate).** The commuted sum will be calculated as per the guidance detailed in paragraph 7.12 of this SPG and will be payable at a defined trigger point or phased proportionately over several trigger points (for larger sites). The trigger points will normally be tied to the occupation of open market dwellings.

Barnhaus, North Cornelly

9.0 Affordable Housing Exception Sites

9.1 The adopted RLDP seeks to promote sustainable development through its strategic settlement hierarchy. This identifies sustainable growth within settlement boundaries to ensure that the open countryside, as a finite resource, is protected from uncontrolled and unsustainable development. The adopted RLDP includes provision to deliver the affordable housing target of 1,711 affordable dwellings (as specified in SP6) within the designated settlement boundaries in accordance with placemaking principles.

9.2 The RLDP also provides a framework to enable affordable housing exception sites via Policy COM5. This policy recognises that there may be specific factors prohibitive to delivery of affordable housing and is intended to act as a 'pressure valve' to meet demonstrably pressing housing need. COM5 provides an exception to the general housing provision policies of the RLDP which do not otherwise permit new housing outside of settlement boundaries or on certain sites allocated for other specific uses within settlement boundaries. Nevertheless, Policy COM5 is not intended to be a mechanism to deliver significant quantities of affordable housing within unsustainable countryside locations or other inappropriate locations within settlement boundaries. The policy seeks to enable sustainable developments that are small in scale, exceptional in circumstance and respond specifically to a pressing housing need identified by the LHMA and/or LHA. **An unsustainable site will not become sustainable in planning terms on the sole basis that an applicant intends to deliver 100% affordable housing on that site.** In order for an exception site to be considered acceptable, the applicant must clearly demonstrate that the criteria within COM5 are met in the first instance, while also evidencing conformity with wider RLDP policies as a whole. The RLDP's affordable housing target does not factor in potential supply stemming from exception sites for these reasons.

9.3 The primary consideration outlined within Criterion 1 of Policy COM5 is that "*the proposal meets an identified local need that cannot be satisfied on* *alternative sites within the locality's identified settlement boundary*". In the first instance, the applicant must clearly document what identified need the proposal seeks to meet, providing written confirmation evidencing support from the LHA. The applicant must then demonstrate why that need cannot be satisfied on appropriate, alternative sites within the local settlement boundary. This applies whether the proposal is to develop a site in open countryside adjoining an existing settlement or to develop a site allocated for another use within an existing settlement boundary. The applicant should clearly evidence which alternative sites have been considered within the respective settlement boundary and justify why they have been discounted. This approach is necessary to robustly demonstrate why the pressing, identified need cannot be realistically met on alternative sites within the locality's identified settlement boundary in order to fulfil Criterion 1.

9.4 Criterion 2 of Policy COM5 also requires proposals to represent a logical extension to the existing settlement at a scale appropriate to and in keeping with the character of the settlement. Applicants must demonstrate that the development will promote legibility, which is a coherent pattern of development that reinforces local identify and facilitates well defined enclosure character. This latter point is particularly important for exception sites adjoining and edging settlement boundaries in order to retain a sense of rural fringe. Houses should front such rural edges to clearly demarcate where urban space meets countryside. Exception sites should be sensitively designed at a locally appropriate scale and provide pedestrian connections to an existing core of services and facilities to enable assimilation within the existing settlement. Exception sites that are remote relative to the existing settlement, which propose divorced concentrations of affordable housing and/or are of a scale and design that conflicts with local scale and character would be contrary to this criterion.

9.5 Criterion 2 of Policy COM5 also restricts exception sites to proposals comprising no more than ten affordable dwellings. This 10 unit cluster principle has been informed by routine discussions with housing managers in terms of the appropriate size for a sustainable cluster of affordable homes. This principle follows best practice to disperse affordable housing across larger multi-tenure housing developments and is therefore equally applicable to an exception site. Affordable housing clusters of more than 10 units can otherwise become increasingly unconducive to the delivery and maintenance of balanced, mixed tenure communities. This 10 dwelling limit applies to all Local Settlements as defined by Policy SF1.

9.6 Policy COM5 does however provide some flexibility to the 10 dwelling cluster for proposals within or adjoining Tier 1 (i.e. Bridgend) and Tier 2 Settlements (i.e. Maesteg and the Llynfi Valley, Porthcawl, Pencoed and Pyle, Kenfig Hill and North Cornelly). Exception site proposals for more than ten affordable dwellings can be considered in these settlements where applicants clearly justify the need to depart from a ten-unit cluster in the context of the wider environ and in response to acute local housing need identified by the LHMA and/or LHA. In order to substantiate the need to develop more than ten affordable homes, applicants must provide a robust affordable housing statement following the guidance detailed in RLDP supporting paragraph 5.3.35, while demonstrating Criteria A, B and C of Policy COM5 have been met. This is fundamental to evidence how a larger exception site would integrate with nearby existing communities in a manner that prevents stigmatisation and non-inclusivity, while maximising opportunities for different household structures to reside cohesively.

9.7 Criterion 3 of Policy COM5 requires any exception site to be *'in a sustainable location, within or adjoining an existing settlement boundary with reasonable access to at least a basic range of local community services and facilities'*. Proposals that would necessitate future residents to be unduly reliant on the private car will not be in accord with this criterion. These include sites divorced from existing settlements, within remote locations and/or lacking the ability to provide suitable active travel connections. In all cases, Policy COM5 is clear that exception sites must provide enhanced active travel links to connect to the Active Travel Network (walking and cycling routes in designated areas throughout the County Borough as shown on the Active Travel Network Map) and/or nearest commercial centre as appropriate. Safe, direct pedestrian and cycle access to local convenience retail provision and community facilities (such as a primary school) is essential so that residents are not forced to travel to other destinations to meet their basic needs. Applicants should demonstrate how these policy requirements have been considered and will be achieved when proposing any exception site to meet pressing, locally identified housing need.

9.8 In demonstrating Criteria 4 of Policy COM5, applicants should clearly reference how the proposed mix of dwellings, including house types, sizes and tenures has been informed to address the identified housing need for the locality. Clear linkages should be made to the latest LHMA and evidence that the proposal has been devised following dialogue with the LHA should also be provided. Applicants will also be required to enter in a s106 agreement to provide mechanisms ensuring the dwellings are accessible to those who cannot afford market housing, both on first occupation and for subsequent occupiers in accordance with Criterion 5 of Policy COM5.

9.9 As specified within Policy COM5, any form of market housing, which is accommodation that does not conform with the definition of ‘affordable housing’ set out in paragraph 2.4 of this SPG, will not be permitted on exception sites.

10.0 Development Viability

10.1 The thresholds for and percentages of affordable housing provision have been set with regard to the housing need identified within the LHMA, the Plan-Wide Viability Assessment and site-specific viability testing. Deviation from the requirements set out in Policy COM3 should not therefore be necessary and will only be acceptable in exceptional circumstances.

10.2 For allocations supported by site-specific viability appraisals at the plan making stage, applicants citing viability issues must clearly demonstrate what variables have changed that may warrant deviation from Policy COM3. Appropriate supporting evidence must be provided to substantiate any such claim and this evidence must be comprehensive. For example, it would not be acceptable to solely highlight a change in one variable (such as build costs), without clearly evidencing how other variables (such as house prices), may have also changed. A comprehensive refreshed viability appraisal must therefore be provided, with all inputs and assumptions being robustly evidenced. Unsubstantiated commentary will not be acceptable.

Ty Llwynderw, Maesteg

10.3 For windfall sites, applicants must robustly demonstrate any site-specific constraints, abnormal costs and/or other viability challenges that could necessitate a reduction from the area-wide policies set out within Policy COM3. The LPA will work collaboratively with developers in such instances to evaluate site-specific evidence. Should the LPA agree that robustly evidenced, site-specific issues adversely affect a site's viability at full policy compliance, an appropriate percentage of on-site affordable housing provision will be sought instead. The LPA reserves the right to reject any development viability claims without comprehensive supporting evidence being provided.

10.4 In all cases, it is recognised that some information necessary to demonstrate viability may be commercially sensitive. However, this is not a sufficient reason to avoid providing the appropriate evidence to the LPA and this information will be used solely to consider whether any deviation from Policy COM3 is justifiable.

10.5 There is a common viability appraisal model in use across the South East Wales Region known as the Burrows-Hutchinson Ltd Development Viability Model (DVM). The DVM has been created as a comprehensive, user-friendly model to assess the financial viability of development proposals. The LPA is able make the DVM available to applicants to appraise the financial viability of a proposed development and demonstrate any necessary deviation from Policy COM3. The primary inputs required to undertake a financial viability appraisal through the DVM are provided in Appendix B.

10.6 The DVM and user guide can be released to any applicant subject to the LPA receiving payment of a standard fee (set out in the Council's latest Fees and Charges Schedule). The fee is intended to cover the LPA's administrative costs of locking and distributing the model, verifying the completed appraisal and providing a high-level review to the applicant. However, payment of a fee will **not** guarantee a lower proportion of affordable housing will be deemed acceptable or directly result in the granting of planning permission. The fee will only enable the LPA to consider whether:

a) the DVM has been completed correctly and appropriately;

b) the evidence supplied to support the costs and values submitted is sufficient and proportionate;

c) the suggested timescales for the development are realistic; and

d) the appraisal accords with policy requirements of the RLDP and with other guidance and/or policy statements that are pertinent to the assessment of viability in a planning context.

10.7 The preliminary fee does not allow for any further time that an applicant might wish to spend debating the findings of the LPA’s initial high-level review. It also does not allow for any officer time necessary to re-appraise subsequent submissions of the model and supporting evidence, which will be re-chargeable. Alternative viability models can be used subject to prior agreement with the LPA. In the event of any unresolvable disputes, the LPA may need to draw upon expertise from a third party to act as an independent arbitrator. The costs associated with this must be met by the developer/applicant. For larger sites (of several hundred units), mixed-use developments or sites of a strategic scale, it may be more appropriate for an applicant to commission an independent arbitrator from the outset, following discussion with the LPA.

Appendix A –Transfer Values for Social Rented Dwellings

1.1 The values contained within Tables 1 and 2 below are derived from the 2021 Acceptable Cost Guidance (ACG) figures. A cumulative uplift has been applied for the four financial years since the last (and final) set of ‘land and works’ ACGs were published by Welsh Government (WG) in 2021. These 2021 ACGs are detailed within Table A, Annex A of the WG publication ‘Acceptable Cost / On Costs for Use With Social Housing Grant Funded Housing in Wales’, 2021 for self-contained general needs schemes of 11 homes or more. The 2021 ACG values have been uplifted by the following WG maximum social rent uplift caps per annum:

- April 2022 – 3.1%
- April 2023 – 6.5%
- April 2024 – 6.7%
- April 2025 – 2.7%

1.2 The nominated Registered Social Landlord (RSL) or the Council would purchase the social rented units for the respective Transfer Values detailed in Table 1 and 2 (depending on the number of homes planned within the overall development, respectively). These transfer values represent 42% of the uplifted ACG values, which reflects the longstanding grant intervention rate. Commuted sums would be payable at 58% of the uplifted ACG values, which reflects the level of subsidy the developer would effectively be required to provide on-site.

Table 1: Transfer Values for Developments of 10 Homes and Under

Housing Market Area(s)*	Dwelling Size	Dwelling Type	Uplifted ACG from 1st April 2025	Transfer Values from 1st April 2025 (42% of Uplifted ACG)	Commuted Sum Values from 1st April 2025 (58% of Uplifted ACG)
• Ogmore Valley • Garw Valley (Former WG Band 1)	7 Person, 4 Bed	House	£295,990.82	£124,316.14	£171,674.68
	6 Person, 4 Bed	House	£281,431.92	£118,201.41	£163,230.52
	5 Person, 3 Bed	House	£240,763.27	£101,120.57	£139,642.69
	4 Person, 3 Bed	House	£225,602.76	£94,753.16	£130,849.60
	4 Person, 2 Bed	House	£214,172.22	£89,952.33	£124,219.89
	3 Person, 2 Bed	House	£205,749.72	£86,414.88	£119,334.84
	2 Person, 1 Bed	House	£162,674.63	£68,323.34	£94,351.29
	3 Person, 2 Bed	Bungalow	£190,228.25	£79,895.86	£110,332.38
	3 Person, 2 Bed	Flat	£188,182.78	£79,036.77	£109,146.01
	2 Person 1, Bed	Flat	£154,372.45	£64,836.43	£89,536.02
• Llynfi Valley (Former WG Band 3)	7 Person, 4 Bed	House	£332,087.26	£139,476.65	£192,610.61
	6 Person, 4 Bed	House	£311,993.58	£131,037.30	£180,956.27
	5 Person, 3 Bed	House	£267,233.99	£112,238.28	£154,995.71
	4 Person, 3 Bed	House	£250,388.98	£105,163.37	£145,225.61
	4 Person, 2 Bed	House	£238,958.44	£100,362.55	£138,595.90
	3 Person, 2 Bed	House	£230,535.94	£96,825.09	£133,710.85
	2 Person, 1 Bed	House	£187,340.53	£78,683.02	£108,657.51
	3 Person, 2 Bed	Bungalow	£220,789.90	£92,731.76	£128,058.14
	3 Person, 2 Bed	Flat	£200,575.89	£84,241.88	£116,334.02
	2 Person 1, Bed	Flat	£165,442.02	£69,485.65	£95,956.37

Housing Market Area(s)*	Dwelling Size	Dwelling Type	Uplifted ACG from 1st April 2025	Transfer Values from 1st April 2025 (42% of Uplifted ACG)	Commuted Sum Values from 1st April 2025 (58% of Uplifted ACG)
• Bridgend • Porthcawl • Pencoed • Pyle, Kenfig and Cornelly • Valleys Gateway (Former WG Band 4)	7 Person, 4 Bed	House	£356,151.56	£149,583.65	£206,567.90
	6 Person, 4 Bed	House	£332,327.91	£139,577.72	£192,750.19
	5 Person, 3 Bed	House	£284,921.25	£119,666.92	£165,254.32
	4 Person, 3 Bed	House	£266,873.02	£112,086.67	£154,786.35
	4 Person, 2 Bed	House	£255,442.48	£107,285.84	£148,156.64
	3 Person, 2 Bed	House	£247,019.98	£103,748.39	£143,271.59
	2 Person, 1 Bed	House	£203,944.89	£85,656.86	£118,288.04
	3 Person, 2 Bed	Bungalow	£241,124.23	£101,272.18	£139,852.05
	3 Person, 2 Bed	Flat	£208,757.75	£87,678.26	£121,079.50
	2 Person 1, Bed	Flat	£172,781.63	£72,568.29	£100,213.35

*The historic WG ACG bandings have been re-defined to reflect Bridgend County Borough's eight Housing Market Areas as referenced in the LHMA.

Table 2: Transfer Values for Developments of 11 Homes and Over

Housing Market Area(s)*	Dwelling Size	Dwelling Type	Uplifted ACG from 1st April 2025	Transfer Values from 1st April 2025 (42% of Uplifted ACG)	Commuted Sum Values from 1st April 2025 (58% of Uplifted ACG)
• Ogmore Valley • Garw Valley (Former WG Band 1)	7 Person, 4 Bed	House	£272,407.81	£114,411.28	£157,996.53
	6 Person, 4 Bed	House	£258,570.84	£108,599.75	£149,971.09
	5 Person, 3 Bed	House	£221,271.19	£92,933.90	£128,337.29
	4 Person, 3 Bed	House	£207,313.90	£87,071.84	£120,242.06
	4 Person, 2 Bed	House	£196,966.25	£82,725.82	£114,240.42
	3 Person, 2 Bed	House	£189,025.03	£79,390.51	£109,634.52
	2 Person, 1 Bed	House	£149,559.59	£62,815.03	£86,744.56
	3 Person, 2 Bed	Bungalow	£175,669.35	£73,781.13	£101,888.22
	3 Person, 2 Bed	Flat	£172,180.03	£72,315.61	£99,864.42
	2 Person 1, Bed	Flat	£141,377.73	£59,378.65	£81,999.08
• Llynfi Valley (Former WG Band 3)	7 Person, 4 Bed	House	£308,504.25	£129,571.79	£178,932.47
	6 Person, 4 Bed	House	£289,132.50	£121,435.65	£167,696.85
	5 Person, 3 Bed	House	£247,741.91	£104,051.60	£143,690.31
	4 Person, 3 Bed	House	£232,100.12	£97,482.05	£134,618.07
	4 Person, 2 Bed	House	£221,752.47	£93,136.04	£128,616.43
	3 Person, 2 Bed	House	£213,811.26	£89,800.73	£124,010.53
	2 Person, 1 Bed	House	£174,225.49	£73,174.71	£101,050.78
	3 Person, 2 Bed	Bungalow	£206,231.00	£86,617.02	£119,613.98
	3 Person, 2 Bed	Flat	£184,573.14	£77,520.72	£107,052.42
	2 Person 1, Bed	Flat	£152,447.30	£64,027.87	£88,419.44

Housing Market Area(s)*	Dwelling Size	Dwelling Type	Uplifted ACG from 1st April 2025	Transfer Values from 1st April 2025 (42% of Uplifted ACG)	Commuted Sum Values from 1st April 2025 (58% of Uplifted ACG)
• Bridgend • Porthcawl • Pencoed • Pyle, Kenfig and Cornelly • Valleys Gateway (Former WG Band 4)	7 Person, 4 Bed	House	£332,568.55	£139,678.79	£192,889.76
	6 Person, 4 Bed	House	£309,466.83	£129,976.07	£179,490.76
	5 Person, 3 Bed	House	£265,429.17	£111,480.25	£153,948.92
	4 Person, 3 Bed	House	£248,584.16	£104,405.35	£144,178.81
	4 Person, 2 Bed	House	£238,236.51	£100,059.34	£138,177.18
	3 Person, 2 Bed	House	£230,295.30	£96,724.02	£133,571.27
	2 Person, 1 Bed	House	£190,829.85	£80,148.54	£110,681.32
	3 Person, 2 Bed	Bungalow	£226,565.33	£95,157.44	£131,407.89
	3 Person, 2 Bed	Flat	£192,755.00	£80,957.10	£111,797.90
	2 Person 1, Bed	Flat	£159,786.91	£67,110.50	£92,676.41

*The historic WG ACG bandings have been re-defined to reflect Bridgend County Borough's eight Housing Market Areas as referenced in the LHMA.

Appendix B – Data Inputs Required for Financial Viability Appraisals

1) List of open market dwelling types, specifying for each one:
    a) Number of bedrooms
    b) Number of habitable rooms
    c) Gross/net internal floor areas
    d) Estimated open market value (freehold selling price) with supporting evidence
    e) Total number of each dwelling type within the proposed development

2) List of affordable dwelling types, specifying for each one:
    a) Number of bedrooms
    b) Number of habitable rooms
    c) Gross/net internal floor areas
    d) Estimated open market value (unrestricted freehold selling price) for intermediate dwellings
    e) Transfer values (with reference to Appendix A) for social rented dwellings
    f) Total number of each dwelling type within the proposed development

3) Site layout plan for the development (outline, or detailed if available) with net developable areas and dwelling numbers for each element/phase of the proposed development.

4) Estimated construction and sales programmes for the development.

