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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 Democraidaidd

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

**Dyddiad/Date:** Dydd Mawrth, 4 Mawrth 2026

Annwyl Cyngorydd,

**CABINET**

Cynhelir Cyfarfod Cabinet Hybrid yn Siambr y Cyngor - Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont ar Ogwr, CF31 4WB / o bell drwy Microsoft Teams ar **Dydd Mawrth, 10 Mawrth 2026** am **14:30**.

**AGENDA**

- Ymddiheuriadau am absenoldeb  
Derbyn ymddiheuriadau am absenoldeb gan Aelodau.
- 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.
- Cymeradwyaeth Cofnodion  
I dderbyn am gymeradwyaeth y Cofnodion cyfarfod y 03/02/2026 a 17/02/2026 5 - 24
- Cysylltu â'r Gwaith  
25 - 32
- Canllawiau Cynllunio Atodol Drafft (CCA): Cyfleusterau Addysgol a Datblygiad Preswyl  
33 - 72

6	<u>Trefniant Partneriaeth Gwasanaethau Cymdeithasol a Llesiant ar gyfer Hyfforddiant Dementia</u>	73 - 76
7	<u>Adroddiad Rheoli'r Trysorlys Chwarter 3 2025-26</u>	77 - 100
8	<u>Polisi Dyrannu Tai Cymdeithasol Pen-y-bont ar Ogwr</u>	101 - 134
9	<u>Llety Dros Dro i Ddigartrefedd</u>	135 - 142
10	<u>Trethi Annomestig: Rhyddhad Dewisol: Cynllun Rhyddhad Trethi Lletygarwch Bwyd a Diod 2026-27</u>	143 - 150
11	<u>Adroddiad Gwybodaeth i'w Nodi</u>	151 - 166
12	<u>Materion Brys</u>  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 pharagraff 2.4 (e) o'r Rheolau Trefn y Cabinet yn y Cyfansoddiad.	
13	<u>Gwahardd y Cyhoedd</u>  Nid oedd yr eitemau canlynol yn cael eu cyhoeddi, gan fod eu bod yn cynnwys gwybodaeth eithriedig fel y'i diffinnir ym Mharagraffau 14 o Ran 4 a Pharagraff 21 o Ran 5, Atodlen 12A, Deddf Llywodraeth Leol 1972, fel y'i newidiwyd gan Orchymyn Llywodraeth Leol (Cymru) 2007 (Mynediad at Wybodaeth) (Amrywio).  Os, yn dilyn cymhwyso'r prawf budd y cyhoedd yn y Cabinet yn penderfynu yn unol â'r Ddeddf i ystyried yr eitemau hyn yn breifat, bydd y cyhoedd yn cael eu gwahardd o'r cyfarfod yn ystod ystyriaeth o'r fath.	
14	<u>Cymeradwyaeth Cofnodion wedi'u Eithrio</u>  I dderbyn am gymeradwyaeth y Cofnodion gwahardd cyfarfod y 03/02/2026	167 - 168
15	<u>Ailgomisiynu Gwasanaethau Cymdeithasol a Llesiant Gwasanaethau Gofal yn y Cartref</u>	169 - 176
16	<u>Strategaeth Comisiynu Lleoliadau 2025-2030 (Gwasanaethau Plant a Theuluoedd)</u>	177 - 236
17	<u>Adroddiad Ar y Cyd Esempt - Rhaglen Moderneiddio Ysgolion - Gorllewin Pen-y-bont ar Ogwr</u>	237 - 254

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](mailto: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:

E L P Caparros

M J Evans

N Farr

J Gebbie

GC Haines

M Jones

JC Spanswick

HM Williams

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COFNODION CYFARFOD y Cabinet A GYNHALIWYD ar ffurf hybrid yn Siambr y Cyngor – Y Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont ar Oqwr CF31 4WB / o bell drwy Microsoft Teams ddydd Mawrth, 3 Chwefror 2026 AM 14:30

Yn Bresennol

Y Cyngorydd JC Spanswick – Arweinydd a Chadeirydd

E L P Caparros

J Gebbie

N Farr

G Haines

M Jones

H Williams

M Evans

Swyddogion:

Jake Morgan

Michael Pitman

Carys Lord

Claire Marchant

Janine Nightingale

Kelly Watson

Lindsay Harvey

Gaynor Thomas

Adam Provoost

Jack Dangerfield

Robin Davies

Mark Galvin

Prif Weithredwr

Swyddog Gwasanaethau Democrataidd – Technegol

Prif Swyddog – Cyllid, Tai a Newid

Cyfarwyddwr Corfforaethol – Gwasanaethau Cymdeithasol a Lles

Cyfarwyddwr Corfforaethol – Cymunedau Dysgu

Prif Swyddog – Gwasanaethau Cyfreithiol a Rheoleiddio, AD a Pholisi Corfforaethol

Cyfarwyddwr Corfforaethol – Addysg, Blynyddoedd Cynnar a Chymorth i Deuluoedd

Rheolwr, Rhaglen Cymunedau Dysgu Cynaliadwy

Rheolwr Cynllunio Strategol – Cludiant

Uwch Swyddog Polisi Cynllunio Strategol

Rheolwr Grŵp, Strategaeth, Perfformiad a Chymorth

Uwch Swyddog Gwasanaethau Democrataidd – Pwyllgorau

Gwahoddedigion:

Y Cyngorydd JP Blundell

Y Cyngorydd A Ulberini-Williams

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**585. Ymddiheuriadau am Absenoldeb**

Y Penderfyniad a Wnaed	Dim
Dyddiad y Gwnaed y Penderfyniad	3 Chwefror 2026

**586. Datganiadau o Fuddiant**

Y Penderfyniad a Wnaed	Datganodd y Cyngorydd Neelo Farr fuddiant personol yn Eitem 10 ar yr Agenda, oherwydd ei bod yn byw gyferbyn ag ysgol gychwynol newydd Porthcawl Datganodd y Cyngorydd Hywel Williams fuddiant personol yn Eitem 12 ar yr Agenda, fel Llywodraethwr yn Ysgol Gynradd Abercerdin.
Dyddiad y Gwnaed y Penderfyniad	3 Chwefror 2026

**587. Cymeradwyo Cofnodion**

Y Penderfyniad a Wnaed	<u>PENDERFYNWYD:</u> Cymeradwyo cofnodion 13/01/2026 fel cofnod gwir a chywir.
Dyddiad y Gwnaed y Penderfyniad	3 Chwefror 2026