5) Details of current land ownership or details of the contractual terms and stage of transaction reached for its acquisition by the developer. This must include the land price paid (or, if estimated and not yet paid, the basis for that estimate) and allowance made for acquisition fees and Land Transaction Tax.

6) Planning costs and anticipated period before commencement of development (in months) after land acquisition has been completed.

7) Housing construction costs (plot costs), as a total sum or £/m^2, noting any additional allowance made for achieving compliance with forthcoming building regulations. Evidence must be provided to justify what these costs are based on.

8) Physical infrastructure costs, broken down between:

a) Off-site drainage, highway and/or other works, with detailed analysis/justification
b) Normal on-site costs for providing road access and services to individual plots (including “externals” such as detached garaging and landscaping, which may be assessed on a fixed average sum per dwelling, or as a percentage of plot costs)
c) Abnormal site costs (if any) with detailed analysis/justification

9) Allowance made for professional fees in connection with:

a) Planning and building regulations approvals
b) Housing construction costs
c) Physical infrastructure works

10) Estimated sum (or percentage allowance) for contingencies

11) S106 contributions necessary to achieve full RLDP policy compliance and anticipated timing of payments

12) Sale and marketing costs for open market dwellings

13) Finance costs, including interest rate(s) applied, and the basis for their calculation

14) Details of any proposed non-residential uses, including gross external and net internal floor areas, together with estimated costs and revenues associated with those parts of the development. This will include, where available, estimated freehold and rental values for each element/unit, the investment yield(s) on which estimated freehold values have been based/calculated, and details of any pre-lets or forward sale arrangements.

Cyngor Bwrdeistref Sirol
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BRIDGEND
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Appendix 2: Consultation Representations, Responses and Resultant Action

Section 5: On-Site Provision of Affordable Housing	
Organisation	Redrow
Representation	It is considered that the suggested clustering of 10 affordable housing units is too low and that 15, more akin to other LPAs, would be appropriate.
Local Planning Authority Response	Large concentrations of mono-tenure affordable housing can lead to stigmatisation, social disintegration and unstable communities. A 10 unit cluster is considered the maximum appropriate size for a sustainable cluster of affordable housing on major, mixed-tenure housing developments. This limit has been informed by routine discussions with RSL housing managers that operate across the region. Affordable housing clusters of more than 10 units can otherwise become increasingly unconducive to the delivery and maintenance of balanced, mixed tenure communities. This issue was considered as part of Hearing Session 3 during the RLDP Examination. The policy position was deemed sound by the independent Planning Inspector and adopted as part of the suite of RLDP policies and supporting text to those policies (Policies COM3 and PLA1-5 refer).
Resultant Action	No action necessary – the SPG provides supplementary information and guidance in respect of the adopted RLDP policy framework, but it cannot introduce new policies or change the policies in the adopted RLDP.
Organisation	Redrow
Representation	Notwithstanding the first point above it is considered that the wording of a **maximum cluster** of affordable housing units is too restrictive in some scenarios and more flexible wording should be utilised to take account of:- - The inclusion of flatted accommodation should be an example of whereby clusters of more could be appropriate.

	- If more than a policy compliant affordable housing requirement is delivered on-site (e.g. mixed tenure delivery by RSL or private developer partnering with an RSL) then clusters would likely be larger to enable good placemaking to take place. - From a management perspective RSLs would often prefer to see affordable units delivered through S106 to be in limited clusters as can limit overheads and ease of maintenance.
Local Planning Authority Response	The RLDP does not seek to promote large concentrations of mono-tenure affordable housing for the aforementioned reasons and it is beyond the scope of the SPG to change the adopted policy framework in this respect. Adopted Policies PLA1-5 state that affordable housing delivered as part of strategic sites is "to be integrated throughout the development in sustainable clusters of no more than ten units". Equally, supporting paragraph 5.3.28 to adopted Policy COM3 states, "Where affordable housing is provided, it should be constructed to Development Quality Requirement Standards and integrated into the overall development through separate clusters of no more than ten affordable units". The use of the term 'maximum cluster' in the SPG therefore accurately reflects this adopted policy framework. In response to the three examples provided: - Firstly, the inclusion of flatted accommodation within a proposed development is not considered to provide a suitable exception to the adopted policy framework alone. - Secondly, the affordable housing policy requirements detailed in COM3 are minimum requirements and assume no availability of grant. The percentage of affordable housing on a mixed-tenure site could be boosted if, for example, grant was secured to 'top up' the minimum policy requirements. It is acknowledged that 10 unit clusters may be not prove feasible to deliver completely in instances where the affordable housing ratio increases significantly with grant support. An addition to the SPG would helpfully clarify a degree of flexibility may be warranted in such circumstances and where justified by the applicant.

	- Thirdly, and contrary to the representor's statement, the 10 unit cluster policy was devised following routine discussions with RSL housing managers as to the appropriate size for a sustainable cluster of affordable homes. These discussions indicated the optimal size of a cluster is 6-8 affordable units and 10 units is therefore considered to represent the upper limit of sustainability in this respect. This approach was considered sound by the independent Planning Inspector and forms part of the adopted RLDP policy framework.
Resultant Action	Add a clarifying sentence to paragraph 5.7 that states, "In instances where development proposals exceed Policy COM3's minimum affordable housing requirements, due to grant support or otherwise, a more flexible approach to clustering may be acceptable where justified, providing this does not jeopardise sustainable integration of affordable units".
Organisation	Redrow
Representation	Paragraph 12.4 of Technical Advice Note 2 (TAN 2) states "Local planning authorities should not seek to prescribe through planning conditions or planning obligations which partners developers should use to provide affordable housing, but rather should aim to ensure practical arrangements that will deliver their policy". The proposed wording in paragraph 5.14 of the draft SPG stating "The Process for nominating an RSL will be determined and managed by the LHA (Local Housing Authority)" is considered to contract to TAN 2 advice. It is considered wording of "the LHA can suggest its preferred RSL…" would be more appropriate. The LHA cannot enforce which RSL is ultimately used providing that a developer enters a contract with an RSL (suitably defined to meet Welsh Government (WG) requirements) that operates in the area.
Local Planning Authority Response	As drafted, the SPG does not seek to prescribe a nominated RSL through conditions or planning obligations. Paragraph 5.13 currently states, "no particular RSL will be named within any s106 agreement". This is for several reasons including the future possibility that the RSL first nominated

	by the LHA does not complete the transfer of the affordable housing units or the units need to be transferred to another RSL for a certain reason. Paragraph 3.1 of Technical Advice Note (TAN) 2 states its purpose “is to provide practical guidance on the role of the planning system in delivering” (affordable housing) and emphasises the “need to work collaboratively” to this end. Paragraph 13.1 of TAN 2 also states that “an effective way of achieving control over occupancy is to involve a registered social landlord”. The draft SPG sought to remove ambiguity from the RSL nomination process and this was intended to ensure practical arrangements to deliver the RLDP’s affordable housing policies in accordance with paragraph 5.14 of TAN 2. However, in light of the representor’s comments and the need to work collaboratively as specified within TAN 2, more emphasis will be placed on consultation with the developer to inform the RSL nomination process.
Resultant Action	Paragraphs 5.13, 5.14 and 8.2.4 will be amended to include references to consult with the developer to inform the RSL nomination process.
Organisation	Home Builders Federation
Representation	Para 5.7 HBF suggest that the 10 unit cluster should not be described as a maximum, as on larger housing developments including a number of strategic sites allocated in the plan a larger number may be acceptable. Considering that this cluster could be a mix of tenure types, social rented/low-cost home ownership, this further reduces any perceived impact. HBF would suggest the following alternative wording:

	Although in most cases a 10-unit cluster is considered to be the maximum appropriate size for a sustainable cluster of affordable housing on a mixed-tenure housing development each site will be considered on its own merits.
Local Planning Authority Response	Adopted Policies PLA1-5 state that affordable housing delivered as part of strategic sites is “to be integrated throughout the development in sustainable clusters of no more than ten units”. Equally, supporting paragraph 5.3.28 to adopted Policy COM3 states, “Where affordable housing is provided, it should be constructed to Development Quality Requirement Standards and integrated into the overall development through separate clusters of no more than ten affordable units”. The use of the term ‘maximum cluster’ in the SPG therefore accurately reflects this adopted policy framework. However, it is acknowledged that in certain limited instances, it may be appropriate to abut several discrete tenure clusters of up to ten affordable housing units (such as one discrete cluster of social rented units alongside one discrete cluster of Low Cost Home Ownership units). This may be necessary to facilitate sustainable high density development, while still seeking to avoid undue concentrations of mono-tenure affordable housing, providing this does not jeopardise sustainable integration of affordable units.
Resultant Action	Add a clarifying sentence to paragraph 5.7 that states, “where proposals demonstrate they have sought to deliver sustainably high residential densities in accordance with Policy COM6, it may be considered appropriate to abut limited discrete affordable tenure clusters. This may include, for example, one cluster of social rented units abutted to one cluster of Low Cost Home Ownership units, providing the affordable units are sustainably integrated into the wider development”.
Organisation	Wales and West Housing Association
Representation	With regard to the overall delivery of affordable housing, we have a general concern over the availability of suitable sites and the lack of windfall sites within Bridgend to meet the evidenced need.
Local Planning Authority Response	The SPG clarifies the adopted policy framework although cannot change the adopted affordable housing target, suite of housing allocations or settlement boundaries.

	The RLDP's affordable housing target of 1,711 affordable dwellings has been robustly determined by considering the housing need identified in the Local Housing Market Assessment (LHMA) alongside rigorous viability testing to ensure formulation of viable affordable housing policy thresholds and proportions. The affordable housing target will primarily be delivered on allocated sites and existing sites with planning permission together with windfall sites within the settlement boundaries. There are a range of housing supply components within and to balance the housing trajectory. The affordable housing target and components of supply were both deemed sound at independent examination by the appointed Planning Inspector and form part of the RLDP's adopted policy framework. It is beyond the scope of an SPG to alter the settlement boundaries or allocate additional sites beyond those allocated as part of the recently adopted RLDP.
Resultant Action	No action necessary – the SPG provides supplementary information and guidance in respect of the adopted RLDP policy framework, but it cannot introduce new policies, new allocations or change the policies in the adopted RLDP.
Organisation	Wales and West Housing Association
Representation	The affordable housing requirements for housing allocations and windfall sites are considered to be conservative as a target and more ambitious targets may encourage higher delivery, particularly as these requirements are often eventually reduced. It is appreciated however that this will be dictated by viability on each individual scheme.
Local Planning Authority Response	The SPG clarifies the adopted policy framework although cannot change the adopted affordable housing requirements detailed within Policy COM3, which were subject to independent examination and deemed sound by the appointed Planning Inspector.

	The scale of affordable housing need and spatial distribution thereof were key considerations when determining the overall level and location of housing in the adopted RLDP. During the RLDP period (2018-33), development proposals are expected to deliver a target total of 1,711 affordable dwellings across Bridgend County Borough. The Plan's contribution to affordable housing provision has been robustly determined by considering the housing need identified in the LHMA alongside rigorous viability testing to ensure formulation of viable affordable housing policy thresholds and proportions. The affordable housing target only relates to sources of supply that are funded and delivered through the planning system and the Plan has made provision to deliver the affordable housing target within the designated settlement boundaries. As such, this target represents the added value the RLDP will contribute to affordable housing supply alongside a range of other delivery mechanisms. These include, although are not limited to, Social Housing Grant, 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. In summary, the RLDP is one mechanism to increase affordable housing supply. It has maximised nil-grant affordable provision as far as possible by setting robust affordable housing policies although cannot address all affordable housing need identified across the County Borough alone. Viability testing undertaken as part of RLDP preparation demonstrated the affordable housing policies cannot be increased further without grant intervention.
Resultant Action	No action necessary – the SPG provides supplementary information and guidance in respect of the adopted RLDP policy framework, but it cannot introduce new policies or change the policies in the adopted RLDP.
Organisation	Wales and West Housing Association
Representation	It is hoped that the Council will take a pragmatic approach to limiting affordable housing to clusters of no more than 10 units. Whilst the reasoning is understood, limiting to clusters of 10 may not always be appropriate and it would seem reasonable to have this as a target rather than an upper limit and

	for planning officers to have the flexibility to determine what is appropriate for individual sites and locations.
Local Planning Authority Response	The RLDP does not seek to promote large concentrations of mono-tenure affordable housing for the aforementioned reasons and it is beyond the scope of the SPG to change the adopted policy framework in this respect. Adopted Policies PLA1-5 state that affordable housing delivered as part of strategic sites is “to be integrated throughout the development in sustainable clusters of no more than ten units”. Equally, supporting paragraph 5.3.28 to adopted Policy COM3 states, “Where affordable housing is provided, it should be constructed to Development Quality Requirement Standards and integrated into the overall development through separate clusters of no more than ten affordable units”. The use of the term ‘maximum cluster’ in the SPG therefore accurately reflects this adopted policy framework. However, and as aforementioned, further clarity will be added to the SPG to account for situations where: A) More flexibility may be required where the percentage of affordable housing exceeds Policy COM3’s minimum affordable housing requirements, due to grant support or otherwise. B) It may be appropriate to abut several discrete tenure clusters of up to ten affordable units (such as one discrete cluster of social rented units alongside one discrete cluster of Low Cost Home Ownership units) in order to facilitate sustainable, high density development in accordance with Policy COM6.
Resultant Action	Add clarifying sentences to paragraph 5.7 that state, “In instances where development proposals exceed Policy COM3’s minimum affordable housing requirements, due to grant support or otherwise, a more flexible approach to clustering may be

	acceptable where justified, providing this does not jeopardise sustainable integration of affordable units". And "Where proposals demonstrate they have sought to deliver sustainably high residential densities in accordance with Policy COM6, it may be considered appropriate to abut limited discrete affordable tenure clusters. This may include, for example, one cluster of social rented units abutted to one cluster of Low Cost Home Ownership units, providing the affordable units are sustainably integrated into the wider development".
Section 6: Off-Site Provision of Affordable Housing and Commuted Sums	
Organisation	Wales and West Housing Association
Representation	No comment – this policy is supported.
Local Planning Authority Response	Noted.
Resultant Action	No amendments necessary.
Section 7 and Appendix A: Funding Arrangements and Transfer Values	
Organisation	Redrow
Representation	Redrow acknowledges that the approach/methodology proposed is following on that undertaken on a regional basis with the Vale of Glamorgan having already adopted their updated transfer values. From the adoption date of the SPG Redrow would strongly suggest that the values are updated ideally every 6 months or as a minimum every 12 months and commitment made to this. This is to ensure that contracts with RSLs can be entered into reflecting up-to-date information.

Local Planning Authority Response	The proposed methodology seeks to provide an annual uplift to the transfer values in Appendix A in line with the WG's maximum published social rent inflation. The rent cap is published by WG annually so it will not be possible to update the values every 6 months. However, the original intention was to allow for indexation linked to annual social rental increases. The representor's suggestion to update the values annually is therefore supported. This will provide a reference point for use in s106 agreements.
Resultant Action	No amendments necessary. Council approval will be sought to update the transfer values within Appendix A on an annual basis to ensure they remain current.
Organisation	Wales and West Housing Association
Representation	These changes are supported as they enable transparent conversations to be held with housebuilders and limit the opportunity to reduce on-site deliverability through viability arguments, thereby encouraging the delivery of affordable housing.
Local Planning Authority Response	Noted.
Resultant Action	No amendments necessary.
Section 8: Section 106 Agreements	
Organisation	Redrow
Representation	As commented on under section 5 above, the Council should not have a definitive say on the Nominated RSL and this be stipulated within the S106 agreement. It is suggested that paragraph 8.2.4 of the draft SPG be re-worded to reflect the previous comments made under section 5 above.
Local Planning Authority Response	As drafted, the SPG does not seek to prescribe a nominated RSL through conditions or planning obligations. Paragraph 5.13 currently states, "no particular RSL will be named within any s106 agreement". This is for several reasons including the future possibility that the RSL first nominated

	by the LHA does not complete the transfer of the affordable housing units or the units need to be transferred to another RSL for a certain reason. Paragraph 3.1 of TAN 2 states its purpose “is to provide practical guidance on the role of the planning system in delivering” (affordable housing) and emphasises the “need to work collaboratively” to this end. Paragraph. 13.1 also states that “an effective way of achieving control over occupancy is to involve a registered social landlord”. The draft SPG sought to remove ambiguity from the RSL nomination process and this was intended to ensure practical arrangements to deliver the RLDP’s affordable housing policies in accordance with paragraph 5.14 of TAN 2. However, in light of the representor’s comments and the need to work collaboratively as specified within TAN 2, more emphasis will be placed on consultation with the developer to inform the RSL nomination process.
Resultant Action	Paragraphs 5.13, 5.14 and 8.2.4 will be amended to include references to consult with the developer to inform the RSL nomination process.
Organisation	Home Builders Federation
Representation	Para 8.2.1 HBF question the need for the S106 to include the ‘standard of affordable Homes’ as this is already set by WG in the Welsh Housing Quality Standard (WHQS).
Local Planning Authority Response	Planning Policy Wales (para 4.2.30) requires all affordable housing, including that provided through planning obligations and planning conditions to meet WG’s Development Quality Requirements. This is equally referenced in RLDP supporting paragraph 5.3.28 to Policy COM3. Inclusion of this requirement within s106 agreements will ensure these obligations are complied with by means of a legal agreement under s106 of the Town and Country Planning Act 1990, thereby providing clarity to

	the owners and any successive owners of the land. It will also provide certainty to the nominated RSL or Council when surveying dwellings prior to handover.
Resultant Action	No amendments are considered necessary.
Organisation	Wales and West Housing Association
Representation	We are generally supportive of this guidance. We would welcome a mechanism whereby grant funded additional social housing could be facilitated through Section 106 Agreements. We would also encourage a suite of standard Section 106 conditions.
Local Planning Authority Response	The affordable housing policy requirements detailed in COM3 are minimum requirements. The percentage of affordable housing on a mixed-tenure site could be boosted if, for example, grant was secured to ‘top up’ the minimum policy requirements. As drafted, the SPG would not prevent additional grant funded social housing from coming forward. Equally, s106 agreements are utilised to secure the RLDP’s minimum policy requirements in this respect and would not prevent additional grant funded social housing from coming forward. The LPA would work collaboratively with the developer and/or RSL in such instances. A standard s106 template is in development to complement this SPG; for use in the drafting of future s106 agreements involving affordable housing contributions. While this process is related to the SPG it is ultimately a separate exercise.
Resultant Action	No amendments are considered necessary to the SPG itself, although comments are noted in respect of s106 working practices.

Section 9: Affordable Housing Exception Sites	
Organisation	Wales and West Housing Association
Representation	We agree in principle with this guidance. In terms of restricting exception sites to proposals of no more than 10 dwellings, this will not always be appropriate, and it may be that some sites outside of Tier 1 and Tier 2 locations could be suitable for a larger number of units, particularly where this has a positive impact on viability. It is considered that this should be a target rather than an upper limit and we would encourage the onus to be placed on planning officers to determine what is appropriate for individual sites. We are supportive of the flexibility for larger exception sites within and adjoining Tier 1 and Tier 2 settlements.
Local Planning Authority Response	The SPG clarifies the adopted policy framework although cannot change adopted Policy COM5: Affordable Housing Exception Sites, which was subject to independent examination and deemed sound by the appointed Planning Inspector. The RLDP seeks to prioritise delivery of affordable housing within the designated settlement boundaries in accordance with placemaking principles. COM5 is intended to act as a ‘pressure valve’ to meet very pressing housing need that is both small in scale and exceptional in circumstance and clearly cannot be accommodated within settlement boundaries. It is not intended to be a mechanism to deliver significant quantities of affordable housing within inappropriate or unsustainable countryside locations.

	Policy COM5 will facilitate delivery of small affordable housing schemes within or adjoining existing settlements where it can be clearly demonstrated that there is a pressing local need and this need cannot otherwise be accommodated within the respective settlement boundary. Affordable Housing Exception Sites must typically comprise of no more than ten units, which is the appropriate size for a sustainable cluster of affordable housing. However, Policy COM5 recognises that the Tier 1 (Bridgend) and Tier 2 (Llynfi Valley, Porthcawl, Pencoed and Pyle, Kenfig Hill and North Cornelly) Settlements are the most sustainable in the settlement hierarchy. Proposals for more than 10 affordable units may be acceptable within or adjoining Tier 1 and Tier 2 Settlements where justified in accordance with Policy COM5. This issue was considered as part of Hearing Session 3 during the RLDP Examination and the resultant policy position was deemed sound by the independent Planning Inspector.
Resultant Action	No action necessary – the SPG provides supplementary information and guidance in respect of the adopted RLDP policy framework, but it cannot introduce new policies or change the policies in the adopted RLDP.
Section 10 and Appendix B: Development Viability	
Organisation	Home Builders Federation
Representation	HBF request that some additional wording is added to indicate that other viability models can be used, but it is suggested that the model to be used is agreed with the Council prior to its use.
Local Planning Authority Response	There is no objection to the proposed amendment. While the LPA is able to make the Development Viability Model available to applicants, the SPG does not seek to prohibit the use of certain alternative viability models subject to prior agreement with the LPA. Clarification will be added to the SPG.
Resultant Action	Add a clarifying sentence to paragraph 10.7 that states “alternative viability models can be used subject to prior agreement with the LPA”.

Other Comments	
Organisation	Wales and West Housing Association
Representation	We are generally supportive of the SPG and have no further comments.
Local Planning Authority Response	Noted.
Resultant Action	No amendments necessary.

Proposed SPG Changes as a Result of the Consultation

The paragraphs proposed for amendment following the consultation are detailed below, for the reasons explained in the previous table. Strikethrough text is used to indicate proposed deletions from the SPG, whereas blue text is used to indicate proposed additions to the SPG. Only paragraphs proposed for amendment are included below, there are no proposed changes to the remainder of the draft SPG following consultation. The final draft version of the SPG (**Appendix 1**) incorporates the proposed amendments below.

5.7 A 10-unit cluster is considered to be the maximum appropriate size for a sustainable cluster of affordable housing on a mixed-tenure housing development. This has been informed by routine discussions with RSL housing managers that operate across the region. Affordable housing clusters of more than 10 units can otherwise become increasingly unconducive to the delivery and maintenance of balanced, mixed tenure communities. Clusters of affordable housing should be carefully dispersed throughout the development to avoid over-concentration of single tenures in any part of the layout plan and avoid obvious tenure segregation. In instances where development proposals exceed Policy COM3's minimum affordable housing requirements, due to grant support or otherwise, a more flexible approach to clustering may be acceptable where justified, providing this does not jeopardise sustainable integration of affordable units. Equally, where proposals demonstrate they have sought to deliver sustainably high residential densities in accordance with Policy COM6, it may be considered appropriate to abut limited discrete affordable tenure clusters. This may include, for example, one cluster of social rented units abutted to one cluster of Low Cost Home Ownership units, providing the affordable units are sustainably integrated into the wider development.

5.13 Details of the nominated RSL will be provided by the LHA to the developer prior to commencement of development. The LHA will ~~reserves the right to~~ nominate the RSL for all affordable housing secured through the planning system or take direct ownership of such dwellings ~~directly~~ in consultation with the developer. ~~On this basis,~~ No particular RSL will be named ~~with~~ in any s106 agreement. The LHA will manage the nomination process in consultation with the developer. This arrangement will also provide flexibility to safeguard delivery of affordable housing in the future should the ownership of the site or the RSL need to change prior to completion of the development.

5.14 RSLs should not assume they have been or will be nominated to purchase nil-grant affordable housing secured through the planning system on any particular development site unless this has been confirmed in writing in advance by the LHA. The process for nominating an RSL will be determined and managed by the LHA in consultation with the developer. Proportionate distribution of nil-grant s106 dwellings will be sought across RSL partners over the RLDP period.

8.2.4 **Transfer arrangements to a Nominated RSL or the Council.** Provisions will be included in the s106 agreement to confirm when details of the Nominated RSL or the Council (if the Council is to acquire any affordable dwellings), will be provided to the developer in writing by the Council (normally prior to commencement of development and following consultation with the developer). Details of the transfer price will be included in accordance with the guidance in Chapter 7 of this SPG. The point(s) by which the developer must enter into a contract for the sale of the affordable dwellings to the nominated RSL or to the Council (as applicable) will also be specified in the s106 Agreement.

10.7 The preliminary fee does not allow for any further time that an applicant might wish to spend debating the findings of the LPA's initial high-level review. It also does not allow for any officer time necessary to re-appraise subsequent submissions of the model and supporting evidence, which will be re-chargeable. Alternative viability models can be used subject to prior agreement with the LPA. In the event of any unresolvable disputes, the LPA may need to draw upon expertise from a third party to act as an independent arbitrator. The costs associated with this must be met by the developer/applicant. For larger sites (of several hundred units), mixed-use developments or sites of a strategic scale, it may be more appropriate for an applicant to commission an independent arbitrator from the outset, following discussion with the LPA.

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Meeting of:	**COUNCIL**
Date of Meeting:	**25 JUNE 2025**
Report Title:	**AMENDMENT TO THE SCHEME OF DELEGATION OF FUNCTIONS**
Report Owner / Corporate Director:	**KELLY WATSON – MONITORING OFFICER**
Responsible Officer:	**JONATHAN PARSONS GROUP MANAGER PLANNING & DEVELOPMENT SERVICES**
Policy Framework and Procedure Rules:	**There is no impact on the Policy Framework and Procedure Rules.**
Executive Summary:	**Council approval is required for a series of amendments to the Schemes of Delegation of Functions. The changes are required to grant named Officers the legal right to enter land under statutory powers as part of their duties and delegated authority to be granted to the Corporate Director Communities to authorise the relevant officers.**

1. Purpose of Report

1.1 The purpose of the report is to seek Council approval for a series of amendments to the Schemes of Delegation of Functions.

1.2 More specifically, the changes are required to allow named Officers within the Communities Directorate the legal right to enter land as part of their duties. The list of named officers will be updated on an annual basis and will include Officers from Planning, Enforcement, Building Control, Building Conservation and Design, Highways, Countryside and Public Rights of Way sections.

2. Background

2.1 Council officers are required as part of their statutory function to enter land as part of their duties. This may include planning enforcement investigations, visits in association with planning applications, visits in connection with tree preservation orders and dangerous structures. For example, Section 324 (Rights of Entry) of the Town and Country Planning Act 1990 allows any person duly authorised in writing by the Secretary of State or by a local planning authority to enter any land for the purpose of surveying it in connection with any permission, consent or determination to be given or made in connection with that land or any other land under that Part.

2.2 As a result of legislative changes, the current Scheme of Delegation of Functions requires updating to provide officers with all the necessary and relevant rights of entry under the relevant legislation.

3. Current situation/ proposal

3.1 It is proposed that the delegated function given to the Corporate Director Communities at Scheme B2 paragraph 6.1(d) in relation to the issuing of written authorisation to appropriate officers to enable them to exercise powers of entry be updated to include the following legislation:

1) Sections 196A, 196B, 196C, 214, 214B, 214C, 214D and 324 of the Town and Country Planning Act 1990 (as amended)
2) Section 88 of the Planning (Listed Buildings and Conservation Areas) Act 1990 (as amended)
3) Sections 131 and 152 of the Historic Environment (Wales) Act 2023
4) Section 106 of the Infrastructure (Wales) Act 2024
5) Section 95 Building Act 1984 (as amended)
6) Sections 219 to 225 and 289 of the Highways Act 1980 (as amended)
7) Schedule 3, Part 2 of the Environmental Protection Act 1990 (as amended)
8) Section 36 of the Planning (Hazardous Substances) Act 1990 (as amended)
9) Section 51 of the Countryside and Rights of Way Act (CROW) 2000
10) Sections 28 and 51 of the Wildlife and Countryside Act 1981 (as amended)
11) Sections 108 & 109 of the Environment Act 1995

3.2 It is further proposed that Section 88 of the Planning (Listed Buildings and Conservation Areas) Act 1990 be omitted.

3.3 If approved by Council, the sub-delegations for the Corporate Director – Communities will be updated to further delegate the provisions to the Group Manager – Planning and Development Services.

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 proposal will not have any direct impact but will enable officers to carry out their function of providing a statutory service, which is a key contributory factor to delivering Local Well-being Objectives. 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 and Nature Implications

6.1 There are no direct Climate Change or Nature 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 arising from this report.

9. Recommendations

9.1 It is recommended that Council approves the amendments to the Scheme of Delegation of Functions as set out at paragraphs 3.1 and 3.2 of the report:

9.2 Delegate authority to Monitoring Officer to make amendments to the Scheme of Delegation of Functions where such amendment is required to be made so as to comply with any legislative provision. Such amendments shall take effect when the Monitoring Officer decides or the legislation (where relevant) so provides.

Background documents

None

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Meeting of:	**COUNCIL**
Date of Meeting:	**25 JUNE 2025**
Report Title:	**REVENUE BUDGET OUTTURN 2024-25**
Report Owner/ Corporate Director:	**CHIEF OFFICER – FINANCE, HOUSING AND CHANGE**
Responsible Officer:	**JOANNE NORMAN GROUP MANAGER – BUDGET MANAGEMENT**
Policy Framework and Procedure Rules:	**As required by section 3 (budgetary control) of the Financial Procedure Rules; Chief Officers in consultation with the appropriate Cabinet Member are expected to manage their services within the approved cash limited budget and to provide the Chief Finance Officer with such information as is required to facilitate and monitor budgetary control.**
Executive Summary:	• **The net revenue budget for 2024-25 was £360.671 million. The overall outturn at 31st March 2025 is a net under spend of £300,000 which has been transferred to the Council Fund.** • **This takes into account the establishment of a net £13.063 million of new earmarked reserves in 2024-25 to enable investment into services and facilities for residents and to mitigate future risks and expenditure commitments.** • **Total Directorate budgets provided a net over spend of £2.376 million and Council Wide budgets a net underspend of £15.128 million.** • **The outturn position also takes into account additional council tax income collected over budget of £611,000 during the financial year.** • **The overall under spend on the Council budget significantly masks underlying budget pressures in Additional Learning Needs services, Home to School Transport, and Children's social care.** • **The main reasons for the overall under spend in 2024-25 are:-** ➢ **Unanticipated Welsh Government grant of £3.290 million towards the teachers' pay award for 2024-25 and NJC pay pressures.**

	➢ **A £2.044 million saving from Council agreeing a change in the Minimum Revenue Provision Policy on 23 October 2024.** ➢ **Unanticipated Welsh Government grant of £2.024 million towards revenue cost pressures.** ➢ **Not needing to utilise the £1.558 million that was built into the Medium Term Financial Strategy 2024-28 towards emerging budget pressures and as a contingency against non-deliverability of budget reduction proposals.** • **The budget approved for 2024-25 included budget reduction proposals totalling £13.045 million. At 31st March 2025 there was a shortfall on the savings target of £1.569 million, or 12.03% of the overall reduction target.** • **During 2024-25 Directorates drew down funding from specific earmarked reserves. The final revenue draw down from reserves was £5.397 million.**

1. Purpose of Report

1.1 The purpose of this report is to provide Council with an update on the Council's revenue financial position for the year ended 31st March 2025.

2. Background

2.1 On 28th February 2024, Council approved a net revenue budget of £359.725 million for 2024-25 based on the provisional local government settlement received from Welsh Government (WG) in December 2023. The Welsh Government announced its final settlement on the 27th February 2024 which included an increase in the Revenue Support Grant (RSG) for the Council of £649,540 along with three grants transferring into the settlement totalling £296,723, increasing the net revenue budget for 2024-25 to £360.671 million. The reasons for this increase were outlined in a report to Council on 13th March 2024, but were mainly in respect of an additional £14.4 million (across Wales) included in the Final Local Government Settlement to support pressures in both social care and education, including teachers' pay.

2.2 As part of the Performance Management Framework, budget projections are reviewed regularly and reported to Cabinet on a quarterly basis. The delivery of agreed budget reductions is also kept under review and reported to Cabinet as part of this process.

3. Current situation / proposal

3.1 Summary financial position at 31st March 2025

3.1.1 The 2024-25 financial year has continued to be a complex year in managing the Council's budget.

3.1.2 A significant number of grants were received in the last quarter of the financial year, the majority of which were unanticipated, including £2.637 million of Welsh Government revenue directorate grants and £3.358 million for schools, resulting in a change in the financial position between quarter 3 and quarter 4.

3.1.3 The most significant changes between quarter 3 and quarter 4 were:-

<u>Directorate budgets</u>

- Welsh Government revenue cost pressures grant - £2.024 million – allocated to Additional Learning Needs (ALN) services (£549K), Adult Social Care (£435K), Children's Services (£500K) and Home to School Transport (£540K)
- A £1.570 million reduction in the overall Insurance fund liability following a number of claims being repudiated or discontinued
- Rates rebate on Council buildings - £682,000
- Additional Welsh Government Homelessness Prevention grant - £254,000
- Additional Welsh Government ALN grant funding - £209,000
- Additional Welsh Government Afghan Resettlement grant - £198,000

<u>Schools delegated budgets</u>

- Additional Welsh Government School Standards grant - £1.594 million
- Welsh Government Teacher's pay and pension grant allocated to schools - £1.215 million
- Additional Welsh Government Reform ALN Coordinator grant - £234,000
- Additional Welsh Government Schools Causing Concern grant - £199,000

3.1.4 Given the changes that have occurred which have resulted in a better financial position at the end of 2024-25, the Council is able to earmark some of this funding to investments to support its residents. A more detailed review of Earmarked reserves is provided in section 4.4 of the report and **Appendix 4**.

3.1.5 The Council's net revenue budget and final outturn for 2024-25 is shown in **Table 1** below.

Table 1- Comparison of budget against actual outturn at 31st March 2025

Directorate/Budget Area	Original Budget 2024-25 £'000	Current Budget 2024-25 £'000	Final Outturn Q4 2024-25 £'000	Final Over / (Under) Spend 2024-25 £'000	Projected Over / (Under) Spend Qtr 3 2024-25 £'000
Directorate					
Education, Early Years and Young People	143,485	148,823	148,477	(346)	1,422
Social Services and Wellbeing	104,575	109,463	109,952	489	2,796
Communities	30,704	33,271	33,590	319	825
Chief Executive's	22,425	23,578	25,492	1,914	1,922
Total Directorate Budgets	**301,189**	**315,135**	**317,511**	**2,376**	**6,965**
Council Wide Budgets					
Capital Financing	7,052	6,907	1,351	(5,556)	(4,699)
Levies	9,635	9,645	9,549	(96)	(76)
Apprenticeship Levy	750	750	889	139	120
Council Tax Reduction Scheme	16,054	16,054	16,326	272	461
Insurance Premiums	1,363	1,363	(426)	(1,789)	(210)
Repairs & Maintenance	670	364	0	(364)	0
Pension Related Costs	430	430	465	35	41
Other Corporate Budgets	23,528	10,023	2,254	(7,769)	(9,389)
Total Council Wide Budgets	**59,482**	**45,536**	**30,408**	**(15,128)**	**(13,752)**
Net Council Tax Collection			**(611)**	**(611)**	**0**
Appropriations to Earmarked Reserves			**13,063**	**13,063**	**0**
Transfer to Council Fund			**300**	**300**	**0**
Total	**360,671**	**360,671**	**360,671**	**0**	**(6,787)**

3.1.6 The overall outturn at 31st March 2025 is a net under spend of £300,000 which has been transferred to the Council Fund, bringing the total Fund balance to £10.030 million. Total Directorate budgets provided a net over spend of £2.376 million and Council wide budgets a net under spend of £15.128 million. The outturn position also takes into account additional council tax income collected over budget totalling £611,000 during the financial year.

3.1.7 Further detail is provided on the more significant under and over spends and movements since quarter 3 in section 3.3.

3.1.8 The main financial pressures are in the service areas of Additional Learning Needs (ALN), Home to School Transport (HtST), and Children’s Social Care.

3.1.9 The Schools additional learning needs budget benefitted from £549,000 additional Welsh Government grant to support revenue cost pressures during quarter 4, along with additional ALN grant funding of £494,000. There continues to be an increase in demand for ALN support at schools resulting in an over spend of £180,000 (£1.223 million if the one-off funding had not been received from Welsh Government). Council have approved a £1.330 million budget pressure for 2025-26 to mitigate the increased demand for ALN 1:1 support in schools.

3.1.10 There is an over spend on Home to School Transport (HtST) of £80,000. This is despite Council approving growth of £1.2 million in the 2024-25 budget to address increased costs being experienced following re-tenders, mainly as a consequence of a shortage of drivers and increased fuel costs, and £540,000 of funding allocated in quarter 4 from the WG cost pressure grant. The service has seen an increase in demand for transporting pupils individually due to challenging behaviour and an increase in Additional Learning Needs (ALN) pupils requiring transport provision based on the learner's needs assessment. The pressures have been partly mitigated by the introduction of price caps on in-year tenders resulting in a significant cost saving for the service area. Council have approved a £519,000 budget pressure for 2025-26 for the underlying increased learner transport costs.

3.1.11 A 3 year sustainability plan to improve outcomes for Children and Family Services was approved by Council on 20th September 2023, funded through a recurrent revenue budget growth of £3.5 million. Progress is being made with implementing the plan, particularly to progress the steady and safe reduction in the use of agency staff, through improved retention and recruitment of a permanent workforce, including a successful grow your own scheme and international recruits.

3.1.12 The outturn for Children's Services for 2024-25 is an over spend of £1.198 million, primarily due to an over spend of £3.699 million on the Care Experienced Children budget. Council have approved a budget pressure of £3.250 million for 2025-26 to mitigate the ongoing pressures of Care Experienced Children and insufficient numbers of foster carers.