**588. Argymhelliad Craffu gan y Pwyllgor Trosolwg a Chraffu – Cymunedau, yr Amgylchedd a Thai**





	<p>ymgynghoriad arfaethedig yn cael ei gynnal ar y cyd â Chyngor Bro Morgannwg fel partner gweithredol Cyngor Bwrdestref Sirol Pen-y-bont ar Ogwr.</p> <p>Mae Cyngor Bro Morgannwg hefyd yn ceisio ymgynghoriad tebyg, meddai.</p> <p>Gofynnodd yr Aelodau lawer o gwestiynau, sef:-</p> <ul style="list-style-type: none"> <li>• A fyddai perygl y bydd rhai gofalwyr maeth yn gadael eu swyddi pe baent yn cael eu rhoi ar fand cyflog gradd is?</li> <li>• O ran gofalwr sy'n gofalu am blentyn sydd wedyn yn dod yn oedolyn, a ddylai fod yn rhaid i'r gofalwr hwnnw ailgofrestru fel Gofalwr Cysylltu Bywydau, neu a allai aros yn ei rôl bresennol fel Gofalwr Maeth?</li> <li>• Pryd yn y gwanwyn fydd yr ymgynghoriad 12 wythnos yn dechrau?</li> </ul> <p>Atebwyd y cwestiynau hyn gan y Dirprwy Arweinydd a'r aelod o'r Cabinet dros Wasanaethau Cymdeithasol, Iechyd a Lles a/neu'r Cyfarwyddwr Corfforaethol – Gwasanaethau Cymdeithasol a Lles.</p> <p><u>PENDERFYNWYD:</u> <span style="float: right;">Bod y Cabinet:</span></p> <ul style="list-style-type: none"> <li>• Wedi cymeradwyo dechrau'r ymgynghoriad am gyfnod o 12 wythnos ynghylch y newidiadau arfaethedig a amlinellir yn yr adroddiad, gan nodi y bydd y broses yn cael ei chydlynu â Chyngor Bro Morgannwg a rhanddeiliaid eraill o wanwyn 2026;</li> <li>• Wedi nodi y bydd adroddiad pellach yn cael ei gyflwyno i'r Cabinet yn dilyn yr ymgynghoriad.</li> </ul>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>3 Chwefror 2026</p>

**591. Tai Amfeddiannaeth – Canllawiau Cynllunio Atodol (Drafft)**

<p>Y Penderfyniad a Wnaed</p>	<p>Cyflwynodd yr aelod Cabinet dros Adfywio, Datblygu Economaidd a Thai adroddiad, er mwyn rhoi gwybod</p>
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	<p>i'r Cabinet am ganlyniadau'r ymgynghoriad cyhoeddus 6 wythnos ar fersiwn ddrafft y Canllawiau Cynllunio Atodol – Tai Amlfeddiannaeth; y sylwadau a dderbyniwyd a'r materion a godwyd; ymateb yr Awdurdod Cynllunio Lleol (LPA); a sut mae'r sylwadau hynny wedi dylanwadu ar fersiwn derfynol y CCA. Roedd yr adroddiad hefyd yn gofyn am gymeradwyaeth y Cabinet i gyflwyno ffurf derfynol y CCA i'r Cyngor i'w mabwysiadu (Atodiad 1 o'r adroddiad y cyfeiriwyd).</p> <p>Ychwanegodd y bydd mabwysiadu'r CCA yn galluogi gweithredu'n effeithiol y polisi ar Dai Amlfeddiannaeth o fewn y Cynllun Datblygu Lleol Amnewid (RLDP) a fabwysiadwyd, sef dogfen gynllunio defnydd tir statudol y Cyngor.</p> <p>Dywedodd aelod fod rhywfaint o bryder mewn cymunedau ar adegau ynglŷn â lefel y dwysedd sy'n ymwneud â rhai Tai Amlfeddiannaeth, er ei fod yn cyfaddef bod y fformiwla a ddyfeisiwyd yn yr achos hwn yn ymddangos yn deg ac yn gyfrifol. Gofynnodd, fodd bynnag, pa ddarpariaethau oedd gennym ar waith i'r fformiwla gael ei monitro dros amser a'i adolygu a'i haddasu, os oes angen.</p> <p>Cynghorodd yr Uwch Swyddog Polisi Cynllunio Strategol y byddai'r Polisi (a'r Cynllun Datblygu Lleol, h.y. CDLI), yn cael ei fonitro drwy'r Adroddiad Monitro Blynyddol a'i ddiwygio fel rhan o'r broses hon, os ystyrir ei fod yn angenrheidiol.</p> <p><b><u>PENDERFYNWYD:</u></b></p> <p style="text-align: center;"><b>Bod y Cabinet:</b></p> <ul style="list-style-type: none"> <li>(a) Wedi nodi cynnwys yr adroddiad hwn a'r ymatebion i'r ymgynghoriad a dderbyniwyd ar y CCA drafft ar gyfer Tai Amlfeddiannaeth, ynghyd â'r gwelliannau arfaethedig canlyniadol sydd ynghlwm yn Atodiad 2 i'r adroddiad.</li> <li>(b) Wedi nodi a chymeradwyo cynnwys y nodyn canllaw dwy dudalen o'r enw 'Canllaw i Reoliadau ac Adeiladu ar gyfer Tai Amlfeddiannaeth' ynghlwm fel Atodiad 3.</li> <li>(c) Wedi cymeradwyo cyflwyno ffurf derfynol y CCA drafft ar gyfer Tai Amlfeddiannaeth (yn Atodiad 1) i'r Cyngor i geisio ei fabwysiadu.</li> </ul>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>3 Chwefror 2026</p>

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**592. Diweddariad am Ddyraniad Cronfa Effaith Balchder Bro Llywodraeth y DU ar gyfer Bwrdeistref Sirol Pen-y-bont ar Ogwr**

<p>Y Penderfyniad a Wnaed</p>	<p>Amlinellodd yr Aelod Cabinet dros Adfywio, Datblygu Economaidd a Thai adroddiad ar yr uchod, er mwyn rhoi diweddariad am Gronfa Effaith Balchder Bro Llywodraeth y DU a gyhoeddwyd yn ddiweddar a'r dyraniad ariannol i Gyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr. Roedd yr adroddiad yn nodi cynnig ar gyfer gwariant ledled y Fwrdeistref Sirol, y gofynnir i'r Cabinet ei gymeradwyo, ac roedd yn ceisio awdurdod dirprwyedig i'r Cyfarwyddwr Cymunedau gwblhau'r rhaglen a'r mecanweithiau cyflawni perthnasol, gan gynnwys sefydlu cynllun grant cyfalaf.</p> <p>Cyfeiriodd aelod at baragraff 3.3 o'r adroddiad sy'n cyfeirio at Femorandwm Cyd-ddealltwriaeth gyda'r Weinyddiaeth Tai, Cyfathrebu a Llywodraeth Leol a gofynnodd a allai'r Cabinet weld hyn, a chadarnhaodd y Cyfarwyddwr Corfforaethol – Cymunedau y gallent wneud hynny.</p> <p>Ychwanegodd y Cyfarwyddwr Corfforaethol – Cymunedau y byddai Sesiwn Frifio i Aelodau yn cael ei threfnu pan gaiff y Gronfa ei lansio, er mwyn esbonio'r broses ynghylch llwybrau cyllido i aelodau, er mwyn iddynt allu rhannu hyn gyda'u grwpiau cymunedol, gan gynnwys sut i ymgeisio am gyllid yn unol â'r meini prawf cymhwyso ar gyfer hyn. Ychwanegodd fod yn rhaid gwario'r cyllid o £3m yn llawn erbyn 31 Mawrth 2027, felly roedd mynegiadau o ddiddordeb a cheisiadau am ddyrannu'r cyllid yn cael eu ceisio cyn dyddiad cau o 8 Ebrill 2026.</p> <p>Ychwanegodd y Cyfarwyddwr Corfforaethol – Cymunedau ymhellach y byddai ymgyrch gyfathrebu lawn yn cael ei chynnal i hysbysebu'r gronfa. Gellid gwario'r cyllid yn unrhyw le yn y fwrdeistref sirol, ar yr amod ei fod yn cyflawni un neu fwy o amcanion y gronfa fel yr amlinellir ym mharagraff 2.5 o'r adroddiad.</p> <p><u>PENDERFYNWYD:</u></p> <p style="text-align: right;">Bod y Cabinet:</p> <ol style="list-style-type: none"> <li>1. Wedi nodi cynnwys yr adroddiad hwn, gan ystyried y dyraniad ariannol a ddarperir gan Gronfa Effaith Balchder Bro Llywodraeth y DU a'r cyfleoedd y mae'n eu cyflwyno.</li> <li>2. Wedi cymeradwyo cyflawniad arfaethedig y Gronfa Effaith</li> </ol>
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	<p>Balchder Bro ym Mwrdeistref Sirol Pen-y-bont ar Ogwr fel y nodir yn adran 3 o'r adroddiad.</p> <p>3. Wedi dirprwyo awdurdod i'r Cyfarwyddwr Cymunedau, mewn ymgynghoriad â'r Prif Swyddog – Gwasanaethau Cyfreithiol a Rheoleiddio, Polisi Corfforaethol ac Adnoddau Dynol a'r Prif Swyddog – Cyllid, Tai a Newid mewn ymgynghoriad â'r Aelod Cabinet perthnasol, i gwblhau'r rhaglen a'r mecanweithiau cyflawni, gan gynnwys sefydlu cynllun grant cyfalaf.</p>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>3 Chwefror 2026</p>