3.1.13 There continues to be pressures in learning disabilities and physical disability/sensory impairment services driven by the complexity of need and demand across these services. The Social Services Improvement Board is overseeing a number of actions to address the pressures in the adult services budget, including accelerating the work to transform learning disabilities. Council approved £1.970 million towards the increased costs of home care for adults with learning disabilities and £1 million towards additional residential/nursing placement costs due to new admissions for older people and older people with mental health needs as part of the MTFS 2024-25 to 2027-28. Further actions for 2024-25 have been developed into a 3 year Plan for Sustainable Care and Support for Adults in Bridgend County Borough Council (BCBC) that was approved by Cabinet on 19th November 2024. This plan sits alongside the 3 year strategic plan for children and family services which was approved by Cabinet in September 2023. Council have approved budget pressures for 2025-26 of £1.282 million for learning disabilities services, £679,000 for mental health services and £540,000 for Physical Disability/Sensory Impairment services.

3.1.14 Going forward, there are increased pressures on council tax collection (see paragraph 3.3.6) and an increase in eligibility for council tax support through the Council Tax Reduction Scheme (see paragraph 3.3.5) due to the continuing cost of living crisis.

Budget virements/technical adjustments

3.1.15 There have been a number of budget virements and technical adjustments between budgets since the quarter 3 Revenue Forecast was presented to Cabinet in January 2025.

3.1.16 The main virements and technical adjustments since quarter 3 are outlined below:

Budget Virements

Service vired from / to	**Amount**
Transfer of funding from the Capital Financing budget to Directorate budgets in relation to the change in Minimum Revenue Provision Policy as approved by Council on 23 October 2024.	£50,241

Technical Adjustments

Service vired from / to	**Amount**
In-year transfer of funding for inflation	£117,928
Allocation of funding retained centrally in respect of Joint Negotiating Committee (JNC) pay award for 2024-25 for Youth and Community Workers – confirmed in December 2024.	£12,356
Allocation of corporately held funding for Feasibility works in line with spend	£170,439
Allocation of corporately held funding for Revenue minor works in line with spend	£135,656

Budget Reduction Proposals

3.2 Monitoring of Budget Reduction Proposals

Prior Year Budget Reductions

3.2.1 As outlined in previous monitoring reports during the year, there were still £415,000 of outstanding prior year budget reduction proposals that have not been met in full. Directors have been working to realise these savings during the 2024-25 financial year. The position at year end is summarised in **Appendix 1** with a summary per directorate provided in **Table 2**.

Table 2 – Outstanding Prior Year Budget Reductions

DIRECTORATE /BUDGET REDUCTION AREA	Total Budget Reductions Required £'000	Total Budget Reductions Achieved £'000	Shortfall £'000
Education, Early Years and Young People	40	40	0
Communities	375	85	290
TOTAL	**415**	**125**	**290**

Note: The total budget reductions required in Table 2 represents the full original budget reduction targets.

3.2.2 **Table 2** shows that of the £415,000 prior year proposals outstanding, £125,000 have been realised, leaving a shortfall of £290,000. Proposals still not achieved include:

- COM 2 2021-22 – Re-location of Community Recycling Centre from Tythegston to Pyle (£60,000). The new site in Pyle opened in quarter 4 of 2023-24. The timing of the opening meant that exit terms of the lease were being finalised in 2024-25. Once these have been finalised the full saving will be made.
- COM 4 2022-23 – Remove Business in Focus from running Enterprise Centres in Bridgend (£20,000). The review of the Business in Focus operating model to identify operating efficiencies is ongoing at the start of 2025-26. Any shortfall in the saving achieved in 2025-26 will be mitigated by savings within the wider Corporate Landlord service area.
- COM 5 2022-23 (£50,000) and COM3 2023-24 (£120,000) – Commercially let wings of Ravens Court to a partner organisation or business (£50,000). The building was not commercially let during 2024-25 however sale of the freehold took place in the final quarter of 2024-25 which will enable the savings to be realised in full going into 2025-26.
- COM 2 2023-24 – Charging Blue Badge Holders for parking (£40,000). The traffic management team were engaged in the introduction of the default national speed limit in built up areas in 2023-24. A staff member commenced work on this proposal in 2024-25 and it is currently at initial consultation stage. It requires a full order making process, which is typically 6-9 months.

Budget Reductions 2024-25

3.2.3 The budget approved for 2024-25 included budget reduction proposals totalling £13.045 million, which is broken down in **Appendix 2** and summarised in **Table 3** below. The year end position is that £11.476 million has been achieved, leading to an overall shortfall on the savings target of £1.569 million, or 12.03% of the overall reduction target.

Table 3 – Monitoring of Budget Reductions 2024-25

	Total Budget Reductions Required	Total Budget Reductions Achieved	Shortfall
DIRECTORATE /BUDGET REDUCTION AREA	**£'000**	**£'000**	**£'000**
Education, Early Years and Young People	1,560	1,269	291
Schools	3,441	3,441	0
Social Services and Wellbeing	2,248	1,891	357
Communities	2,460	2,311	149
Chief Executive's	3,246	2,474	772
Corporate/Council Wide	90	90	0
TOTAL	**13,045**	**11,476**	**1,569**

3.2.4 The most significant (> £100,000 shortfall) budget reduction proposals not achieved in full are:-

- EDFS9 – Cessation of Adult Community Learning provision (£149,000). The shortfall is due to the timing of the required restructure with the consultation process finalised during quarter 3. Savings will be achieved in full from 2025-26.
- EDFS19 – Communications and Relationships Team (£142,000). Saving not met in 2024-25 due to the overall increase in the number of pupils needing the service. Consultation is due to start soon with the outcome of the consultation determining next steps.
- SCH1 – Efficiency saving against School Delegated Budgets – 3% in 2024-25 (£3.441 million). Saving is referenced as having been achieved due to the overall reduction in Individual Schools Budget (ISB), however as referenced in 3.3.1, the reduced budgets have resulted in an overall deficit balance for schools at year end of £619,000. Close monitoring of school budgets will continue in 2025-26 with a further 1% efficiency saving to be achieved on school delegated budgets and officers continue to work with schools to bring this overall deficit down.
- SSW13 – Council to reduce its investment into cultural services (£360,000). There was a shortfall of £295,000 against the proposal in 2024-25. On 14th May 2024 Cabinet approved a £50,000 reduction to the book fund and removal of the £15,000 subsidy for the Youth Theatre. Cabinet also approved public engagement over how future savings can be achieved and further reports will be presented to Cabinet to enable the outcome of consultation exercises to be taken into account when finalising any proposed changes. The service will also continue to maximise grant funding opportunities throughout 2025-26.
- CEX22 – Review of ICT Services (£398,000). There was a shortfall of £339,000 against this proposal in 2024-25. Further work is to be carried out on a review of the telephony budgets across the Council following a re-procurement exercise, with the full saving anticipated to be met in 2025-26.

3.2.5 **Appendix 2** identifies the projected amount of saving against these proposals in detail and action to be taken by the directorate to mitigate the shortfall. Directors continue to work with their staff to deliver their proposals or alternatives and this is reflected in the forecast outturn for the year.

3.2.6 As outlined in the MTFS reports to Cabinet and Council, MTFS Principle 7 states that “Savings proposals are fully developed and include realistic delivery timescales prior to inclusion in the annual budget. An MTFS Budget Reduction Contingency Reserve will be maintained to mitigate against unforeseen delays”. An MTFS Budget Reduction Contingency reserve was established in 2016-17. This reserve has been used to meet specific budget reduction proposals in previous years on a one-off basis pending alternative measures. It has not been used in 2024-25 to mitigate shortfalls as service areas were committed to identifying alternative one-off under spends in the service areas affected. This approach has also enabled the MTFS Budget Reduction Contingency reserve to be maintained for 2025-26 where the level of savings required to be made is £8.379 million.

3.3 Commentary on the financial position at 31st March 2025

Financial position at 31st March 2025

A summary of the financial position for each main service area is attached in **Appendix 3** to this report and comments on the most significant variances are provided below.

3.3.1 Education, Early Years and Young People Directorate

The net budget for the Education, Early Years and Young People Directorate for 2024-25, including school delegated budgets, was £148.823 million and the actual outturn was £148.477 million, following draw down of £577,000 from earmarked reserves, resulting in an under spend of £346,000.

The main variances are:

EDUCATION, EARLY YEARS AND YOUNG PEOPLE DIRECTORATE	Net Budget £'000	Projected Outturn	Projected Variance Over/(under) budget £'000	% Variance
Learner Support	6,991	7,263	272	3.9%
Early Years and Young People	2,939	2,411	(528)	-18.0%
Home to School Transport	10,929	10,849	(80)	-0.7%
Catering	1,806	1,145	(661)	-36.6%

Schools’ delegated budgets

Total funding delegated to schools in 2024-25 was £126.445 million (including Post-16 grant funding of £7.736 million).

The schools’ delegated budget is reported as balanced in any one year as any under spend or over spend is automatically carried forward, in line with Welsh Government legislation, into the new financial year before being considered by the Corporate Director – Education, Early Years and Young People in line with the requirements for managing surplus and deficit balances as set out in the Financial Scheme for Schools.

The year-end position for 2024-25 was:-

- Net overall school balances totalled £2.405 million at the start of the financial year. During 2024-25 school balances decreased by £3.023 million to a negative balance of £619,000 at the end of the financial year. Whilst this is an improved outturn position from the projected deficit of £4.989 million reported at quarter 3, it is the first time the Council has ended the financial year with an overall net deficit balance. The position would have been worse if we had not received additional grant funding of £3.358 million from Welsh Government in the final quarter of 2024-25 and maximised existing grant funding for schools at year end (£847,000).
- Out of a total of 59 schools, there are 31 schools with a deficit balance (26 primary, 4 secondary and 1 special school) and 18 schools (14 primary and 4 secondary) that have balances in excess of the statutory limits (£50,000 primary and £100,000 for secondary and special schools) in line with the School Funding (Wales) Regulations 2010. These balances will be analysed in line with the Council's agreed 'Guidance and Procedures on Managing Surplus School Balances'.
- Council approved an MTFS efficiency savings target against School Delegated Budgets of 1% in 2025-26, with an indicative 1% for 2026-27 and 2027-28. The 1% target in 2025-26 equates to £1.186 million, therefore the school delegated budgets will require close monitoring throughout 2025-26. The Financial Scheme for Schools requires schools to obtain permission from both the Corporate Director – Education, Early Years and Young People and the Section 151 Officer to set a deficit budget. Schools with deficits of greater than £50,000 in a primary school or greater than £150,000 in a secondary or special school are requested to attend termly support and challenge meetings with senior Local Authority officers. In addition, any unplanned deficits that occur within the financial year due to unforeseen circumstances must be reported as soon as they become known to the school.
- A summary of the position for each sector and overall for 2024-25 is provided below:-

	Balance brought forward	**Funding allocated in 2024-25**	**Total Funding available**	**Actual Spend**	**Balance at year end**
	£'000	£'000	£'000	£'000	£'000
Primary	283	54,386	54,669	55,413	(744)
Secondary	2,588	58,688	61,276	60,925	351
Special	(466)	13,370	12,904	13,130	(226)
Total	**2,405**	**126,444**	**128,849**	**129,468**	**(619)**

Central Education, Early Years and Young People (EEYYP) Directorate budgets

The under spend for 2024-25 for the Central Education, Early Years and Young People Directorate was £346,000. This is compared to a projected over spend position of £1.325 million at quarter 3. The main reason for the improved position in ALN services is due to the allocation of £549,000 of Welsh Government grant funding to support revenue cost pressures and an additional £494,000 ALN funding received since quarter 3. The improved position in Home to School Transport is due to the allocation of £540,000 from the Welsh Government grant funding to support revenue cost pressures. Without this additional one-off funding, the Directorate would have over spent by £1.237 million.

Learner Support Group

- There is a net over spend of £272,000 in Learner Support Group budgets, which has improved by £849,000 from the projected net over spend of £1.121 million at quarter 3.
- The Schools additional learning needs budget benefitted from £549,000 additional Welsh Government grant to support revenue cost pressures during quarter 4, along with additional ALN grant funding of £494,000.
- There continues to be an increase in demand for ALN support at schools resulting in an over spend of £180,000 (£1.223 million if the one-off funding had not been received from Welsh Government). The underlying over spend remains in the areas of sensory support and communication, complex medical needs, and relationship support. The number of pupils supported in these three areas in 2022-23 was 174, increasing to 277 in 2023-24, further increasing to 302 in the summer term, 340 in the autumn term and 364 in the spring term of 2024-25.
- Council have approved a £1.330 million budget pressure for 2025-26 to mitigate the increased demand for ALN 1:1 support in schools.
- The directorate has been proactive in devolving funding to schools to prevent the use of agency costs for 1:1 support. 19 pupils were supported in the autumn term and 18 in the spring term. This is in addition to 5 pupils in Heronsbridge and 19 pupils in Ysgol Bryn Castell. It is estimated that the preventive costs of this approach equated to £715,571 in 2024-25.
- The inter-authority recoupment budget over spent in 2024-25 by £167,000. There continues to be an increase in demand for Bridgend pupils to use out-of-county placements as there were insufficient spaces at Heronsbridge School and Ysgol Bryn Castell. Out-of-county placements initially reduced from 21 (spring 2024) to 19 in the summer term, and then there was a further reduction to 14 in the autumn term, but this increased to 21 in the Spring term 2025.
- There was a projected £200,000 over spend on the Adult Community Learning budget at quarter 3 which was primarily due to the shortfall on the MTFS saving of £149,000 against the service. The shortfall was due to the timing of the finalised restructure which took place in November 2024. In quarter 4, due to maximisation of grant funding, the over spend reduced to £56,000. The MTFS saving will be made in full in 2025-26.
- The Education Other Than at School budget had an under spend of £97,000, mainly due to staff vacancies.

Early Years and Young People Group

- There is an under spend of £528,000 which has improved by £320,000 from the projected under spend of £208,000 reported at quarter 3.
- The quarter 3 under spend primarily related to a restructure within the Education Welfare Service (£136,000) combined with staff vacancies being held across the Bridgend Youth Service and Education Engagement Team budgets. These posts are being recruited to in 2025-26.
- The improved position is primarily due to additional grant funding - Local Authority Standards Early Years Non-maintained Settings (£49,000), Local Authority Reform ALN (£14,000), Whole School grant (£230,000), Attendance grant (£130,000) and Youth Endowment Fund (YEF) (£14,000) and maximisation of grant funding (Youth Justice Board (£23,000), YEF (£36,076) and Whole School grant (£54,000) in quarter 4.
- Council approved a budget pressure of £141,000 for 2025-26 to assist the youth justice service to reduce youth offending and provide vital support to young people affected by trauma.

Home-to-school transport (HtST)

- Council approved a £1.2 million budget pressure for 2024-25 as part of the Medium Term Financial Strategy to address the increased HtST costs experienced in 2023-24.
- Despite this budget growth in 2024-25, further retendering exercises in September 2023 resulted in additional costs of £572,000 on HtST budgets in 2024-25.
- The service has also seen an increase in demand for transporting pupils individually due to challenging behaviour and an increase in pupils with ALN requiring transport provision based on the learner's needs assessment. Along with a number of contractors handing back contracts and having to re-tender at higher cost, these pressures have added a further increase in costs in 2024-25 of £244,000.
- These pressures were partly mitigated due to in-year tenders being issued with a price cap resulting in a significant cost saving for the service area, which saw the overall projected over spend decreasing from £1.277 million at quarter 1 to £571,000 at quarter 3.
- The improved position at year end to an overall under spend on the HtST budgets of £80,000 is primarily due to £540,000 of funding being allocated in quarter 4 from the WG cost pressures grant. Without this one-off funding the service would have been over spent by £460,000.
- Council has approved a budget pressure of £539,000 for HtST for 2025-26 as part of the MTFS.

Catering Services

- There is an under spend of £661,000 on catering services in 2024-25. This is primarily due to the continued roll out of the Universal Primary Free School Meals (UPFSM) by Welsh Government and the accompanying grant funding to support the initiative.
- The second half of 2024-25 saw a significant increase in the number of UPFSM provided with year 6 being introduced to the scheme from September onwards which positively impacted on the outturn position. 397,171 meals were served in the first six months, increasing to 624,765 in the last six months of 2025-26.
- The service also benefited from an administration element of the grant (£85,196).
- The provision of UPFSM in 2025-26 will continue to be monitored closely to determine whether the positive outturn position achieved in 2024-25 could be proposed as a future MTFS budget reduction proposal.

Historic pension and redundancy costs

- The £736,000 over spend is primarily due to the cost of redundancies in schools being met centrally where they met current or future MTFS savings targets.
- In 2024-25 10 Primary schools were supported with 23 redundancies (£540,000) and 2 secondary schools were supported with 7 redundancies (£259,000)
- There has been a small offsetting reduction in these costs from historic employee pension costs – there will be an incremental reduction each year as members pass away.

3.3.2 **Social Services and Wellbeing Directorate**

The net budget for the Directorate for 2024-25 was £109.463 million and the actual outturn was £109.952 million following draw down of £1.512 million from earmarked reserves, resulting in an over spend of £489,000. This is compared to a projected over spend position of £2.796 million at quarter 3. The main reasons for the reduction in the over spend include a number of one-off grants awarded since quarter 3 and maximisation of existing grants across the service including WG grant to support additional revenue cost pressures (£935,000), Children and Communities grant (£349,000), Housing Support grant (£265,000), 50 Day Winter Challenge grant (£428,000) and a further £176,000 of Shared Prosperity Funding (SPF). Without this additional funding, the Directorate would have over spent by £2.642 million.

The most significant variances for the directorate are:

SOCIAL SERVICES AND WELLBEING DIRECTORATE	Net Budget £'000	Actual Outturn £'000	Actual Variance Over/(under) budget £'000	% Variance
Adult Social Care	72,730	72,541	(189)	-0.26%
Prevention and Wellbeing	6,547	6,027	(520)	-7.94%
Childrens Social Care	30,186	31,384	1,198	3.97%

Adult Social Care

There is a net under spend of £189,000 on the Adult Social Care budget, an improvement of £938,000 from the £749,000 over spend projected at quarter 3.

The most significant variances contributing to the under spend are:

ADULT SOCIAL CARE	Actual Variance Over/(under) 2024-25 £'000
Mental Health Homecare	559
Learning Disabilities Residential Care	448
Physical Disability/Sensory Impairment Home Care	312
Older People Direct Payments	193
Physical Disability/Sensory Equipment	195
Learning Disabilities Homecare	172
Learning Disabilities Day Opportunities	171
Older People Supported Accommodation	163
Physical Disability/Sensory Impairment Residential Care	100
Homes for Older People	72
Mental Health Supported Accommodation	(193)
Assessment and Care Management	(194)
Learning Disabilities Direct Payment	(364)
Older People Home Care	(1,199)

- Mental Health Homecare – this includes supported living, short breaks and domiciliary care, with the service experiencing increased needs of people with supported living packages of care. There has been a slight reduction in the over spend reported at quarter 3, from £579,000 to £559,000 at quarter 4. A budget pressure of £697,000 has been approved by Council for 2025-26 to mitigate this pressure.

- Learning Disabilities Residential Care – there is an over spend of £448,000, which is comparable to the £454,000 over spend projected at quarter 3. The underlying reason for the over spend is increased costs for existing placements within the residential and nursing service due to changing needs.
  A budget pressure of £438,000 has been approved by Council as part of the MTFS for this service for 2025-26.