**593. Polisi Derbyn Ysgolion 2027–2028 a Threfniadau Derbyn Cydlynol 2028–2029**

<p>Y Penderfyniad a Wnaed</p>	<p>Pwrpas yr adroddiad hwn, a gyflwynwyd gan yr Aelod Cabinet – Gwasanaethau Addysg ac Ieuenctid, oedd ceisio cymeradwyaeth y Cabinet ar gyfer Polisi Derbyn Ysgolion 2027–2028 (gweler Atodiad A i'r adroddiad) a chynghori'r Cabinet bod Trefniadau Derbyn Ysgolion Cydgysylltiedig 2027–2028, a gymeradwywyd ac a fabwysiadwyd yn flaenorol, wedi'u mabwysiadu heb newid ar gyfer 2028–2029.</p> <p>Mae derbyn disgyblion yn gyfrifoldeb statudol, sy'n cefnogi'r gwaith o godi safonau addysgol a lles plant, pobl ifanc a'u cymunedau lleol.</p> <p>Mae'r ddeddfwriaeth berthnasol yn ei gwneud yn ofynnol bod trefniadau derbyn ysgolion ar gyfer 2027–2028 yn cael eu penderfynu erbyn 15 Ebrill 2026 a bod yr awdurdod lleol yn llunio ac yn mabwysiadu Trefniadau Derbyn Cydgysylltiedig bob blwyddyn.</p> <p>Gofynnodd aelod pa mor aml y cafodd yr Asesiad Effaith ar y Gymraeg ei adolygu, a chynghorodd Rheolwr y Grŵp, Perfformiad y Strategaeth a Chymorth, fod hyn yn cael ei wneud yn flynyddol, ar y cyd â chymeradwyo'r Polisi Derbyn Ysgolion.</p>
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	<p>Nododd yr aelod hefyd fod bwlich o 9.2% o ran sgiliau Cymraeg poblogaeth Pen-y-bont ar Ogwr o'i chymharu ag ardaloedd eraill o Gymru. Gofynnodd felly, pa gynlluniau oedd ar waith i wella'r ystadegyn hwn?</p> <p>Cadarnhaodd y Cyfarwyddwr Corfforaethol – Addysg, Blynyddoedd Cynnar a Chymorth i Deuluoedd fod yr amcan hwn yn faes yr anelir at ei wella yng Nghynllun Strategol Addysg statudol 10 mlynedd Cymru yn ogystal ag yn Adroddiad Arolygu Awdurdodau Lleol 2019.</p> <p><b><u>PENDERFYNWYD:</u></b></p> <p style="text-align: right;">Bod y Cabinet:</p> <ol style="list-style-type: none"> <li>1. Wedi cymeradwyo Polisi Derbyn Ysgolion 2027–2028 (yn Atodiad A); ac</li> <li>2. Wedi cydnabod mabwysiadu Trefniadau Derbyn Cydlynol Ysgolion 2028–2029 (Atodiad B).</li> </ol>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>3 Chwefror 2026</p>

**594. Rhaglen Moderneiddio Ysgolion: Ysgol Gychwynnol a Gofal Plant Cyfrwng Cymraeg Porthcawl**

<p>Y Penderfyniad a Wnaed</p>	<p>Cyflwynodd yr Aelod Cabinet – Gwasanaethau Addysg ac Ieuenctid adroddiad, a'i bwrpas oedd ceisio cymeradwyaeth y Cabinet i wahodd tendrau ar gyfer cynllun Ysgol Gychwynnol Cyfrwng Cymraeg a Gofal Plant Porthcawl, gyda dyfarniad y contract yn amodol ar y Cyngor yn cael cymeradwyaeth ariannol gan Lywodraeth Cymru ar gyfer elfen gofal plant y cynllun (ni ddyfernir y contract hyd nes y cadarnheir y cyllid ac y rhoddir caniatâd cynllunio).</p> <p>Nododd yr Arweinydd fod Llywodraeth Cymru yn mynd i ariannu'r prosiect yn llawn, ond gofynnodd, fodd bynnag, a oedd dyddiad agor arfaethedig wedi'i bennu ar gyfer yr ysgol newydd eto.</p> <p>Dywedodd y Rheolwr, Cymunedau Dysgu Cynaliadwy fod dyddiad agor yr ysgol wedi'i fwriadu, i ddechrau,</p>
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	<p>ar gyfer Medi 2026, ond mae hyn bellach wedi'i ohirio oherwydd bod caniatâd cynllunio ar gyfer yr ysgol yn dal i gael ei ddisgwyl yn ogystal ag oedi hefyd i elfen gofal plant y cynllun.</p> <p>Gofynnodd aelod faint o staff FTE fydd yn yr ysgol.</p> <p>Cadarnhaodd y Rheolwr, Cymunedau Dysgu Cynaliadwy fod hyn yn cael ei adolygu ar hyn o bryd gan gorff Llywodraethu'r Ysgol.</p> <p>Nodwyd na fyddai plant ardal Porthcawl bellach yn gorfod teithio i Ysgol y Ferch o'r Sgêr yng Ngogledd Corneli ar gyfer addysg cyfrwng Cymraeg pan fydd yr ysgol newydd yn agor.</p> <p>Gofynnodd y Dirprwy Arweinydd beth fyddai'r gost o ran llithriant y cynllun.</p> <p>Cynghorodd y Rheolwr, Cymunedau Dysgu Cynaliadwy y byddai'n edrych ar ymateb addas i'r cwestiwn hwn ac yn dod yn ôl at yr aelod y tu allan i'r cyfarfod.</p> <p><u>PENDERFYNWYD:</u> Bod y Cabinet wedi rhoi cymeradwyaeth i wahodd tendrau ar gyfer cynllun Ysgol Gychwynnol a Gofal Plant Cyfrwng Cymraeg Porthcawl, gan ddyfarnu'r contract yn amodol ar i'r Cyngor gael cymeradwyaeth am gyllid gan Lywodraeth Cymru ar gyfer elfen gofal plant y cynllun.</p>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>3 Chwefror 2026</p>

**595. Monitro Cyllideb 2025–2026 – Rhagolwg o Refeniw Chwarter 3**

<p>Y Penderfyniad a Wnaed</p>	<p>Cyflwynodd yr aelod o'r Cabinet – Cyllid a Pherfformiad adroddiad er mwyn rhoi'r wybodaeth ddiweddaraf i'r Cabinet ar sefyllfa ariannol refeniw y Cyngor ar 31 Rhagfyr 2025.</p> <p>Cadarnhaodd yr adroddiad:-</p> <ul style="list-style-type: none"> <li>• Y gyllideb refeniw net ar gyfer 2025–26 yw £383.226 miliwn.</li> </ul>
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	<ul style="list-style-type: none"> <li>• Mae'r sefyllfa gyffredinol ar ddiwedd y flwyddyn a ragwelir ar 31 Rhagfyr 2025 yn danwariant net o £9.256 miliwn (2.4% o'r gyllideb refeniw net).</li> <li>• Rhagwelir bod tanwariant o £8.652 miliwn ar gyllidebau ledled y Cyngor. Mae hyn yn ymwneud yn bennaf â llog ychwanegol a ragwelir o fuddsoddiadau cyfredol (£1.599 miliwn) ac arbedion ar daliadau Isafswm Darpariaeth Refeniw (MRP) yn dilyn y newid yn y polisi ar gyfrifo MRP (£1.004 miliwn), grant ychwanegol gan Lywodraeth Cymru tuag at ddyfarniad cyflog athrawon 2025–26 ynghyd â dyfarniadau cyflog y Cydgyngor Cenedlaethol (NJC) a gadarnhawyd yn is na'r hyn a ddarperir ar eu cyfer.</li> <li>• Mae pwysau sylfaenol ar gyllidebau'r gyfarwyddiaeth yn parhau i fod yn bennaf o fewn Gwasanaethau Cynhwysiant, Gwasanaethau Plant a Chyfarwyddiaeth y Prif Weithredwr.</li> <li>• Roedd y gyllideb a gymeradwywyd ar gyfer 2025–26 yn cynnwys cynigion i leihau'r gyllideb werth cyfanswm o £8.379 miliwn. Mae'r sefyllfa bresennol yn ddiffyg rhagamcanedig ar y targed arbedion o £973,000, neu 10.81% o'r targed gostyngiad cyffredinol.</li> </ul> <p>Nododd y Cabinet elfennau cadarnhaol Rhagolwg Refeniw Chwarter 3 fel y manylir yn naratif yr adroddiad.</p> <p><b>PENDERFYNWYD:</b> Bod y Cabinet wedi nodi sefyllfa'r refeniw rhagamcanol ar gyfer 2025–26.</p>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>3 Chwefror 2026</p>

**596. Rhaglen Gyfalaf – Diweddariad Chwarter 3 2025–26**

<p>Y Penderfyniad a Wnaed</p>	<p>Dywedodd yr aelod o'r Cabinet – Cyllid a Pherfformiad fod paragraff 3.5.3 o'r Rheolau Gweithdrefn Ariannol yn ei gwneud yn ofynnol i'r Prif Swyddog Cyllid adrodd bob chwarter i'r Cabinet a'r Cyngor gyda diweddariad ar y Strategaeth Gyfalaf a'r Dangosyddion Darbodus.</p> <p>Darparodd yr adroddiad:-</p> <ul style="list-style-type: none"> <li>• ddiweddariad am wariant chwarter 3 a'r gwariant a ragwelir ar gyfer 2025–26 ar 31 Rhagfyr 2025, y rhaglen gyfalaf ddiwygiedig ar gyfer 2025–26 i 2034–35 a'r Dangosyddion Darbodus ac Eraill a ragwelir ar gyfer 2025–26.</li> <li>• Roedd Atodiad A i'r adroddiad yn adlewyrchu'r cyllidebau, y gwariant hyd yma a'r gwariant diwedd blwyddyn a ragwelir ar 31 Rhagfyr 2025 ar gyfer y cynlluniau unigol yn 2025–26.</li> </ul>
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	<ul style="list-style-type: none"> <li>• Dangosodd Atodiad B y rhaglen gyfalaf ddiwygiedig ar gyfer 2025-26 i 2034-35, a</li> <li>• Rhoddodd Atodiad D fanylion y Dangosyddion Darbodus ac Eraill gwirioneddol ar gyfer 2024–25 a'r Dangosyddion Darbodus ac Eraill a ragwelir ar gyfer 2025-26.</li> </ul> <p><u>PENDERFYNWYD:</u></p> <p style="text-align: center;">Bod y Cabinet:</p> <ul style="list-style-type: none"> <li>• Wedi nodi diweddariad Chwarter 3 Rhaglen Gyfalaf 2025–26 y Cyngor hyd at 31 Rhagfyr 2025 (yn Atodiad A i'r adroddiad)</li> <li>• Wedi cytuno bod y Rhaglen Gyfalaf ddiwygiedig (Atodiad B) yn cael ei chyflwyno i'r Cyngor i'w chymeradwyo.</li> <li>• Wedi nodi'r Dangosyddion Darbodus ac Eraill gwirioneddol ar gyfer 2024–25 a'r dangosyddion rhagamcanol ar gyfer 2025–26 (Atodiad C).</li> </ul>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>3 Chwefror 2026</p>

**597. Blaenraglenni Gwaith y Cabinet, y Cyngor a'r Pwyllgorau Trosolwg a Chraffu**

<p>Y Penderfyniad a Wnaed</p>	<p>Cyflwynodd y Prif Swyddog – Gwasanaethau Cyfreithiol a Rheoleiddio, AD a Pholisi Corfforaethol adroddiad er mwyn ceisio cymeradwyaeth y Cabinet i gynnwys eitemau ar Flaenraglen Waith y Cabinet ar gyfer y cyfnod 1 Mawrth 2026 i 31 Awst 2026 ac i'r Cabinet nodi Blaenraglenni Gwaith y Cyngor a'r Pwyllgorau Trosolwg a Chraffu ar gyfer yr un cyfnod.</p> <p><u>PENDERFYNWYD:</u></p> <p style="text-align: center;">Bod y Cabinet:</p> <ol style="list-style-type: none"> <li>1. Wedi cymeradwyo Blaenraglen Waith y Cabinet ar gyfer y cyfnod o 1 Mawrth 2026 i 31 Awst 2026 yn Atodiad 1 i'r adroddiad; ac</li> </ol>
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	2. Wedi nodi Blaenraglenni Gwaith y Cyngor a'r Pwyllgorau Trosolwg a Chraffu ar gyfer yr un cyfnod, fel y dangosir yn Atodiad 2 ac Atodiad 3 i'r adroddiad, yn y drefn honno.
Dyddiad y Gwnaed y Penderfyniad	3 Chwefror 2026

**598. Eitemau Brys**

Y Penderfyniad a Wnaed	Nid oedd unrhyw eitemau brys.
Dyddiad y Gwnaed y Penderfyniad	3 Chwefror 2026

**599. Gwahardd y Cyhoedd**

Y Penderfyniad a Wnaed	<u>PENDERFYNWYD:</u> Na ddylid cyhoeddi'r eitem ganlynol gan ei bod yn cynnwys gwybodaeth eithriedig fel y'i diffinnir ym Mharagraffau 14 o Ran 21 a Pharagraff 21 o Ran 5, Atodlen 12A o Ddeddf Llywodraeth Leol 1972, fel y'i diwygiwyd gan Orchymyn Llywodraeth Leol (Mynediad i Wybodaeth) (Amrywio) (Cymru) 2007.  Ar ôl cymhwyso'r prawf budd y cyhoedd, penderfynodd y Cabinet, yn unol â'r Ddeddf, i ystyried yr eitem hon yn breifat, gyda'r cyhoedd yn cael eu heithrio o'r cyfarfod yn ystod yr ystyriaeth honno.
Dyddiad y Gwnaed y Penderfyniad	3 Chwefror 2026