- Physical Disability/Sensory Impairment Home Care - there is an over spend of £312,000, which has increased from the £167,000 projected over spend at quarter 3. Following clarification of terms and conditions of funding, £107,000 of one-off grant from the 50 Day Winter Challenge Funding originally allocated against this service area in quarter 3, has now been moved to Older People services. The over spend is based on the current demand for the service, which is 100 packages of support at the end of March 2025. A budget pressure of £274,000 has been approved by Council as part of the MTFS for 2025-26 to mitigate this pressure.

- Older People Direct Payments – there is an over spend of £193,000 across the Direct Payments budgets in this area. The main reason for the over spend is the increasing complexity of cases that impact on the average cost of direct payments support. The over spend has reduced by £101,000 since quarter 3 due to further packages being removed from projections where activity had ceased for longer than six months, along with increases in account reimbursements received. A budget pressure of £369,000 has been approved by Council as part of the MTFS for 2025-

26 with ongoing close monitoring of account reimbursements to ensure the full budget pressure is required.

- Physical Disability/Sensory Equipment – there is an over spend of £195,000, a reduction of £42,000 from the quarter 3 projected over spend of £237,000. The over spend is partly due to an increase in the expected contribution to the community equipment pooled fund (£84,000) with the remainder being due to increases in demand for small works and adaptations and aids to daily living. This is a fluctuating demand led budget which varies month by month and for which a budget pressure of £266,000 has been approved by Council for 2025-26.

- Learning Disabilities Homecare – there is an over spend of £172,000, compared to the projected over spend of £218,000 at quarter 3. While the over spend is mainly due to increases in staffing costs for the internal Homecare service due to having to cover staff sickness (£243,000), this is partly offset by under spends in the external Homecare service (£56,000). A budget pressure of £325,000 has been approved by Council for 2025-26.

- Learning Disabilities Day Opportunities - the over spend of £171,000 has reduced by £488,000 since quarter 3. This is due to additional Welsh Government revenue cost pressure grant awarded since quarter 3 of £435,000. Without the additional grant income, the over spend would have been £530,000. The over spend relates mainly to placement numbers exceeding the available budget for external day services in addition to increased transport costs (£157,589) which remain at a comparable level to quarter 3. The underlying reason for the over spend continues to be that whilst the learning disabilities home care budget continues to over spend as people have not returned to internal day services, older people are taking up the vacant day services placements. The service cannot be reduced until alternative models of day time support and occupation have been developed following a review which is underway. The new transport policy was approved by Cabinet in April 2025 and went live on 1st May 2025 which should impact positively on the increased transport costs incurred in 2024-25. A £438,000 budget pressure has been approved by Council for 2025-26 for this service as part of the MTFS.

- Older People Supported Accommodation – there is an over spend of £163,000 compared to a projected over spend of £190,000 at quarter 3. This over spend is based on the current demand for the service. For 2025-26 a budget pressure of £201,000 has been approved by Council as part of the MTFS.

- Physical Disability/Sensory Impairment Residential care – there is an over spend of £100,000 which is comparable to the projected over spend of £109,000 at quarter 3. The overspend is due to higher placement numbers than budget.

- Homes for Older People – There is an overspend of £72,000 compared to a projected under spend of £524,000 at quarter 3. The over spend is mainly due to increased residential/nursing placement costs which has increased by £678,000 since quarter 3.

- Mental Health Supported Accommodation – The under spend of £193,000 primarily relates to under spends on staffing budgets. The under spend is comparable to the projected underspend at quarter 3, which was mainly due to staff vacancies being held for the short term.

- Assessment and Care Management – there is a under spend of £194,000 on directorate wide assessment and care management budgets, an increase from the quarter 3 projected under spend of £69,000. Since quarter 3 there has been a reduction in staffing costs of £80,000 plus an additional £52,000 grant received due to maximisation of grants – including the 50 day Winter challenge, Social Care Workforce grant and Integration and Rebalancing Care funding. There continues to be a need for agency cover across this area due to demands in the system particularly linked to supporting the acute hospital and timely discharges and the complexity of court protection work in learning disabilities. A plan to permanently recruit and step down agency in a timely way is being implemented.

- Learning Disabilities Direct Payments – there is a under spend of £364,000 across the Direct Payments budgets in this area compared to a projected under spend of £58,000 at quarter 3. Detailed reviews are being undertaken of all direct payment cases, with packages being removed from projections where support has ceased for longer than six months. Account reimbursements have also exceeded budget.

- Older People Home Care – There is a under spend of £1.119 million, an increase from the quarter 3 projected under spend of £852,000. Since quarter 3, this area has received £336,000 of additional grant income, mainly £298,000 of the Welsh Government 50 day Winter Challenge funding. The under spend still primarily relates to under spends on staffing budgets as a result of the remodelling of the Support at Home services into locality based areas and the increase in numbers of people supported through short term reablement packages. Agency staff have been utilised to supplement the workforce where available. However, this has been offset by an over spend on external domiciliary care placements due to complexities of people’s needs and increased packages of support.

Prevention and Wellbeing

- There is an overall under spend of £520,000 within Prevention and Wellbeing. This has increased by £131,000 since quarter 3. The underspend is mainly due to maximisation of grant funding from the Shared Prosperity Fund (£427,000) and other smaller grants across the service (£80,000).

- The following MTFS savings were not fully achieved in 2024-25:
    - SSW7 – review opportunities to amend the current energy payment arrangements for the leisure contract - £45,000 shortfall.
    - SSW13 – Council to reduce its investment into cultural services - £295,000 shortfall. While the saving was only partly achieved the shortfall was mitigated with Shared Prosperity funding so that the saving was met in the short term. Further reports will be presented to Cabinet to enable the outcome of consultation exercises to be taken into account when finalising any proposed changes to investment into cultural services to meet the MTFS saving.

Children's Social Care

There is a net over spend of £1.198 million on the Children's Social Care budget which is a decrease on the projected net over spend of £2.436 million at quarter 3. The improved position is due primarily to the additional one off grant funding received in quarter 4 - Welsh Government revenue cost pressure (£500,000) and maximisation of Housing Support grant (£169,000).

The most significant variances contributing to this over spend are:-

CHILDREN'S SOCIAL CARE	Actual Variance Over/(under) 2024-25 £'000
Care Experienced Children	3,699
Commissioning & Social Work	(855)
Early Help & Edge of Care	(828)
Other Child & Family Support Services	(387)
Family Support Services	(260)
Management and Admin	(172)

- The over spend of £3.699 million for Care Experienced Children is due to a combination of factors:-

    - The Independent Residential Care budget has an over spend of £3.326 million which has decreased by £369,000 since quarter 3. The over spend is based on the number of care experienced children in independent residential placements which is currently 24 placements (including 38 week residential and Operating Without Registration (OWR) placements), an increase of 1 since quarter 3. The underlying over spend position is due to the number in independent residential placements exceeding the budget which covers between 6-8 placements depending on the unit cost. In addition there continues to be insufficient in-house foster carer placements to meet needs and children requiring specialist provision, sometimes with high staffing ratios to keep them safe and protected. It should be noted that this budget area can be volatile and small changes in demand can result in very high costs being incurred. Since quarter 3 there has been additional one off revenue grant awarded from WG to support additional cost pressures of £500,000, plus an additional £136,000 of Social Care Workforce Grant. Without these grants the over spend would have been £3.962 million. Council approved £3.250 million budget pressure for 2025-26 as part of the Medium Term Financial Strategy, to address ongoing pressures of Care Experienced Children and insufficient numbers of foster carers.
    - There is an over spend of £8,938 on the Independent Fostering Agency (IFA) budget, compared to the quarter 3 projected underspend of £135,000. The reason for the move to an over spend position is an increase of 3 placements since quarter 3. This is due to alternative, lower cost, placement options being fully utilised, including Special Guardianship Orders. It should be noted, however, that some of the children in costly independent residential provision would ideally be with foster carers who can manage complex

needs. There is insufficient capacity in-house and in IFAs which means that some children's needs are being met in a higher, more expensive, tier of service.

  - Children's Internal Residential Care has an over spend of £220,000, which is an increase of £32,000 since quarter 3. This is due to increased usage of agency workers to address safeguarding issues which require additional staffing across the service. Since quarter 3, £72,000 additional Eliminating Profit grant has been awarded specifically for the Hillsboro residence.
  - Other Looked After Children's Services has an over spend of £167,000, which is a decrease of £245,000 from the projected over spend of £411,00 at quarter 3 due to maximisation of the Housing Support Grant in quarter 4 (£198,000).

- Commissioning and Social Work – There is an under spend of £855,000 which has improved since the quarter 3 projected under spend of £678,000. The increase in under spend is mainly due to additional grant funding being received - Shared Prosperity Fund (£83,000) and Eliminating Profit grant (£107,000). There has also been a reduction in spend on agency staff by £39,000. In addition, there has been further reductions in staffing costs due to the current vacancies across the service (£94,000).

  There remains an over spend in care and support and placement costs across the service area of £215,000 – this has reduced from the projected over spend of £338,000 at quarter 3. The majority of the over spend relates to Care Experienced Children/care support spend such as court mandated drug testing, assessments, reports, travel and therapy costs over which the service has no discretion but to secure against a very limited budget.

- Early Help & Edge of Care – During quarter 3, £1.773 million of the Early Help Services budget was transferred from EEYYP to the SSWB directorate in line with the 3 year sustainability plan approved by Council to improve outcomes for Children and Family Services in Bridgend. £500,000 of this budget related to a budget pressure approved by Council in February 2024 to strengthen the Council's statutory safeguarding accountabilities, specifically for Early Help and Edge of Care. At quarter 3 there was a projected under spend of £266,000 against this budget pressure as a review of the service is currently underway. In addition, during quarter 4 additional Regional Integration Funding was received (£81,000) and the Children and Communities grant was also maximised (£382,000), increasing the under spend at year end to £828,000.

- Other Child & Family Support Services – There is a under spend of £387,000 which is due to reduced costs for the Regional Adoption service based on current placements made across the region.

- Family Support Services has an underspend of £260,000 compared to a projected under spend of £134,000 at quarter 3. Direct payment reimbursements during 2024-25 have exceeded budget.

- Management & Administration – there is an under spend of £172,000 which is comparable to what was reported at quarter 3. The underlying under spend is primarily due to other staff vacancies in this service area which are contributing to the 2024-25 MTFS vacancy management factor of £255,000 for the SSWB directorate.

3.3.3 **Communities Directorate**

The net budget for the Directorate for 2024-25 was £33.271 million and the actual outturn was £33.590 million following draw down of £1.771 million from earmarked reserves, resulting in an over spend of £319,000. This is compared to a projected over spend position of £825,000 at quarter 3. The main reason for the reduction in over spend since quarter 3 is a one-off rates rebate within Corporate Landlord (£682,000) and maximisation of SPF grant (£182,000).

The main variances are:

COMMUNITIES DIRECTORATE	**Net Budget £'000**	**Actual Outturn £'000**	**Actual Variance Over/(under) budget £'000**	**% Variance**
Fleet Services	180	744	564	313.33%
Highways Services (DSO)	3,366	3,768	402	11.94%
Waste Collection & Disposal	11,181	11,385	204	1.82%
Planning and Development	706	871	165	23.37%
Strategic Regeneration	962	745	(217)	-22.56%
Economy, Natural Resources and Sustainability	1,489	1,242	(247)	-16.59%
Corporate Landlord	3,355	2,830	(525)	-15.65%

Fleet Services

- There is an over spend of £564,000 on Fleet Services which is slightly worse than the £500,000 projected over spend at quarter 3.
- As previously reported the fleet services team operate on a break-even basis with re-charges for work undertaken on directorates, South Wales Police (SWP) and the general public's vehicles, generating income to support staffing and overhead costs. Productivity levels have been further impacted by long term sickness and ongoing difficulties with recruitment and retention. A market supplement has been introduced for HGV technicians, in line with the corporate Market Supplement Policy, following comparisons with neighbouring authorities, which has only seen limited success in filling vacancies. A review outlining options for service operating models to mitigate the budget position of fleet services had been delayed due to officer availability but is now proceeding.

Highways Services

- The over spend of £402,000 is partly due to storm damage costs incurred in responding to Storm Bert and Darragh (£160,000). Transport costs have also been higher (£150,000) due to the service having to hire vehicles on a short term basis whilst consideration was given to longer term capital purchases. On 12 March 2025, Council approved a capital budget of £1.2 million to be included in the Capital programme, to be funded from prudential borrowing, to enable the Fleet Replacement Programme to continue.

Waste Collection and Disposal

- There is a net over spend on the Waste Collection and Disposal budget of £204,000 which has improved marginally from the net projected over spend of £216,000 reported at quarter 3. The main underlying pressures on the waste budget include:-

- The continued delay in the achievement of the 2022-23 MTFS saving, COM 2 – Relocation of Community Recycling Centre from Tythegston to Pyle resulting in cessation of lease payments at the existing site. Whilst the new site opened in quarter 4 of 2023-24 the timing of the opening meant that the full saving could not be achieved in 2024-25 as the exit terms of the lease needed to be finalised (£60,000 shortfall).
- Increase in subscribers for the Absorbent Hygiene Products (AHP) service. The AHP service has been promoted to further improve the recycling levels achieved in Bridgend which also mitigates the risk of fines imposed by WG if local authorities do not meet their recycling targets. It has seen an increase of 35% since the start of the 2022-23 financial year. Council have approved a £66,000 budget pressure for the AHP service for 2025-26.
- Decrease in income due to the reduction in the price of recycled materials since quarter 2 (£42,000).
- Shortfall of £129,000 on Trade Waste black bag income due to increased recycling being undertaken by businesses due to the change in law in Wales in April 2024 for all businesses, charities and public organisations to sort their waste for recycling.

<u>Planning and Development</u>

- The over spend of £165,000 is primarily due to a downturn in planning application income. Fee income is subject to considerable fluctuations between years, depending on number and types of applications.

<u>Strategic Regeneration</u>

- The under spend of £218,000 has improved since the projected under spend of £86,000 reported at quarter 3. This is primarily due to maximisation of SPF grant funding (£53,000), and additional Welsh Government Transforming Towns grant (£29,000) with the remainder due to ongoing staff vacancies.

<u>Economy, Natural Resources and Sustainability</u>

- The under spend of £247,000 has improved since the projected under spend of £98,000 reported at quarter 3. This is primarily due to maximisation of SPF grant funding (£129,000) and an under spend on non-staffing budgets (£40,000).

<u>Corporate Landlord</u>

- There is a net under spend of £525,000 against Corporate Landlord which has improved from the projected over spend of £252,000 reported at quarter 3.
- The main reason for the improved position is a one-off rates rebate on Council buildings of £682,000 due to backdated revaluations undertaken by the Valuation Office Agency. Without the rebate, Corporate Landlord would have over spent by £157,000 in 2024-25.
- There continues to be shortfalls in income (£405,000) generated from properties run by the Council that relate to occupancy shortfalls which have continued into 2024-25.
- The shortfall against Bridgend Market of £253,000 is due to the identification of Reinforced Autoclaved Aerated Concrete (RAAC) and the subsequent closure of the market and loss of rental income.
- There is also a shortfall in income of £146,000 for the Innovation Centre.
- Council approved a budget pressure of £405,000 for 2025-26 to address shortfalls in income on the property portfolio as part of the MTFS.

- As noted in section 3.2.2 the £50,000 target for 2022-23 and the £120,000 target for 2023-24 in relation to MTFS proposals to seek to commercially let out wings of Ravens Court were not achieved. In addition, there was a further £73,000 MTFS saving across the estate budgets for 2024-25 in relation to office rationalisation which has also not been achieved. The shortfall against the savings targets added a further £243,000 pressure on the Corporate Landlord estates' budget in 2024-25.
- Corporate Landlord sold the Freehold of Ravens Court in the final quarter of 2024-25 which will mitigate these MTFS shortfalls going into 2025-26.
- The over spend in Corporate Landlord has been partially mitigated in 2024-25 by staff vacancies of £230,000.

3.3.4 **<u>Chief Executive's</u>**

The net budget for the Directorate for 2024-25 was £23.578 million and the actual outturn was £25.492 million following draw down of £1.537 million from earmarked reserves, resulting in an over spend of £1.914 million. This is comparable to the projected over spend of £1.922 million reported at quarter 3. Since quarter 3 there has been additional grant funding confirmed for ICT Connecting Care grant (£304,000) and Housing and Homelessness (Ukrainian grant - £255,000 and Afghan Resettlement grant - £198,000). Without this additional funding, the Directorate over spend would have been £2.671 million.

The main variances are:

CHIEF EXECUTIVE'S	Net Budget £'000	Actual Outturn £'000	Actual Variance Over/ (under) budget £'000	% Variance
ICT	4,074	4,786	712	17.5%
Legal, Democratic & Regulatory	5,851	6,194	343	5.9%
Housing & Homelessness	3,552	3,826	274	7.7%
Partnerships	2,275	2,502	227	10.0%
Finance	4,076	4,300	224	5.5%

<u>ICT</u>

- There is an over spend of £712,000 across ICT budgets which has increased by £420,000 since quarter 3.
- The over spend is primarily due to the shortfall of £339,000 against the MTFS saving CEX 22 – Review of ICT services. The full saving is anticipated to be met in 2025-26 due to a re-procurement exercise that has been undertaken on telephony services. An exercise is due to be undertaken based on the outturn position of service department telephone budgets to permanently re-align budgets which will partly mitigate the over spend in ICT in 2025-26.
- In addition, due to reduced printing activity ICT have been unable to recover the fixed costs of printers and photocopiers through the re-charge to service departments. Consequently reduced spend has been incurred on printing budgets across the service departments and the ICT service has received less income. An exercise is due to be undertaken based on the outturn position of service department print budgets to permanently re-align budgets which will further mitigate the over spend in ICT in 2025-26.

- There has been additional one-off grant income received from WG in quarter 4 to support the replacement costs for the WCCIS system project called Connecting Care (£304,000). Without this grant the ICT over spend would have been £1.016 million.

Legal

- There is an over spend of £343,000 across Legal, Democratic and Regulatory services, which has reduced by £274,000 since quarter 3.
- There is an over spend on staffing budgets within Legal services of £98,000, which is partly due to the timing of the implementation of the MTFS proposal CEX13 – restructure of Legal Services (£60,000) and also due to use of agency staff to cover vacant posts across the service.
- The Registrars service has an over spend of £34,000 due to the MTFS saving proposal CEX12 being partly achieved (£28,000 shortfall) due to a reduction in the number of ceremonies delivered in 2024-25.
- Regulatory Services (Licencing, Public Health) has an over spend of £92,000 which has reduced since the quarter 3 projected over spend of £142,000. This over spend is primarily due to the under recoupment of income for taxi examination, licence fees and environmental health recharges (£68,000). Whilst a similar shortfall was experienced in 2023-24 it was offset by a £74,000 refund being received in relation to the Shared Regulatory Service.
- The balance of the over spend is due to legal fees. Whilst Council approved £300,000 in 2024-25 to support the increase in legal fees being experienced, the complex cases requiring King's Counsel have continued. Council has approved a further budget pressure of £200,000 for 2025-26, as part of the MTFS to address ongoing pressures on litigation cases.