**600. Caffael Eiddo Strategol Canol Tref Pen-y-bont ar Ogwr**

Y Penderfyniad a Wnaed	Bod yr eitem hon wedi'i heithrio ac ni ddylai gael ei chyhoeddi
Dyddiad y Gwnaed y Penderfyniad	3 Chwefror 2026

COFNODION CYFARFOD y Cabinet A GYNHALIWIYD ar ffurf Hybrid yn Siambr y Cyngor – Y Swyddfeydd Dinesig, Stryd yr Angel, Pen-y-bont ar Ogwr CF31 4WB / o bell drwy Microsoft Teams ddydd Mawrth, 17 Chwefror 2026 AM 14:30

Yn Bresennol

Y Cynghorydd – Cadeirydd

N Farr  
M Jones

H M Williams  
G C Haines

E L P Caparros

M J Evans

Yn Bresennol yn Rhithwir

J C Spanswick

Swyddogion:

Jake Morgan  
Oscar Roberts  
Carys Lord  
Janine Nightingale  
Lindsay Harvey  
Laura Griffiths  
Michael Pitman  
Kelvin Barlow

Prif Weithredwr  
Uwch Swyddog Gwasanaethau Democrataidd – Cymunedau  
Cyfarwyddwr Corfforaethol – Cyllid a Thrawsnewid  
Cyfarwyddwr Corfforaethol – Cymunedau  
Cyfarwyddwr Corfforaethol – Addysg, Blynyddoedd Cynnar a Phobl Ifanc  
Rheolwr Grŵp – Gwasanaethau Cyfreithiol a Democrataidd  
Swyddog Cymorth Technegol – Gwasanaethau Democrataidd  
Pennaeth Gofal Cymdeithasol Oedolion

**601. Ymddiheuriadau am Absenoldeb**

Y Penderfyniad a Wnaed	Cafwyd ymddiheuriadau gan y Cyfarwyddwr Corfforaethol – Gwasanaethau Cymdeithasol a Lles.
Dyddiad y Gwnaed y Penderfyniad	17 Chwefror 2026



	<p>Nododd y Dirprwy Arweinydd mai hwn oedd y setliad mwyaf cadarnhaol mewn dros ddegawd, gan symud y cyngor o reoli argyfwng tuag at sefydlogrwydd.</p> <p>Tynnodd yr Arweinydd sylw at gamgymeriad yn yr Asesiad o'r Effaith ar Gydraddoldeb ynghylch a fyddai gwaith yn cael ei wneud gan gontractwyr; cytunodd y Prif Swyddog Cyllid a Pherfformiad i fynd i'r afael â hyn cyn cyfarfod llawn y Cyngor.</p> <p>Nododd yr Aelod Cabinet dros Adnoddau fod adborth y cyhoedd wedi arwain at ostyngiad yn y cynnydd arfaethedig yn y dreth gyngor o 4.9% i 4.7%</p> <p><u>PENDERFYNWYD:</u></p> <p>Bod y Cyngor wedi argymhell MTFS 2026–27 i 2029–30, gan gynnwys cyllideb referiw 2026–27 a'r Rhaglen Gyfalaf 2025–26 i 2035–36, i'r Cyngor i'w cymeradwyo. Argymhellodd y Cabinet hefyd fod yr elfennau penodol canlynol yn cael eu hanfon ymlaen i'r Cyngor i'w cymeradwyo:</p> <ul style="list-style-type: none"><li>• MTFS 2026–27 i 2029–30 (Atodiad 3, gydag Atodiadau A i I).</li><li>• Y gofyniad cyllideb net o £408,148,969 yn 2026–27.</li><li>• Treth Gyngor Band D ar gyfer Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr o £2,007.06 ar gyfer 2026–27 (Tabl 17 o'r MTFS).</li><li>• Cyllidebau 2026–27 fel y'u dyrannwyd yn unol â Thabl 10 ym mharagraff 4.1.3 o'r MTFS.</li><li>• Y pwysau cyllidebol a amlinellir yn Atodiad C ar gyfer 2026–27 i 2029–30.</li><li>• Y gostyngiadau yn y gyllideb a amlinellir yn Atodiad D ar gyfer 2026–27 i 2029–30.</li><li>• Rhaglen Gyfalaf 2025–26 i 2035–36, sydd ynghlwm yn Atodiad G o'r MTFS.</li></ul>
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Dyddiad y Gwnaed y Penderfyniad	17 Chwefror 2026
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**605. Strategaeth Gyfalaf 2026–27**

Y Penderfyniad a Wnaed	<p>Cyflwynodd yr Aelod Cabinet dros Gyllid a Pherfformiad y Strategaeth Gyfalaf ar gyfer 2026–27 i 2035–26. Roedd y Strategaeth yn cynnwys y Dangosyddion Darbodus y mae'r Cyngor yn mesur ei hun yn eu herbyn yn ystod y flwyddyn ariannol a Datganiad Darpariaeth Refeniw Isafswm Blynyddol 2026–27. Roedd y strategaeth yn amlinellu gwariant cyfalaf arfaethedig o £121.8 miliwn ar gyfer y cyfnod 2026–27. Roedd y prosiectau mawr yn cynnwys adnewyddu ysgolion, Pafiliwn y Grand Porthcawl, a grantiau cyfleusterau i'r anabl.</p> <p>Tynnodd yr Arweinydd sylw at fuddsoddiadau o £1.5 miliwn ar gyfer cyfleusterau chwaraeon cymunedol a £7.5 miliwn dros ddwy flynedd ar gyfer adnewyddu priffyrdd sy'n fwy na'r targedau buddsoddi blaenorol.</p> <p>Aeth yr Aelod Cabinet dros Newid Hinsawdd a'r Amgylchedd i'r afael â phryderon y cyhoedd ynghylch dyled y cyngor, gan egluro bod yr holl fenthycy yn ddarbodus sy'n golygu bod yn rhaid iddo fod yn fforddiadwy ac yn gynaliadwy a'i fod yn cael ei ddefnyddio ar gyfer asedau hirdymor fel ysgolion yn unig. Roedd gan y Cyngor hanes cadarnhaol o hyn a chefnogwyd hyn hefyd gan y Prif Swyddog Cyllid a Pherfformiad.</p> <p><u>PENDERFYNWYD:</u> Bod y Cabinet wedi ystyried yr adroddiad ac argymhellodd y dylid cyflwyno Strategaeth Gyfalaf 2026–27 i 2035–36, gan gynnwys Dangosyddion Darbodus 2026–27 i 2035–36 a Datganiad Darpariaeth Refeniw Isafswm Blynyddol (MRP) 2026–27 yn Atodiad A i'w gymeradwyo.</p>
Dyddiad y Gwnaed y Penderfyniad	17 Chwefror 2026

**606. Strategaeth Rheoli'r Trysorlys 2026–27**

Y Penderfyniad a Wnaed	Cyflwynodd y Prif Swyddog Cyllid a Pherfformiad adroddiad ar Strategaeth Rheoli'r Trysorlys ar gyfer
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	<p>2026–27.</p> <p>Mae'r Strategaeth yn amlinellu rheoli benthycyca, buddsoddiadau a llif arian y Cyngor. Ym mis Rhagfyr 2025, roedd gan y cyngor £95.6 miliwn mewn benthyciadau a £56 miliwn mewn buddsoddiadau. Fel y cyfeiriodd yr Aelod Cabinet ato yn gynharach, benthycodd y Cyngor dim ond pan oedd yn fforddiadwy i wneud hynny, yn gynaliadwy ac fe'i defnyddiwyd ar gyfer asedau tymor hir yn unig. Benthycyca Cyngor Bwrdeistref Sirol Pen-y-bont ar Ogwr hefyd oedd yr isaf y pen yn y rhanbarth.</p> <p>Ychwanegodd y Prif Weithredwr nad oedd benthycyca arian erioed ar gyfer rhedeg y Cyngor a'i wasanaethau o ddydd i ddydd, ond yn hytrach ar gyfer buddsoddiadau tymor hir fel ysgolion newydd.</p> <p><b><u>PENDERFYNWYD:</u></b> Bod y Cabinet wedi ystyried Strategaeth Rheoli'r Trysorlys ar gyfer 2026–27 (Atodiad A) ac argymhellodd y dylid cyflwyno'r Strategaeth Rheoli'r Trysorlys i'r Cyngor i'w chymeradwyo ar 25 Chwefror 2026.</p>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>17 Chwefror 2026</p>

**607. Eitemau Brys**

<p>Y Penderfyniad a Wnaed</p>	<p>Nid oedd unrhyw eitemau brys.</p>
<p>Dyddiad y Gwnaed y Penderfyniad</p>	<p>17 Chwefror 2026</p>

Daeth y cyfarfod i ben am 15:15.

I arsylwi'r ddadl bellach a gynhaliwyd ar yr eitemau uchod, cliciwch ar y [ddolen](#) hon.

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<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>CONNECT TO WORK</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CABINET MEMBER FOR REGENERATION, ECONOMIC DEVELOPMENT AND HOUSING  JANINE NIGHTINGALE, CORPORATE DIRECTOR COMMUNITIES</b>
<b>Responsible Officer:</b>	<b>MARTIN MORGANS, HEAD OF PUBLIC REALM</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no impact on the policy framework of procedure rules.</b>
<b>Executive Summary:</b>	<p><b>Connect to Work (CTW) is a new 5 year programme to be delivered by Local Authority areas in England and Wales, with funding being made available from the Department for Work and Pensions (DWP). In South East Wales it has been proposed that the programme be led by Cardiff Council as Grant Recipient Body for 10 Local Authorities in South East Wales.</b></p> <p><b>Bridgend County Borough Council's (BCBC) funding allocation is £4,055,200 from 2025/26 to 2029/30 to support 1,096 participants. It is a voluntary, high fidelity Supported Employment programme connecting work, health and skills support. The aim is to help disabled people, people with health conditions and those with complex barriers, find and stay in work.</b></p>

## 1. Purpose of Report

- 1.1 The purpose of the report is to provide Cabinet with an overview of the UK Government's Connect To Work programme, to agree a proposal that Cardiff Council act as the regional Grant Recipient Body, and to authorise officers to enter into required agreements to deliver Connect To Work in Bridgend County.

## 2. Background

- 2.1 The Get Britain Working White Paper was published in November 2024, which outlines the UK Government's strategy to tackle rising economic inactivity and reform employment support systems. It sets out the ambition to reverse declining employment rates, a direct response to a rise in economic inactivity specifically in relation to long-term sickness and health-related barriers to employment
- 2.2 The Get Britain Working White Paper is structured around 3 main pillars:
- Modern Industrial Strategy and Local Growth Plans; creating more employment opportunities across the UK.
  - Improving Job Quality and Security.
  - Transforming Employment Support Systems
- 2.3 To tackle ill-health as a major driver of economic inactivity, a new employment programme has been launched. The UK Government funded, and Department for Work and Pensions (DWP) managed programme – Connect To Work (CTW) – will support around 100,000 people nationally over the course of the 5 year programme between April 2025 – March 2030.
- 2.4 As of February 2025, there were over 88,000 people claiming Universal Credit and over 43,000 people claiming Employment Support Allowance, in the South East Wales Region. As of September 2025, there were 37,000 people on long-term sick in the Cwm Taf Morgannwg (CTM) Health board footprint. According to NOMIS, in Bridgend, the total population is 147,000 as of 2024, of which the working age population (aged 16-64) is 90, 414. To September 2025, there were 21,500 residents that are economically inactive, of which 10,000 are long-term sick.
- 2.5 The Work and Health Programme has shown a need for dedicated and specialist provision to support this cohort within the region, with over 29,000 people accessing support to go into sustained employment. Referrals to the Work and Health Programme ended in September 2024, with support ceasing for participants completely in July 2026. The CTW programme will become the successor programme.
- 2.6 CTW is a voluntary Supported Employment project which aims to help disabled people, those with health conditions and people with complex barriers to find sustainable work including those with a disability or long-term health conditions (including neurodivergence), mental health needs, substance dependency (drug or alcohol), homelessness or at risk of homelessness, offenders or ex-offenders, carers, victims/survivors of domestic abuse, young people with care experience, refugees, former Armed Forces personnel and/or their families and victims of modern slavery. It also provides support to those who are in work but are at risk of falling out of the labour market.
- 2.7 The programme's primary focus for this voluntary provision will be those of working age who are not required to seek employment as a condition of benefit support. CTW will take a local approach to tackling unemployment by connecting employment, health and skills provision in each local authority area. CTW will complement existing

employment support projects by focussing on people who aren't being reached by mainstream services.

2.8 Unlike many Employment Support projects which focus on preparing individuals to find and stay in work, the CTW programme takes a different approach. As a Supported Employment initiative, it offers specialist, long-term, and tailored support, using a 'place and train' model (individuals are placed in a job role first and then receive on the job training), alongside ongoing assistance and workplace adjustments to help individuals succeed in employment.

2.9 CTW will provide out of work participants with intensive support for up to 12 months. It will also include support for up to 4 months for people in-work who are at risk of losing their job. The support will be based on the well evidenced Individual Placement and Support or Supported Employment Quality Framework fidelity models as appropriate to the participant. Help will include early access to jobs based on job preferences, access to a wide range of support including job and skills matching, on the job training and help to sustain employment, which might include job coaching at work, training, support from a workplace mentor and regular workplace reviews. Support will be provided to the employer as well as the participant. CTW will also provide tailored self-employment support where appropriate.

2.10 CTW delivery will use both models of supported employment:

Supported Employment Quality Framework (SEQF) which is 25% of total numbers (274) for Bridgend who would require support into work and up to 4 months support to sustain work using the more intensive SEQF fidelity model and would support individuals with learning difficulties and autism. This is done by intensively supporting the participant through a five stage project journey, which consists of:

1. Engagement - With a starting point of assuming everyone can work, supported employment proactively engages with individuals
2. Vocational Profiling - Spend time building a rich, strengths-based profile, in partnership with the person, to help match them to the right career.
3. Employer Engagement - Employers are valued as equal partners within the Supported Employment Model and their business requirements need to be at the heart of all conversations. Completing a Job analysis with them to build a picture of their business needs
4. Job Matching - Using the vocational profile and Job analysis supported employment matches the right person into the right role, based on the aspirations of the individual and the business needs of the employer.
5. In-work Support and Career Progression - Personalised support to enable individuals to learn and integrate into every aspect of their job and providing the support the employers need to feel Disability Confident in Action.