Housing & Homelessness

- There is a net over spend of £274,000 on Housing & Homelessness which is a reduction of £136,000 compared with the projected over spend of £411,000 reported at quarter 3.
- The overall budget for housing and homelessness was reduced by £645,000 in 2024-25 due to MTFS budget reduction proposals. **Appendix 2** highlights that all of these were achieved in 2024-25.
- For 2024-25, Welsh Government (WG) initially provided grant funding of £915,000 for accommodation under the "No One Left Out" funding stream, £198,000 under a Discretionary Homelessness Prevention Grant, £60,000 Strategic Coordinator grant and £86,000 Ukrainian grant. During quarter 4 WG increased the Ukrainian grant funding by £255,000. The total revised grant funding confirmed from WG for housing and homelessness services for 2024-25 was £1.514 million which is comparable to the total grant allocation of £1.505 million received in 2023-24. £1.369 million of the grant funding covers homelessness accommodation costs and £145,000 is utilised towards Homeless Spend to Save support, e.g. funding bonds for rental properties.
- Spend on Homelessness accommodation for 2024-25 was £4.3 million, a reduction of £100,000 since the £4.4 million projected at quarter 3. The key factor in this reduction is the purchase of Houses in Multiple Occupation (HMO) stock as well as utilising an existing BCBC property with the opening of Maple Tree House (previously Children's Residential Home), enabling a reduction in the use of more expensive options such as tourism style properties.
- As well as the core budget (£2.174 million) and total WG accommodation grant funding (£1.514 million), the service has also seen an increase in rental income

relating to Housing Benefits claimed by tenants who have been supported with homelessness accommodation (£519,000). The net impact is an overall under spend on accommodation in 2024-25 of £93,000.

- The Council has seen a significant increase in the provision of temporary accommodation. At the end of 2019-20, the Council was providing temporary accommodation to 83 households. At the end of March 2025 this had increased to 261 households, representing a 214% increase over this period. The wider demand for social housing from those in housing need has also increased. At the end of 2019-20 there were 816 households registered on Bridgend's Common Housing Register. At the end of March 2025 this number had increased to 3,284 households.
- Due to the uncertainty of levels of WG grant funding going forward, Council approved a £400,000 budget pressure for Housing and Homelessness for 2025-26 as part of the MTFS.
- There is an over spend of £756,000 on Disabled Facility grants. This over spend has increased by £530,000 since quarter 3 due to a revenue contribution to capital to fund an over spend on capital works due to the high number of schemes completed in 2024-25. This has been offset by under spends on the Brynmenyn Homeless Centre (£129,000) due to an increase in Housing Benefit income levels, staff vacancies (£40,000), maximisation of Supporting People grant (£82,000) and additional grant funding received during quarter 4 from the Home Office for the Afghan Resettlement scheme (£198,000).

<u>Partnerships</u>

- There is an over spend of £227,000 in Partnerships. This is mainly due to MTFS saving proposals for 2024-25 not being fully achieved.
- CEX 8 Charging for PEST control services – shortfall of £32,000. This is due to a reduced uptake of the service which has resulted in a reduction in income received for 2024-25.
- CEX 23 Review the provision of Partnerships and Customer Services shortfall of £61,000 due to delays in confirmation of alternative funding for two posts.
- The remainder is due to an over spend in the Community Safety Partnerships team due to additional staffing costs to support the Assia Domestic Abuse Service team (£77,000).

<u>Finance</u>

- There is a net over spend of £224,000 across Finance, a reduction of £27,000 since quarter 3. The over spend is primarily due to a reduction in court cost income and a shortfall in the Department for Work and Pension (DWP) subsidy contributions towards housing benefit payments in Bridgend. Any Housing Benefit award paid over the subsidy level is borne by the Council as the DWP does not fully fund all Housing Benefit expenditure – for example there are a number of tenancy arrangements whereby the subsidy is limited to historic local housing allowance rates or restricted by rent officer determinations. Council have approved a budget pressure of £158,000 towards the shortfall in DWP subsidy contributions for 2025-26 as part of the MTFS.
- The balance is mainly due to the shortfall against CEX 25 – staff savings from Finance senior management (£70,000).

3.3.5 **Council Wide budgets**

This section includes budgets, provisions and services which are council wide, and not managed by an individual directorate. The net budget for 2024-25 was £45.536 million and the actual outturn was £30.408 million, resulting in an under spend of £15.128 million.

The most significant variances were:-

COUNCIL WIDE BUDGETS	Net Budget £'000	Actual Outturn £'000	Actual Variance Over/(under) budget £'000	% Variance
Capital Financing	6,907	1,351	(5,556)	-80.4%
Council Tax Reduction Scheme	16,054	16,326	272	1.69%
Insurance	1,363	(426)	(1,789)	131.3%
Other Corporate Budgets	10,023	2,254	(7,769)	-77.5%

Capital Financing

- The under spend of £5.556 million mainly relates to a change in the Minimum Revenue Provision Policy approved by Council on 23rd October 2024. The impact in the current year is an under spend on the MRP budget of £2.054 million.

- The balance of the under spend is due to additional interest earned on our investments due to higher interest rates experienced in recent years. Rates started to fall from the high of 5% in November 2024 and have fallen again since, to the current rate of 4.25%. Further interest rate reductions are expected, however the timing of these are uncertain and are subject to economic factors and in particular the position of inflation against the Bank of England's 2% target.

Council Tax Reduction Scheme

- There is an over spend of £272,000 on the Council Tax Reduction Scheme. This is a demand led budget and take-up is difficult to predict. Take-up for 2024-25 is higher than in 2023-24 when the gross spend in this budget area was £15.566 million, which is mainly as a consequence of the 9.5% increase in council tax in 2024-25.
- Council approved a £1 million budget pressure for 2025-26 as part of the MTFS taking the budget up to £17.054 million.

Insurance

- There is an under spend of £1.789 million on the insurance budget. This primarily relates to a £1.517 million reduction in the overall fund liability following a number of claims being repudiated or discontinued, particularly in relation to Japanese Knotweed, as well as those settled at a lower amount or claims won. In addition, as part of the Maesteg School Partnership PFI, the annual Insurance Review has resulted in a one-off exceptional saving of £264,146 which has been refunded to the Council. The outturn for 2024-25 is considered to be a one-off under spend, as it is an adjustment to the fund liability provision required and has not impacted the annual premiums, however the budget will continue to be reviewed going forward to determine if there are any permanent budget reduction opportunities.

Council Wide Budgets

- There is an under spend of £7.769 million on Council wide budgets. The main areas contributing to this under spend are:-

  - During quarter 3 Welsh Government provided a grant of £937,539 towards the teachers' pay award 2024-25 and £2,352,854 toward NJC pay pressures that were not anticipated at budget setting. This has released centrally held funding and positively impacted on the outturn for Council wide budgets by £3.290 million.
  - Inflation rates remained low throughout 2024-25, and remained below the 3.8% rate when the budget was set. In addition, energy prices reduced further than anticipated in 2024-25. Consequently there is an under spend on the price inflation budget due to a reduction in requirements to allocate price inflation to service areas in-year. There is ongoing uncertainty on energy cost increases in 2025-26 and the general trajectory of CPI, therefore it is prudent to maintain a similar level of price inflation funding for 2025-26.
  - As part of the MTFS 2024-28, £1.558 million was set aside towards emerging budget pressures and as a contingency against non-deliverability of budget reduction proposals. Only £87,000 was allocated during 2024-25, resulting in an under spend of £1.543 million. This was agreed as a Council wide budget reduction proposal for 2025-26 as part of the MTFS.

3.3.6 **Council Tax Collection**

- The outturn for 2024-25 shows additional income of £611,208 has been collected compared to the budget (+ 0.17%). In respect of income collected from the levying of premiums on long term empty properties and second homes, £547,253 was collected from the premium charge for long-term empty properties and £163,080 was collected from premiums on second homes. Without this additional funding the core Council tax collected in 2024-25 fell short of the budgeted income by £99,125.

3.4 Review of Earmarked Reserves

3.4.1 The Council is required to maintain adequate financial reserves to meet the needs of the organisation. The MTFS includes the Council's Reserves and Balances Protocol which sets out how the Council will determine and review the level of its Council Fund balance and earmarked reserves. During 2024-25 Directorates drew down funding from specific earmarked reserves and these were reported to Cabinet through the quarterly monitoring reports. The final draw down from revenue reserves was £5.397 million and is summarised in **Table 4** below. A more detailed breakdown of the movement on all reserves is outlined in **Appendix 4**.

Table 4 – Revenue draw down from Earmarked Reserves during 2024-25

	Revenue draw down from Earmarked Reserves 2024-25 £'000
Education, Early Years and Young People	577
Social Services & Wellbeing	1,512
Communities	1,771
Chief Executives	1,537
Total	**5,397**

3.4.2 The net under spend position of £13.363 million for 2024-25, as set out in **Table 1** and 3.1.6, has enabled new net earmarked reserves of £13.063 million to be created at year end along with a transfer of £300,000 to the Council Fund (see paragraph 3.4.5).

3.4.3 The most significant new earmarked reserves were:- £6.875 million to fund new capital projects (details of schemes to be determined), £1.5 million to support Change Management initiatives to support future invest to save projects, including digital transformation projects, £1 million to provide support for behavioural issues in schools, £150,000 to provide additional capacity to manage planning applications and £150,000 to support youth services.

3.4.4 **Table 5** below summarises the final position on all revenue useable reserves for the year, including the Council Fund. In addition there are currently £46.038 million of other earmarked reserves funding schemes within the capital programme.

Table 5 – Summary of Movement on Revenue Earmarked Reserves 2024-25

Opening Balance 01-Apr-24 £'000	Reserve	Movement at Quarter 4			Closing Balance 31 March 2025 £'000
		Additions £'000	Reclassification £'000	Drawdown/Unwound £'000	
9,730	**Council Fund Balance**	**300**	**0**	**0**	**10,030**
10,695	Corporate Reserves	4,241	(568)	(2,382)	11,986
6,668	Directorate Reserves	4,789	942	(4,822)	7,577
4,005	Equalisation & Grant Reserves	687	(914)	(890)	2,888
2,405	School Balances	0	0	(3,024)	(619)
23,773	**Total Earmarked Reserve**	**9,717**	**(540)**	**(11,118)**	**21,832**
33,503	**Total Useable Reserves**	**10,017**	**(540)**	**(11,118)**	**31,862**

3.4.5 In terms of financial reserves, the Council Fund balance has been increased by £300,000 and now represents 2.78% of the net revenue budget for 2024-25, or 4.0% of the net revenue budget excluding schools. As budgets incrementally increase annually, it is challenging to keep the Council Fund balance in line with MTFS Principle 9 which states that:-

The Council Fund balance should be set at a prudent but not excessive level. This will normally be maintained at a level of 5% of the Council's net budget, excluding schools.

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

4.1 The protected characteristics identified within the Equality Act 2010, 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 Act provides the basis for driving a different kind of public service in Wales, with 5 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. The allocation of budget determines the extent to which the Council's well-being objectives can be delivered. 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 direct implications arising from this report.

7. Safeguarding and Corporate Parent Implications

7.1 There are no direct implications arising from this report.

8. Financial Implications

8.1 These are reflected in the body of the report.

9. Recommendation

9.1 Council is recommended to:

- note the revenue outturn position for 2024-25.

Background documents: Individual Directorate Monitoring Reports

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PRIOR YEAR BUDGET REDUCTIONS CARRIED FORWARD INTO 2024-25

RAG STATUS KEY	
RED	Not likely to be achieved **at all** in this financial year or less than 25%.
AMBER	Reduction not likely to be achieved in full in financial year but greater than 25%
GREEN	Reduction likely to be achieved in full

Ref.	Budget Reduction Proposal		Original Reduction and RAG £000	Revised RAG £000	Total amount of saving achieved in 24-25 £000	Reason why not achieved	Proposed Action in 2025-26 to achieve
EDUCATION, EARLY YEARS AND YOUNG PEOPLE							
EDFS1 (2023-24)	Delegate some school transport responsibilities to The Bridge Pupil Referral Unit under a new delivery model to deliver efficiency savings		40		40	During 2023-24 officers investigated the practicalities and implications of a bespoke transport arrangement for the Bridge Alternative Provision. It was determined that without capital investment to purchase a vehicle and additional staff resources that the proposal was not possible to be delivered. The transport budget for The Bridge was re-instated to 2022-23 levels. Since September 2023, the approach taken in relation to supporting Post 16 learners with college passes has been changed, with the £40K savings now made on the Post 16 transport budget.	No further action required in 2025-26.
	Total Education, Early Years and Young People		**40**		**40**		
COMMUNITIES							
COM 2 (2021-22)	Re-location of Community Recycling Centre from Tythegston to Pyle resulting in cessation of lease payments at existing site		60		0	The new site opened during quarter 4 of 2023-24. The timing of the opening meant that exit terms of the lease were being finalised in 2024-25. Once these have been finalised, the full saving will be made.	Once the exit terms have been finalised, the full saving will be made. The service will endeavour to meet any shortfall in the saving through alternative one off efficiencies in 2025-26 to deliver a balanced budget position.
COM 3 (2022-23)	Change the composition of Household Food Waste Bags		35		35	The budget reduction proposal was delayed in 2023-24 until the outcome of national research had been completed to ensure any potential changes in legislation did not impact on this proposal. The new waste contractors from 1st April 2024 implemented the change of composition, therefore the saving was made in full during 2024-25.	No action required - saving made in full in 2024-25
COM 4 (2022-23)	Remove Business in Focus from running Enterprise Centres in Bridgend		20		0	Review of Business in Focus operating model explored to identify operating efficiencies with a view to restructuring the management agreement with Business in Focus to deliver this saving.	Review ongoing at the start of 2025-26. Any shortfall in the saving achieved in 2025-26 will be mitigated by savings within the wider Corporate Landlord service area.
COM 5 (2022-23)	Commercially let a wing of Ravens court to a partner organisation or business		50		0	Building was not commercially let during 2024-25.	Sale of the freehold took place in the final quarter of 2024-25 which will enable the savings to be realised in full going into 2025-26.
COM 1 (2023-24)	Closure of each of the Community Recycling Centre sites for one weekday per week		50		50	Public consultation on this proposal was held between 30 June and 12 September 2023, with the outcome reported to Cabinet on 21 November 2023, when the proposal was approved. A marginal saving was made in 2023-24 with the full saving being realised in 2024-25.	No action required - saving made in full in 2024-25
COM 2 (2023-24)	Charging Blue Badge Holders for parking		40		0	The traffic management team were engaged in the introduction of the default national speed limit in built up areas in 2023-24. A staff member commenced work on this proposal in 2024-25 and it is currently at initial consultation stage. It requires a full order making process which is typically 6-9 months.	Shortfalls against this savings target will be met through one off efficiencies in 2025-26 to deliver a balanced budget position.
COM 3 (2023-24)	Commercially let two wings of Ravens court to a partner organisation or business		120		0	Building was not commercially let during 2024-25.	Sale of the freehold took place in the final quarter of 2024-25 which will enable the savings to be realised in full going into 2025-26.
	Total Communities Directorate		**375**		**85**		
	GRAND TOTAL OUTSTANDING REDUCTIONS		**415**		**125**		
	REDUCTIONS SHORTFALL				**290**		

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MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

EDUCATION, EARLY YEARS AND YOUNG PEOPLE (FORMERLY EDUCATION AND FAMILY SUPPORT)

CENTRAL EDUCATION, EARLY YEARS AND YOUNG PEOPLE

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
EDFS1	Reduction in staff mileage budgets	During the pandemic, most meetings were arranged virtually, instead of in person. This arrangement has continued in part with hybrid working, although there are clear cases where in-person meetings are essential. The result is that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with limited impact on service provision, but positive benefits for achieving net carbon zero.	18	18	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS2	Directorate Vacancy Management Factor	The introduction of an average 3% vacancy factor across the directorate - excluding schools, front-line services and grant-funded and income-generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	342	342	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS7	Income generation opportunities within the Music Service	Interest in developing a training function for schools provided by the Bridgend Music Service but this has not been costed and at a time when schools are looking to manage their service level agreements (SLAs) very carefully, this might not be possible. The national music service grant is subsidising this at the moment.	3	3	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS8	Increase price of school meals by 30p (saving is limited due to the roll out of the universal primary free school meals (UPFSM) initiative)	The cost of school meal in Bridgend is currently one of the lowest in Wales. It is anticipated that an increase of 30p per meal would still see Bridgend as being in the bottom quartile of school meal cost across Wales. It is worth noting that there may be a decline in the take-up of a school meal following previous price increases and this may negate any savings.	30	30	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS9	Cessation of Adult Community Learning (ACL) provision	This would result in staff redundancies. There could be alternative options available via external partners. This saving could lead to the partnership being weakened. There will also be a loss of presence felt within local communities.	149	0	The outcome of the consultation process for the cessation of the ACL service was finalised in quarter 3 of 2024-25. Savings will be achieved in full from 2025-26.	None required - saving will be made in full in 2025-26
EDFS11	Reduction in contribution to Central South Consortium	Welsh Government is currently reviewing school improvement arrangements in Wales. The review is due to report in late spring/early summer 2024. We would look to reduce some of the central administrative functions rather than frontline services (improvement partners/principal improvement partners).	35	35	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
EDFS12	Educational Psychology Service - Reduction in equipment, mileage and staff	This may result in educational psychologists not using latest test materials for their assessments which may mean results are invalid. This could also result in a potential reduction in in-person visits to schools and an increase in online sessions. This could result in the local authority being unable to meet its statutory duties under legislation, as the statutory role of educational psychologists could not be met due to reduced capacity. The local authority could be open to legal and tribunal challenge due to missed timescales and failure to meet its statutory duties. Unidentified needs of learners and significant placement breakdowns could lead to an increase in out-of-county specialist placements requested at additional cost.	38	38	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS13	ALN Statutory Team - reduction to staffing structure	The local authority could be unable to meet its statutory duties. The local authority could be open to legal and tribunal challenge due to missed timescales.	17	17	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS14	Early Years ALN, Cognition and Learning and Complex Medical and Motor Impairment - review of pay grades, reduction in staffing numbers	There could be a reduction in training offered to schools. The team may be unable to oversee the Observation and Learning Resource Centres at the current level. The early identification of needs of pupils may not be identified as quickly as desired. Schools may not have expertise to support pupils and needs escalate.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS15	The Bridge Alternative Provision - staffing reductions and charging schools for hospital education	The setting may be unable to offer pupils the option to continue their studies through the medium of Welsh (previous Estyn recommendation). There could be insufficient staff to pupil ratios which could have potential safeguarding risks and limit the number of pupils The Bridge is able to accommodate.	81	81	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS16	Learner Support - staffing reductions	There is a statutory requirement to support young people with additional learning needs up to the age of 25. This saving could result in schools being unable to effectively manage additional learning provision, therefore potentially causing more local authority individual development plans which could cost the local authority more. This could result in an increased risk of tribunals.	16	16	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS17	School Modernisation budgets - review of staffing and non-staffing budgets	This could result in challenges in respect of site maintenance. This could also impact on the delivery of some capital projects.	22	22	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS18	Sensory Team - Hearing and visual impairment - review of staffing and non staffing budgets	This could result in a failure to meet statutory duties for hearing impaired (HI) and visually impaired (VI) learners. Learners with a HI and VI may be unable to access visits and in class support, modified resources and the school curriculum. This could result in the Learning Resource Centre not being staffed fully.	35	35	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
EDFS19	Communication and Relationships Team - Referrals only accepted for pupils who are at risk of permanent exclusion and placement breaking down. No longer completing observations for the ND Pathway	This could result in schools not following the local authority graduated response due to waiting times of support being implemented. Pupils placed on reduced timetables while schools await action plans could increase. This could result in pupils not progressing on the Neurodevelopmental Pathway due to specialist teachers being unable to complete professional recommendations.	142	0	Saving not met in 2024-25 due to the overall increase in pupils needing service. There has been a significant increase in the number of pupils receiving both fixed term and permanent exclusions across Bridgend. This has resulted in additional requests for 1:1 support, to maintain their education provision. In addition to this where a pupil has been identified as requiring a specialist class or provision and there is no available space an ancillary package of support is put in place to meet the Additional Learning Needs Provision identified in the pupils Individual Development Plan (IDP) as per the ALN Code for Wales 2021. We currently have waiting lists at every key stage and across provisions.	Consultation is due to start soon with the outcome of the consultation determining the next steps. Shortfalls against this savings target will be met through one off efficiencies in 2025-26 to deliver a balanced budget position.
EDFS20	Welsh in Education Strategic Plan (WESP) - reduction in translation services and review of staffing	This could result in a less co-ordinated approach to increasing Welsh-medium education and seeking opportunities to engage in activities through the Welsh-medium. WESP Coordinator to translate which would impact the ability to meet targets set within the WESP and could lead to a failure in meeting Welsh Government targets to increase Welsh-medium education.	10	10	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS21	School Music Service - cease payments of all Four counties ensemble financial commitments, cease all hire of vehicles for concerts etc	No offer of collaborative Four Counties activities to learners.	7	7	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS23	Reduction in Catering Services maintenance budget	This could mean a reduction in the purchase of replacement equipment for kitchens and an inability to comply with new refuse legislation from April 2024 for food recycling. This could have an impact on the local authority's resilience to maintain school kitchens effectively.	154	154	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS24	Review of staffing structure within the Education Directorate Support Unit (EDSU)	This could result in several challenges within the directorate's business function arm including the ability to coordinate correspondence, respond to Welsh Government requests and support administrative activity.	63	63	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS25	Review of staffing structures and non-staffing budgets within the Corporate Health and Safety Unit (CHSU)	This could result in less specialist health and safety support available across the organisation and may require the local authority to purchase additional external support if required at a later date.	40	40	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS26	Review of staffing structure within Pupil Services	This could result in the directorate having less ability to discharge statutory functions (that is, school admissions, child performance licensing, chaperone licensing, child employment and the appointment of local authority governors).	18	18	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS27	Review of staffing structures within Early Help	This could result in increased referrals to statutory services such as Social Care, and Child and Adolescent Mental Health Services (CAMHS). This could result in reduced support for learners, parents and carers.	132	132	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
EDFS28	Youth Support - redistribution of resources including the provision of a mobile youth support facility	This could result in a lack of appropriate spaces for young people to socialise can lead to them becoming isolated which in turn has a negative impact on their emotional wellbeing and mental health. This impact could be mitigated by the use of the new mobile youth provision vehicle.	26	26	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS29	Early Years and Childcare Team - reduction to project delivery budget (for example, training and grants available to childcare settings)	This could result in reduced training opportunities for the sector and the possibility of the team being unable to meet statutory requirements.	14	14	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS30	Edge of Care Services - staffing restructure	This could result in a reduction of services to children and families.	84	84	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
EDFS31	Youth Justice Service - review of staffing and non-staffing budgets	Loss of external provision could mean that the Bridgend Youth Justice Service would need to deploy an alternative operating model which may result in a decreased offer to young people.	34	34	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Education, Early Years and Young People		**1,560**	**1,269**		

SCHOOLS

SCH1	Efficiency savings against School Delegated Budgets - 3% in 2024-2025 then 2% for 2025-26 and 1% thereafter.	It is important to note that some of this impact may be mitigated by the financial support provided to schools from the local authority in assisting schools to meet cost pressures in relation to pay and pensions, and energy. Further to discussion with headteachers, the following potential impacts have been identified: 1. Risk of increased school deficit positions; 2. Potential to result in some teacher and other staff redundancies; 3. Increase in class sizes; 4. Loss of interventions; 5. Increase in staff absence; 6. Low staff morale; 7. Increased workload; 8. Reduced curriculum offer; 9. Reduced leadership/strategic thinking time; 10. Potential inability to meet statutory requirements; 11. Decrease in adult support in classrooms; 12. Increase in pupil exclusions; 13. Decline in standards; 14. Reduction in ability maintain school buildings; 15. Limited extra-curricular activity; 16. Increase in referrals for behaviour support; 17. Reduced support for learners with additional needs; 18. Reduction in professional learning opportunities; 19. Loss of expertise due to teachers and senior leaders leaving the profession.	3,441	3,441	Savings achieved due to overall reduction in Individual Schools Budget (ISB). However, reduced budgets have resulted in an overall deficit balance for schools at year end of £619,000.	Close monitoring of school budgets will continue going into 2025-26 with a further 1% efficiency saving to be achieved on school delegated budgets and officers continue to work with schools to bring this overall deficit down.
	Total Schools		**3,441**	**3,441**		

	Total Education, Early Years and Young People Directorate		**5,001**	**4,710**		

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
SOCIAL SERVICES AND WELLBEING						
SSW1	Reduction in staff mileage budgets	During the pandemic most meetings were arranged virtually, instead of in person. This arrangement has continued in the main since then with hybrid working, although there are clear cases where in-person meetings are essential, with the result that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with no impact on service provision, but positive benefits for achieving net carbon zero.	128	128	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW2	Directorate Vacancy Management Factor	The introduction of an average 3% vacancy factor across the directorate - excluding front line services and grant funded and income generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	255	255	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW3	Non Residential Charges Income Generation	Review of the service pricing model and increasing unit costs with a view to generating additional income. Based on unit cost increase of 7.5%. Services are provided to vulnerable adults following an assessment of need. There is risk that individuals will cancel care packages and not have their needs met which could result in higher packages of care required in the future cost and/or an increase in debt recovery. Welsh Government has set a maximum charge of £100 per week that can be charged to an individual for non-residential care, so for those people already paying the maximum amount no additional income will be generated. In terms of flat rate charges such as Transport and Meals, no additional income can be generated under the current regulations.	75	75	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW4	Remodelling Day Opportunities	As part of the wider prevention and wellbeing agenda the service is reviewing all daytime opportunities to create environments in vibrant and compassionate communities that offer a wide and diverse opportunity. This will enable the department to review how the localised community hubs are operated and managed. This will include transport arrangements, management structures and overall operation and service that is delivered. The review will include a rebalance of who operate day time services in Bridgend but could reduce the numbers attending and /or a reduction in current service provision.	200	200	The saving has been met in 2024-25 through freezing vacant posts on a temporary basis while the review of Day Services is complete.	None required - saving made in full in 2024-25
SSW5	Direct Payments Reimbursements	Invest to save proposal approved to fund a staff member to manage individual direct payment cases and action surplus fund reclaims to reduce overall spend. The savings target is net of the costs of implementing this proposal.	250	250	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW7	Review opportunities to amend the current energy payment arrangements for the leisure contract	A formal review and extension of contract could enable a change to how energy is paid for within the partnership with a positive impact on costs. Halo currently pay their energy bills directly but if BCBC were to pay there is greater economies of scale and potential tax savings. It would likely need a contract extension and review of the contract to justify such a change.	45	0	Advice received as to steps required to amend the partnership agreement to support the savings proposal.	On 22 October 2024, Cabinet approved modification of the existing contractual terms to vary the expiry date from 31 March 2027 to 31 March 2032. Work is ongoing to enter into a variation agreement with this budget reduction being the first call on any efficiencies identified.

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
SSW8	Review the full repairing lease aspect of the Health Living Partnership Programme contract and opportunities to invest differently or less within the leisure estate	The poor condition and need for investment of the leisure assets was a key driver in the development of the healthy living partnership and there have been improvements and scheduled maintenance at all venues since 2012. Council may wish to review how much funding it wishes to be spent on asset repairs and maintenance and whether the full repairing lease can be reviewed. Some small reductions may be possible by reviewing options for investment. The impact would be increased pressure on the capital/minor works programme to cover repair and replacement requirements and potentially not all investment needs would be met. The contractual implications of the outcome of the review will need to be considered.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW9	Review the operating costs of leisure facilities	The operating costs of the leisure buildings have progressively improved since 2012 and as such the financial savings from building closures have reduced. A review of opening hours will deliver some efficiencies in 2024. A broader leisure strategy is being developed which will inform the remodelling of leisure in the county borough for future years.	30	30	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW11	BCBC to waive protections on concessionary pricing and discounted rates for the more vulnerable in leisure settings	These categories of user have been developed in line with the terms of the leisure contract seeking to support our most vulnerable by reducing cost as a barrier to accessing services that support wellbeing. There has been success in this and large numbers of people benefit from concessions including the means tested access to leisure scheme. This subsidy could be removed but risks would include levels of participation reducing and also related income. Many of the beneficiaries in this category are means tested. This may challenge the socio economic duty. These individuals are part of communities which have the lowest mortality rates and the highest burden of chronic disease in the county borough.	15	15	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW13	Council to reduce its investment into cultural services including the availability of buildings, services or resources relating to its libraries, supported employment, community venues and arts programmes	Will include consideration of a reduction in library opening hours, library resources, community centres, supported employment for people with disabilities, arts activity and resources (for BCBC to determine) and other services or venues managed on behalf of the Council. It will be for Council to determine the contractual changes it requires and the related changes to the partnership agreement. For some services there will potentially be the need for public engagement or consultation.	360	65	Cabinet report in May 2024 approved £50K reduction to book fund and removal of £15K subsidy for the Youth Theatre, along with public engagement over how future savings can be achieved. Maximisation of Shared Prosperity Fund mitigated the shortfall against this proposal in 2024-25.	Further reports will be presented to Cabinet to enable the outcome of consultation exercises to be taken into account when finalising any proposed changes. The service will also continue to maximise grant funding opportunities throughout 2025-26.
SSW14	Dual use facilities operated in partnership with schools to increase income generation in line with fees and charging policy	Sites are operated on a shared usage basis with management agreements. They benefit schools during the day and community beyond. In a number of instances external investment has developed facilities. An opportunity to increase charges and deliver a small saving. Operating costs have increased in recent times and no uplift. We would be looking to increase charges by a further 10%.	8	8	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW15	BCBC to withdraw or reduce its commitment to older persons strategy, ageing well in Bridgend and becoming an age friendly community	This would see a reduction to the older persons strategy budget which would limit BCBC to lead on Age Friendly Communities workstreams going forward. This is currently in the corporate plan. If agreed, this would require the policy to be changed. The grant to Cruse is also currently funded from this cost centre so a £20k reduction applicable overall.	15	15	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
SSW17	BCBC consider efficiency savings from Third Sector Contracts - bereavement services	Annual grant payment which is a small contribution to larger scale service providing bereavement support for a range of circumstances. Will have been in demand during the pandemic period in particular. Would remove an important support service for those experiencing bereavement.	5	4	Notice served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
SSW18	BCBC consider efficiency savings from Third Sector Contracts - dementia services	Annual grant payment, for which we are currently reviewing the specification, its need and how services to support people awaiting or receiving diagnosis fit within overall support available locally and regionally. Numbers of people experiencing dementia predicted to grow and reducing the resource would create demand for alternative support or services.	57	47	Notice served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
SSW19	BCBC consider efficiency savings from Third Sector Contracts - stroke services	The service is commissioned by health, where BCBC made a 20% funding contribution. This reduction would impact directly on people who receive these services. The individual impact assessments are in development.	20	20	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW21	Reduction to the Healthy Living Partnership Management Fee from 2024-25	The saving will be achieved due to re-profiling the management fee and successfully securing funding from other sources to undertake improvement works/maintenance works that HALO would have otherwise undertaken. Extending the contract would support further potential for savings (SSW6). £164k of this saving relates to Management Fee and £36k relates to Leisure Client budget.	200	200	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW22	BCBC consider efficiency savings from Third Sector Contracts - substance misuse services	This is an annual grant payment, which has the potential to be ceased. An impact assessment will need to be completed as no new referrals from BCBC have been made this year, there is a potential that people receiving this service will need ongoing care and support and result in higher packages.	34	28	Notice served covering a 10 months saving in 2024-25.	None required - saving will be made in full in 2025-26
SSW23	Reduction of the BCBC contribution towards the regional Western Bay adoption service	Based on the recent levels of refunds experienced since 2020-21, a reduction appears reasonable. The main risk is that the service may have an increase in cases where children should be placed for adoption and this will increase the usage of the regional service and associated costs.	250	250	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW24	SCWDWP Training Reductions 1. Reduction in use of external venues for training delivery. 2. Increase offer of hybrid learning opportunities e.g., on-line resources, e-learning and on-line training. 3. External training courses / conferences to be supported only where there is an identified need that cannot be met by in-house resources. 4. Use of internal staff to facilitate training workshops. 5. Reduce the impact of non-attendance at training by introducing a non-attendance charge.	Insufficient availability of internal venues suitable to hold training events. Certain training requires physical attendance and specialist resources. Requires ICT equipment and skills to access on-line activities. External trainers bring specialist knowledge and skills that internal trainers could not replicate.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW25	Review of support staffing structure	Redundancy costs would have to be paid, risks in service delivery and compliance agenda which could result in poor regulatory judgements.	55	55	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
SSW26	Increasing Charges for in-house care homes	Aim for full cost recovery on in-house care home charges	140	140	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
SSW27	Reduction of contribution to BAVO SLA by 10%	Financial pressure on BAVO and reduced service provision for citizens of Bridgend	6	6	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Social Services and Wellbeing		**2,248**	**1,891**		

COMMUNITIES

COM1	Reduction in staff mileage budgets	During the pandemic most meetings were arranged virtually, instead of in person. This arrangement has continued in the main since then with hybrid working, although there are clear cases where in-person meetings are essential, with the result that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with no impact on service provision, but positive benefits for achieving net carbon zero.	34	20	Achieved 58.8% of budget reduction proposal in 2024-25 - a £3,000 increase from the £17,000 achieved up to quarter 3.	Close monitoring of staff mileage budgets will be undertaken throughout 2025-26, with alternative budget reduction proposals to be identified if shortfall continues into the next financial year.
COM2	Directorate Vacancy Management Factor	The introduction of an average 5% vacancy factor across the directorate - excluding front line services and grant funded and income generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	500	500	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM3	Increase garden waste subscription cost to £50 per household and £45 for pensioners (Currently £46 per household or £42 for pensioners)	Potential increase in fly tipping. Loss of subscribers especially as it is the second year the subscription has been increased. Increase would not result in full cost recovery under the current contract, but recyclable tonnages contribute to an improved recycling level against Welsh Government targets to reduce the likelihood of penalties.	13	13	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM4	Increase bulky waste charges from £25 for 3 items to £30	Potential increase in fly tipping especially as it is the second year the charge has been increased. Increase would not result in full cost recovery under the current contract, but recyclable tonnages contribute to an improved recycling level against Welsh Government targets to reduce the likelihood of penalties.	10	10	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM5	Removal of revenue budget used to fund the Council's Cardiff Capital Region City Deal (CCRCD) capital contribution	When the CCRCD was approved by the Council it was agreed that the Council's capital contribution (circa £11.3m) would be funded from revenue contributions and a recurrent budget pressure of £598k was included in the 2017-18 revenue budget. The total funding required is now almost complete which will enable the revenue budget to be reduced accordingly.	598	598	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM6	Increase fees on Bereavement services, i.e. burial charges by 20%	Income target has been based on historic income levels achieved and the application of a 20% increase to current charges. There is a risk to achieving the income target if there is a reduction in burials compared with the last two years if they return to pre-pandemic levels, or if relatives seek alternative services from neighbouring authorities.	96	96	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