Individual Placement and Support (IPS) which is 75% of total numbers (822) for Bridgend which is a 'place train and maintain' model bringing together vocational profiling, employer engagement, job finding and on and off the job support for participants. Employers are supported to take on participants and tailored self employment support is also offered. It uses the IPS fidelity model to support people

with mental health challenges, which also follows the five stage model, but with less intensive support expected.

2.11 CTW will be delivered across England and Wales, split into 43 regions of Local Authorities in England and 4 regions in Wales. Each region is required to have a Grant Recipient Body (GRB) to represent the Local Authorities in that area and distribute grant payments according to the regional funding profile. It is proposed that Cardiff Council is the GRB for South East Wales representing 10 Local Authorities including Bridgend.

2.12 As GRB Cardiff Council will be responsible for developing a regional delivery plan that brings together the delivery approaches of all ten Local Authorities in South East Wales. This plan must outline how the offer will be implemented across the region and must be approved by the DWP before delivery can begin and a grant agreement issued.

2.13 The GRB is responsible for:

- Determining how each Local Authority plans to deliver the programme, whether in-house delivery, commissioning external providers or a combination of both. Cardiff Council will not carry out procurement on behalf of other Local Authorities; DWP's Commercial Team will provide commissioning support.
- Overseeing the implementation of the delivery plan, working with the regional Local Authorities, Health Boards and other local key stakeholders.
- Establishing governance arrangements with the regional Local Authorities.
- Identifying how the region will work together to identify, check and secure eligible and suitable participants.
- Managing the day to day operation of the programme and have overall accountability for the grant funding and how the grant operates.
- Ensuring outcomes for participants are delivered in line with DWP performance indicators.
- Agreeing marketing activities to raise awareness of the programme with employers and potential participants.
- Managing the financial and operational performance, quality and audit of the overall programme across the region.
- Engaging with the DWP, meeting regularly to review performance, operational or financial risks or issues and considering contingency measures

2.14 To enable Cardiff Council to act as the GRB they are establishing a new Central Support Team to coordinate and manage the CTW programme. This team will be funded through an administration fee of 10% of the overall grant allocation for the region. Each local authority will be required to cover their own internal charges from their allocated funding.

2.15 To ensure appropriate governance of the programme, Cardiff Council will create 2 new groups with a structured timetable of meetings

- A Strategic Group will be established to provide oversight on key issues that require escalation, such as persistent underperformance, accountability, partnership working (particularly with the Health Boards and Care Providers), and strategic risk management.
- A Regional Operational Group to ensure smooth and effective delivery of the programme. The group will have programme oversight, performance monitoring, addressing delivery challenges including referrals, stakeholder engagement, compliance and reporting, and feedback to ensure continuous improvement.

2.16 It is proposed that The Enterprise and Employability Programme Manager represents BCBC on the CTW Strategic Group led by Cardiff Council and the Employability Team Leader represents BCBC on the CTW Operational Group.

### 3. Current situation/ proposal

3.1 The funding offer for the Bridgend CTW programme is set out below. There is no option to transfer funds between financial years.

<b>Bridgend Connect To Work 2025/26 to 2029/30</b>						
<b>Total allocation (includes 10% Admin contribution to Cardiff)</b>						
<i>Funding</i>	<b>2025/26</b>	<b>2026/27</b>	<b>2027/28</b>	<b>2028/29</b>	<b>2029/30</b>	<b>TOTALS</b>
Bridgend Allocation	£262,700	£599,400	£1,376,400	£1,320,900	£495,800	<b>£4,055,200</b>
<i>Participants Bridgend</i>	71	162	372	357	134	<b>1096</b>

3.2 It is anticipated that CTW will commence regionally on 1<sup>st</sup> April 2026 so it is not anticipated that any of the 2025-26 Bridgend allocation of £262,700 will be drawn down. Cardiff has a regional allocation for initialisation costs for 2025-26, which can be utilised to prepare for the start of the project, including to train staff prior to a 1<sup>st</sup> April 2026 start, providing those staff have been appointed.

3.3 Work completed on CTW so far:

- In June 2025, Bridgend received the indicative funding shown in the table in paragraph 3.1. above
- In December 2025, Bridgend submitted information to Cardiff Council as GRB, under Delegated Power, to be included in the delivery plan.
- In December 2025, CTW job descriptions were written and submitted for job evaluation
- In January 2026, to be ready for 1<sup>st</sup> April 2026 start, BCBC HR agreed that these jobs could be advertised internally, with successful applicants only being officially appointed once funding is confirmed.

3.4 Foreseeable milestones to complete for CTW, dates of which are not confirmed:

- DWP approve delivery plan
- BCBC Cabinet approve participation in the project.
- Structure of team confirmed and appointed people placed in post
- Project receives a 'Go Live' date from GRB.

#### **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 Employability Bridgend project demonstrates the sustainable development principle by ensuring that by meeting the needs of the present they do not compromise the ability of future generations to meet their own needs this is evidenced through the 5 ways of working:

- Long term – it is important that residents, are provided with support in early adulthood which sets them up for their lives.
- Prevention – working with BCBC colleagues and other agencies to ensure that residents, seeking support are referred to Employability Bridgend for support.
- Integration – It is important that BCBC departments work together to ensure that support for vulnerable residents, is joined up.
- Collaboration – working together to ensure that Employability Bridgend has the right offer to support vulnerable residents, is vital to the Corporate Well-being aims of helping people become more healthy and resilient, and supporting a successful economy.
- Involvement – Employability Bridgend will continue to attend networks, such as the Corporate Parenting Board to ensure that the support offer is up-to-date and shared and the voices of residents in need of support are respected and actioned where possible.

#### **6. Climate Change and Nature Implications**

6.1 There are no climate change or nature implications as a result of this report.

#### **7. Safeguarding and Corporate Parent Implications**

7.1 The implementation of this project will enable the Council to further its Corporate Safeguarding and Corporate Parenting responsibilities by supporting residents of the County Borough, including vulnerable adults and Care Experienced Young People to increase life skills and find and sustain employment to enable more independent lives.

## 8. Financial Implications

8.1 The funding available to BCBC to deliver CTW is set out below.

<b>Bridgend Connect To Work 2025/26 to 2029/30</b>						
<b>Total allocation (includes 10% Admin contribution to Cardiff)</b>						
<b>Funding</b>	<b>2025/26</b>	<b>2026/27</b>	<b>2027/28</b>	<b>2028/29</b>	<b>2029/30</b>	<b>TOTALS</b>
<i>Bridgend</i>	£262,700	£599,400	£1,376,400	£1,320,900	£495,800	<b>£4,055,200</b>
<i>Admin Charge</i>	-£26,270	-£59,940	-£137,640	-£132,090	-£49,580	<b>-£405,520</b>
<i>Final Bridgend Allocation</i>	£236,430	£539,460	£1,238,760	£1,188,810	£446,220	<b>£3,649,680</b>

8.2 Year 1, 2025-26 funds will be foregone, due to the insufficient lead time from DWP to be able to start. This is the same across many local authorities.

8.3 Year 2, 2026-27 funding for this financial year would not allow this project to stand alone. However, coupled with other projects within Employability it becomes viable.