APPENDIX 2

Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
COM7	Review of charging mechanism for the Major Projects Team within Corporate Landlord (Architects) to ensure full cost-recovery	Fees to be aligned to industry standard charge out rates to ensure continued competitive rates reflective of the fair and reasonable costs of providing the service compared to an outsourced solution. Such charge out rates to factor in total costs of the major projects team as a whole. Schemes within the capital programme that are using the services of the Major Projects Team will see an increase in the rates charged to them.	97	97	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM9	Cessation of Shopmobility Scheme	Non statutory service and has ceased since October 2022 following the closure of Brackla 1 Car Park.	21	21	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM10	Review of Porthcawl Marina berthing fees with a view to it operating on a full cost recovery basis	This would involve a review of the berth fees and other operational costs to enable full cost recovery.	32	5	The service was subject to unforeseen maintenance costs for the harbour gate and infrastructure.	A review of berthing fees will be undertaken with the results to be presented to the Harbour Board in October 2025.
COM11	Cessation of the Parks & Playing Fields Development Fund	In the MTFS 2020-21 to 2023-24 Council approved £75,000 of funding, for a period of two financial years, to support voluntary sports clubs based within the county of Bridgend. This funding period has now come to an end so the funding will be removed.	75	75	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM12	Removal of non-staffing budget within Economic Development	Budget previously used to support delivery of events, pop up business schools e.g. "rebel business school". The reduction in budget will impact on the economic support able to be provided by BCBC for similar events in the future. Will now source external grant funding for this initiative.	13	13	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM13	Reduce the budget available for the Climate Emergency Response Programme, including ULEV implementation	The Climate Emergency Programme will have to be remodelled. This will impact on the Welsh Government's net zero 2030 target and will now require additional grant funding from external sources or joint working with partners to achieve our ambitious targets.	55	55	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM14	Office Rationalisation to include closing Raven's Court and the Innovation Centre and sharing accommodation in Civic Offices with the MASH and SWP.	Opportunity to close underused buildings & save running costs. Also to increase close working relations with South Wales Police and MASH and utilise largely unused area of the Civic Offices. Will also be an opportunity to cover 190K of unrealised savings on accommodation from previous years.	73	0	Raven's Court was not commercially let during 2024-25. Sharing of accommodation in Civic Offices did not take place until the final quarter of 2024-25.	Sharing of accommodation at Civic Offices along with the sale of the freehold of Raven's Court in the final quarter of 2024-25 will enable the savings to be realised in full going into 2025-26.
COM15	Reduce weed spray from 3 times to 2 times a year, reversal to former MTFS cut.	Will impact on the perceived visual amenity of the Borough, need to look at this with grass cutting and through biodiversity measures.	12	12	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM17	Removal of Sponsorship for Major Events Fund	Removal of ability to sponsor major Event in 2024/2025 & receive the benefits that accrue from the global marketing opportunities that events provides. Will need to focus increased marketing activities through partnerships in future years.	25	25	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM18	Reduction in County Wide Strategic Regeneration Funds	Will significantly impact regeneration initiatives & remove the ability to match fund external grants and undertake feasibility studies, parking studies etc. Will impact on both by restricting the ability to match fund external grant schemes and provide regeneration opportunities in our towns centres and valleys. No town centre management activities funded in the future, including summer fayres & events.	300	300	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
COM19	Reduction in size of strategic regeneration team to release core funding	Redundancy and restructure required. Will reduce the capacity of the team to deliver regeneration schemes, will involve cessation/ omitting of projects and reprioritisation of work. Corporate Plan Obj's 2 & 3 will be impacted by the reduced resourcing so a reduction in the regeneration that can be achieved and the resulting economic benefits. Following commitment will be at risk of not be realised: 1. Deliver a regeneration strategy for the Ogmore and Garw Valleys. 2. Develop funding bids for our valleys, to enhance the economy and stimulate new job opportunities 3. Deliver a commercial property enhancement grant for all valleys high streets, to make them look better and bring properties back into commercial use. 4. Redevelop Bridgend Central Station, including improving the front public area with a transport interchange at the rear, providing links between bus services and trains, in partnership with Welsh Government and Network Rail.	42	42	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM22	Removal of Trainee Surveyor Post (Currently Vacant)	Reduction in number of posts within the structure will impact on the effectiveness and efficiency of the service area. Removal of succession planning. Will impact posts around it who will have to pick up functions of this role. Possible impact on line manager grade and partial service restructure required	33	33	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM23	Reduce available property maintenance budgets in Corporate Landlord by up to 10% per asset	Risk to safety and statutory building compliance. Reduction of maintenance activity counter productive for long term asset operation. This reduction would be limited to assets where non essential maintenance items can be removed. Will have a resulting negative affect on teams delivering maintenance functions with reduction in volume of orders, but these reductions have been taken previously and could be taken again if required	100	100	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM26	Cessation of provision of hard copy recycling calendar to all residents	Item is non-provisional so negotiation would be required with the contractor. Portal allows residents to check their collection day online but may cause some issues for those without access to internet.	45	45	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM28	Letting of former Woodmat Property, Brynmenyn Estate	Would maximise income but result in loss of use of asset for future depot or CRC relocation. Also, Loss of significant power supply at site for future ULEV charging facilities	35	0	Opportunities were sought to achieve this budget reduction proposal, but let not agreed by end of 2024-25.	Corporate Landlord are currently finalising the terms to lease this unit.
COM29	Removal of Estimator & Cost Control Manager – DLO (Currently Vacant)	Removal of post would require supervisor to undertake duties of cost control.	45	45	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
COM30	Switch Waste collection vehicles from HVO fuel to Diesel	Green deliverability as implementation is straightforward. But would represent a backwards step environmentally switching from green vegetable derived fuel back to a fossil fuel, albeit in WG Co2 reporting mechanisms minor variance.	136	136	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
COM31	Release of 2 x vacant strategic transport planning posts	No further work on statutory active travel programme and on development of active travel network and other highway infrastructure improvements impacting viability and future development. Council will not be able to fulfil the Local Development Plan policy requirements and loss of S106 contributions Inability to commit to planning performance agreements for large scale schemes/development resulting in a loss of financial contributions No submission of bids for future transport funding under Levelling Up Fund or Shared Prosperity Fund No further work on current Bridgend strategic transport priorities Failure to comply with statutory duties under the Active Travel Act and national planning policy.	70	70	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Communities Directorate		**2,460**	**2,311**		

<u>CHIEF EXECUTIVES</u>

CEX1	Reduction in staff mileage budgets	During the pandemic most meetings were arranged virtually, instead of in person. This arrangement has continued in the main since then with hybrid working, although there are clear cases where in-person meetings are essential, with the result that spend on mileage is less than pre-pandemic levels, and budgets can be reduced accordingly with no impact on service provision, but positive benefits for achieving net carbon zero.	18	18	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX2	Directorate Vacancy Management Factor	The introduction of an average 3% vacancy factor across the directorate - excluding front line services and grant funded and income generating posts. Recruitment has been an issue across the Council in recent years and there have been underspends in many services which cannot recruit to vacant posts. This target will need to be managed carefully and reviewed to ensure it is achievable.	510	510	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX3	Removal of the security patrols at Brynmenyn House - Homelessness hostel	There have been significant challenges since Covid-19. Numerous Community Safety Partnership meetings have been held with ward Councillors and local residents. The security, alongside additional CCTV cameras and lighting, have been part of a package of measures to support the community cohesion. The removal / reduction of the service, would reduce visibility and ability to react to situations, and potentially increase police presence, as these were reduced due to the presence of the security.	150	150	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX4	Efficiency saving target targeting supplies and services budgets within Housing Solutions	Limited impact as review has identified small historic under spends against this budget category	35	35	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX5	Increase Rental income budget at Brynmenyn House - Homelessness hostel	Limited impact as proposal reflects income levels consistently achieved since the Covid-19 pandemic.	63	63	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX6	Staffing saving in Finance Section	Staff saving in finance section achieved through removal of vacant posts and potential restructuring. This will place additional pressure on remaining staff, putting deadlines for grant returns and accounts closure at risk, impacting on levels of grant income achievable.	71	71	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
CEX7	Reduced contribution to the Regional Internal Audit Service (RIAS)	Requirement for Head of Internal Audit to provide an annual audit opinion on the Council's control environment in relation to governance, risk management and internal control, which may be more difficult if less audit work undertaken. Consultation on the budget also required with other RIAS partners.	27	27	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX8	Charging the public for Pest Control Services	Look to implement a full cost recovery model for this service	67	35	Due to reduced uptake of the service, the saving was only partly achieved in 2024-25.	Close monitoring of the income budgets for Pest Control Services will be undertaken throughout 2025-26, with alternative budget reduction proposals to be identified if shortfall continues into the next financial year.
CEX9	Reduction of ICT Printing costs	Due to the increase in working from home across the authority, savings can be explored in the ICT Print Strategy areas when the printing framework contract is considered for renewal in January 2024. The tender will be designed to be in line with the cultural shifts towards the paperless office agenda.	5	5	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX10	Amend the Disclosure and Barring Service (DBS) Policy to only recheck every three years for employees governed by the Care Standards Act 2000, not for all employees who require a DBS.	This approach is being followed in neighbouring authorities, but the impact will be that the employees (outside the Care Standards Act 2000) will only have a DBS on appointment.	30	30	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX11	Increase in various Registrars income budgets	Limited impact as proposal reflects income levels consistently achieved since the Covid-19 pandemic.	50	50	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX12	Increased income from Registrars' Ceremonies	Increasing the fees charged for Marriages and other ceremonies by 15%. We are currently charging below the Welsh average. The increased cost could potentially reduce demand, however the Registrar's fee is a small percentage of the overall cost of the average wedding budget. It is also an essential requirement for a wedding and it is therefore anticipated that this increase in fee will have minimal impact on demand.	43	15	Due to reduced uptake of the service, the saving was only partly achieved in 2024-25	Full saving is anticipated to be met in 2025-26 as early part of year has seen an increase in bookings.
CEX13	Restructure of Legal Services	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 4 posts.	154	94	Saving partly achieved in 2024-25 due to timing of Legal restructure	The restructure of Legal Services has been completed therefore the savings will be made in full from 2025-26.
CEX14	Reconfiguration of Business Support	Significant reduction in business support management and resilience, creating a single point of failure. Business Support is pivotal to managing the central business support to the Chief Executive, Communities and Education and Family Support Directorates. It will create a significant capacity risk in day-to-day management and add to workload pressure and stress down through the structure. The reconfiguration will look at making additional savings across the teams, but this will impact on such things as providing management information to services, particularly Corporate Landlord, supporting Legal Services accreditation to LEXEL, the ability to support minute taking of HR disciplinary and other such investigations, family support services, Youth Justice Services and performance management.	160	112	Shortfall in savings target due to timing of implementation of restructure, mitigated partly by under spends on vacant posts.	Phase 2 of Restructure anticipated to be completed in 2025-26 so remainder of saving will be met.
CEX15	Increase income generated from legal fees for property transactions, S106 Agreements and Highway Agreements	Currently the Service charge a set fee of £2k for the S106 process and highway agreements are based on a percentage of the estimated cost of the works for a highway scheme which is currently 1%. An estimate figure of potential increase in income has been given but this is subject to take up of the service and could be more or less.	20	0	Legal Services are reliant on the instructions that come through from Directorates. Due to reduced uptake of the service, the saving was not achieved in 2024-25	This will require close monitoring in 2025-26 and if not achieved alternative budgets will be identified to mitigate any shortfalls.

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
CEX16	Restructure of HR Service	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 7 posts.	289	228	Shortfall in savings target due to timing of implementation of restructure, mitigated partly by under spends on vacant posts.	The restructure of HR has been completed therefore the savings will be made in full from 2025-26.
CEX17	Household Canvas - Reduction / Limited Canvass Door Knocking	Will focus on poor response areas but will draw criticism from Electoral Commission.	9	0	Saving not achieved due to increased costs associated with canvassing.	This will require close monitoring in 2025-26 and if not achieved alternative budgets will be identified to mitigate any shortfalls.
CEX18	Restructure of Procurement Team	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 2 posts.	62	62	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX19	Restructure of Democratic Services	Reduction in capacity, reduction in service delivery, and impact on staffing levels. If the whole saving is agreed this will be the equivalent of 2 posts.	96	73	Shortfall in savings target due to timing of implementation of restructure	The restructure of Democratic Services has been completed therefore the savings will be made in full from 2025-26.
CEX20	Restructure of Corporate Policy and Public Affairs Team	Service could not expand and develop as proposed. Graduates could assist until their contract expires (Nov 2024)	45	24	Shortfall in savings target due to timing of implementation of restructure	The restructure of Corporate Policy and Public Affairs has been completed therefore the savings will be made in full from 2025-26.
CEX21	Review of provision of Homelessness Service	Review the options for providing accommodation to those who are homeless by reducing reliance on hotel and private provision	397	397	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX22	Review of ICT Services	Review the contract for telephony services to commence from April 2024. Review the use of teams in the Authority to reduce software costs. Consider partnership working to support and enhance the ICT provision	398	59	Further work to be carried out on a review of the telephony budget across the Council following a re-procurement exercise. Update to be provided to Cabinet in future revenue monitoring reports.	Full saving is anticipated to be met in 2025-26 due to re-procurement exercise undertaken on telephony services
CEX23	Review the provision of Partnerships and Customer Services	Reduction in capacity, reduction in service delivery, and impact on staffing levels. Review input from partners where appropriate	216	155	Saving partly achieved due to delays in confirmation of alternative external funding towards 2 posts.	Confirmation of funding has now been finalised - Full saving now anticipated to be met in 2025-26.
CEX24	Reduce subsidy to Citizens Advice Bureau by 10%	Financial pressure on CAB and reduced service provision for citizens of Bridgend	22	22	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX25	Staff savings from Finance senior management team	This will require a restructure of the Finance senior management team, and potential redundancies, reducing senior leadership capacity and knowledge and experience, at a time of increasing focus and pressure on council finances. This will place additional pressure on remaining staff.	70	0	Shortfall in savings target due to timing of implementation of restructure.	Full saving now anticipated to be met in 2025-26 once restructure is complete.
CEX26	Increase in Finance income budgets	Increase in charges to the Finance Section's clients, including schools and other services / organisations where the finance team provide support e.g. Consortium of Local Authorities in Wales (CLAW).	28	28	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX27	Restructure of the Council's Benefits and Assessment Team	This will require a restructure and potential redundancies. This would be exacerbated by annual reductions to the Housing Benefits Administration Grant, which is £20k in 2024-25. The impact will be longer times taken to process housing benefits and council tax reduction claims, and undertake assessments, and more likelihood of error and fraud.	90	90	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
CEX28	Reduction of staffing in the Council Tax section	This proposal will mean the reduction of staffing, resulting in additional pressure on remaining staff, delays in processing council tax queries, and the real likelihood of reductions in the amount of council tax income being collected. The team is already dealing with additional work as a result of the introduction of council tax premiums for empty properties and the forthcoming introduction of premiums for second homes.	63	63	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25

MONITORING OF 2024-25 BUDGET REDUCTIONS

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Ref.	Budget Reduction Proposal	Impact, including on 5 Ways of Working as set out in the Wellbeing of Future Generations Act	Budget Reductions 2024-25 £'000	Value of saving achieved 2024-25 £'000	Reason why not achieved	Proposed action in 2025-26 to achieve
CEX29	Reduction to the Shared Regulatory Service budget	Reduction in capacity, reduction in service delivery, and impact on staffing levels. Service has been asked to identify savings by three partner Councils and decision will be made by Joint Committee.	58	58	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Chief Executive's Directorate		**3,246**	**2,474**		

CORPORATE/COUNCIL WIDE

CW1	Increased income receivable from investments and loans	No impact in the short term as current income is significantly higher than budget. However, if interest rates fall below pre-pandemic levels then the level of income will fall. The council's cashflow is managed carefully to ensure security, liquidity and yield, so funding is not placed at risk. As reserves are drawn down there will be less funding available for investing and this level of income may not be achievable.	90	90	Full saving achieved in 2024-25.	None required - saving made in full in 2024-25
	Total Corporate/Council Wide		**90**	**90**		

	GRAND TOTAL REDUCTIONS		**13,045**	**11,476**

	REDUCTION SHORTFALL			**1,569**

6,415	**7,071**
2,243	**1,560**
4,387	**4,414**
13,045	**13,045**

BRIDGEND COUNTY BOROUGH COUNCIL	Budget 2024-25 Expenditure Budget £'000	Income Budget £'000	Net Budget £'000	Actual Outturn £'000	Actual Variance Over/(under) budget £'000	% Variance
EDUCATION, EARLY YEARS AND YOUNG PEOPLE						
School Delegated Budgets	140,011	(21,302)	118,709	118,709	-	0.0%
Learner Support Group	7,995	(1,004)	6,991	7,263	272	3.9%
Early Years and Young People Group	7,072	(4,133)	2,939	2,411	(528)	-18.0%
Strategic Performance and Support	18,339	(4,428)	13,911	13,063	(848)	-6.1%
Schools Support	1,431	(838)	593	591	(2)	-0.3%
Sustainable Communities For Learning	3,972	-	3,972	3,976	4	0.1%
Other Education and Family Support	1,768	(60)	1,708	2,464	756	44.3%
TOTAL EDUCATION, EARLY YEARS AND YOUNG PEOPLE	**180,588**	**(31,765)**	**148,823**	**148,477**	**(346)**	**-0.2%**
SOCIAL SERVICES AND WELLBEING						
Adult Social Care	97,465	(24,735)	72,730	72,541	(189)	-0.26%
Prevention and Wellbeing	7,586	(1,039)	6,547	6,027	(520)	-7.94%
Childrens Social Care	31,365	(1,179)	30,186	31,384	1,198	3.97%
TOTAL SOCIAL SERVICES AND WELLBEING	**136,416**	**(26,953)**	**109,463**	**109,952**	**489**	**0.4%**
COMMUNITIES DIRECTORATE						
Planning & Development Services	2,327	(1,621)	706	871	165	23.4%
Strategic Regeneration	2,111	(1,149)	962	745	(217)	-22.6%
Economy, Natural Resources and Sustainability	13,742	(12,253)	1,489	1,242	(247)	-16.6%
Cleaner Streets and Waste Management	15,242	(1,773)	13,469	13,723	254	1.9%
Highways and Green Spaces	26,516	(13,512)	13,004	13,882	878	6.8%
Director and Head of Operations - Communities	286	-	286	297	11	3.8%
Corporate Landlord	15,862	(12,507)	3,355	2,830	(525)	-15.6%
TOTAL COMMUNITIES	**76,086**	**(42,815)**	**33,271**	**33,590**	**319**	**1.0%**
CHIEF EXECUTIVE'S						
Chief Executive Unit	494	-	494	526	32	6.5%
Finance	39,360	(35,284)	4,076	4,300	224	5.5%
HR/OD	2,345	(398)	1,947	2,008	61	3.1%
Partnerships	3,578	(1,303)	2,275	2,502	227	10.0%
Legal, Democratic & Regulatory	6,920	(1,069)	5,851	6,194	343	5.9%
Elections	181	-	181	189	8	4.4%
ICT	5,333	(1,259)	4,074	4,786	712	17.5%
Housing & Homelessness	11,473	(7,921)	3,552	3,826	274	7.7%
Business Support	1,244	(116)	1,128	1,161	33	2.9%
TOTAL CHIEF EXECUTIVE'S	**70,928**	**(47,350)**	**23,578**	**25,492**	**1,914**	**8.1%**
TOTAL DIRECTORATE BUDGETS	**464,018**	**(148,883)**	**315,135**	**317,511**	**2,376**	**0.8%**
Council Wide Budgets	46,911	(1,375)	45,536	30,408	(15,128)	-33.2%
Net Council Tax Collection				(611)	(611)	0.0%
Appropriations to Earmarked Reserves				13,063	13,063	0.0%
Transfer to Council Fund				300	300	0.0%
NET BRIDGEND CBC	**510,929**	**(150,258)**	**360,671**	**360,671**	**-**	**0.0%**

NB: Differences due to rounding of £000's

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APPENDIX 4

TOTAL MOVEMENT ON REVENUE AND CAPITAL EARMARKED RESERVES AS AT 31ST MARCH 2025

Opening Balance 01 Apr 24	Reserve	Movement as at 31 March 2025 Net Additions/ Reclassification	Draw-down/ unwound	Closing Balance 31 Mar 25
£'000		£'000	£'000	£'000
	Corporate Reserves:			
430	Asset Management Plan	-	(127)	303
1,856	Building Maintenance Reserve	-	(650)	1,206
123	Capital Asset Management & Asbestos Fund	-	(123)	-
349	Capital Feasibility Fund	611	(180)	780
349	Change Management	1,500	(22)	1,827
1,446	Digital Transformation, ICT & Finance Systems	(438)	(541)	467
500	Economic and Future Resilience Fund	-	-	500
830	Insurance Reserve	-	-	830
500	Major Claims Reserve	1,000	(500)	1,000
2,406	MTFS Budget Contingency	1,000	(226)	3,180
13	Property Disposal Strategy	-	(13)	-
1,893	Service Reconfiguration	-	-	1,893
10,695	**Total Corporate Reserves**	**3,673**	**(2,382)**	**11,986**
	Directorate Reserves:			
6,356	Directorate Issues	5,731	(4,533)	7,554
186	Looked After Children	-	(186)	-
103	Porthcawl Regeneration	-	(103)	-
23	Wellbeing Projects	-	-	23
6,668	**Total Directorate Reserves**	**5,731**	**(4,822)**	**7,577**
	Equalisation & Grant Reserves:			
63	Civil Parking Enforcement	142	(8)	197
914	HWB Schools Infrastructure	(914)	-	-
2,095	IFRS Grants	412	(734)	1,773
137	Local Development Plan	37	-	174
752	Special Regeneration Fund	76	(147)	681
44	Rest Bay	19	-	63
4,005	**Equalisation & Grant Reserves:**	**(228)**	**(889)**	**2,888**
2,405	School Balances	-	(3,024)	(619)
40,223	Capital Programme Contribution	8,507	(2,692)	46,038
9,730	Council Fund Balance	300	-	10,030
73,726	**TOTAL RESERVES**	**17,983**	**(13,809)**	**77,900**

NB: Differences due to rounding of £000's

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