8.4 Year 3, 2027-28, is the first year that this project has sufficient funds to become a standalone project, with a 56% increase in funding.

8.5 Year 4, 2028-29 is very similar to year 3. However towards the end of year 4 the project will start to scale down, with staff contracts coming to end in anticipation of significantly less funding in year 5.

8.6 Year 5, 2029-30, will see project closure. We will enter year 5 with a significantly reduced budget and staff numbers. However, there is a chance that if the project is successful that DWP may renew the contract. This will not be known until towards the end of the project.

## 9. Recommendation(s)

9.1 To agree that Cardiff Council act as the Regional Grant Recipient Body.

9.2 To agree that The Enterprise and Employability Programme Manager represents BCBC on the CTW Strategic Group led by Cardiff Council and the Employability Team Leader represents BCBC on the CTW Operational Group.

9.3 Delegate authority to the Corporate Director Communities, in consultation with the Chief Officer – Legal & Regulatory Services & HR & Electoral and Chief Officer – Finance, Performance and Change to negotiate and enter into a regional CTW funding agreement and any further deeds and documents which are ancillary to the agreement or that are necessary to deliver CTW.

## Background documents

None

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<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>DRAFT SUPPLEMENTARY PLANNING GUIDANCE (SPG): EDUCATIONAL FACILITIES &amp; RESIDENTIAL DEVELOPMENT</b>
<b>Report Owner: Cabinet Member / Responsible Chief Officer</b>	<b>CABINET MEMBER FOR REGENERATION, ECONOMIC DEVELOPMENT AND HOUSING  CORPORATE DIRECTOR – COMMUNITIES</b>
<b>Responsible Officer:</b>	<b>LOUIS PANNELL STRATEGIC PLANNING POLICY TEAM LEADER</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no impact on the policy framework or procedure rules.</b>
<b>Executive Summary:</b>	<b>The purpose of this report is to seek Cabinet approval to consult on a draft Supplementary Planning Guidance (SPG) for Educational Facilities &amp; Residential Development. Subsequent adoption of this SPG will support the effective implementation of the existing planning policy framework contained within the Replacement Local Development Plan adopted March 2024 (RLDP), the Council’s statutory land-use Planning document. It explains in detail the Council’s approach to the provision of educational facilities and outlines how the Council will, where appropriate, seek planning obligations to provide or enhance education and school facilities as part of new residential developments throughout the County Borough.</b>

**1. Purpose of Report**

1.1 The purpose of this report is to seek Cabinet approval to consult on the draft Supplementary Planning Guidance (**SPG**) for Educational Facilities & Residential Development (**Appendix 1**).

**2. Background**

2.1 The Replacement Local Development Plan (**RLDP**), adopted March 2024, plays a key role in ensuring that there is sufficient and satisfactory educational provision for the children and young people generated by new residential developments.

- 2.2 The RLDP makes provision for 8,628 homes to promote the creation and enhancement of sustainable communities across the County Borough over the plan period (2018-2033). As a result, existing educational facilities will be inevitably placed under pressure to accommodate the additional pupils that will be generated through these planned residential developments. Therefore, the Planning system needs to ensure that the necessary steps are taken to avoid facilities being detrimentally affected and that adequate provision is available to cater for the learning needs of the children and young people of Bridgend.
- 2.3 Education capacity was a key consideration during preparation of the RLDP and directly informed the selection of strategic and housing allocations. The overarching strategy of the RLDP prioritises the allocation of large strategic sites of sufficient scale to support the delivery of a new primary school as a minimum. In addition, a number of smaller housing allocations have been allocated and will be required to contribute to improvements to existing educational infrastructure and/or the provision of new supporting infrastructure, where necessary, to ensure such development is acceptable in planning terms. These requirements are specified within Thematic Policies PLA1-5 of the RLDP and the Infrastructure Delivery Plan (**IDP**), providing clarity and certainty on infrastructure requirements associated with future development.
- 2.4 Furthermore, Policy SP10 of the RLDP sets the policy framework to ensure that all residential development proposals are supported by sufficient existing or new infrastructure. In order to mitigate likely adverse impacts and/or to integrate a development proposal, Policy SP10 requires that reasonable infrastructure provision or financial contributions must be provided by developers where necessary and secured by means of planning agreements/obligations where appropriate.
- 2.5 The existing SPG 16: Education Facilities & Residential Development was adopted on 21<sup>st</sup> January 2021, and was prepared to supplement policies contained within the previous Local Development Plan. Whilst the guidance within the existing SPG 16 remains largely relevant, key components of SPG 16 need updating, specifically in relation to pupil yield rates and costs per pupil figures.
- 2.6 The Development Control Committee was informed of the need to revise the Educational Facilities & Residential Development SPG 16 on 2<sup>nd</sup> October 2025. Councillors Hughes, Griffiths and Haines of Development Control Committee, volunteered to champion production of the revised Educational Facilities & Residential Development SPG, and have since been working alongside the Strategic Planning Policy Team Leader to progress the new SPG. The draft SPG attached to this report (**Appendix 1**), represents the result of this workstream.

### **3. Current situation / proposal**

- 3.1 The draft Educational Facilities & Residential Development SPG is intended to explain in detail the Council's approach to the provision of educational facilities and

outlines how the Council will, where appropriate, seek planning obligations to provide or enhance education and school facilities as part of new residential developments throughout the County Borough.

- 3.2 Once adopted, the Educational Facilities & Residential Development SPG will be a material consideration in the determination of all planning applications for residential development, including applications for renewal of consents. It will update and replace the previous SPG16: Educational Facilities & Residential Development (2021).
- 3.3 This draft SPG provides specific guidance on:
- Education requirements for residential developments including thresholds, pupil yields, additional learning needs provision, Welsh medium provision, cost per pupil place, investment in unsatisfactory school accommodation, new schools and how contributions will be used;
  - How contributions are calculated - with a worked example; and
  - The administration of policy through the various planning stages; Section 106, negotiations with developers and how issues surrounding development viability may be considered.
- 3.4 While a large proportion of the existing SPG 16 remains relevant, key areas requiring update include pupil yield rates and associated cost guidance. The latter is particularly necessary as costs have increased since the existing SPG's adoption in 2021.
- 3.5 The pupil yield rates have been revised using evidence from completed new build residential developments in the Borough, including schemes that have delivered a new primary school. Cost guidance has also been updated to reflect the latest cost and size standards published by the Welsh Government.
- 3.6 The preparation and adoption of a revised SPG will ensure that the Council can continue to plan effectively for, and meet the educational needs of children and young people in Bridgend County Borough.
- 3.7 Prior to seeking Council approval for adoption, the Educational Facilities & Residential Development SPG will be subject to a public consultation exercise. Consultations responses will be sought to influence and shape the final version of the new draft SPG. A consultation report will report back to Cabinet, then to Council, to document and provide a general summary of comments, the issues raised, the Local Planning Authority's response and how those responses and comments have influenced the final version of the new draft SPG. Once adopted, the final new SPG will then add weight to the interpretation and application of the policies contained within the RLDP, provide more detailed advice to applicants preparing planning

applications and will become a material consideration in the determination of planning applications.

#### **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 on 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 (Wales) Act 2015 implications and connection to Corporate Well-being Objectives**

5.1 The new SPG for Educational Facilities & Residential Development will provide additional guidance and material weight to support adopted RLDP Policies and seek to provide clarity in respect of their future interpretation, setting out what the Council expects from applicants in respect of satisfying those policies' detailed criteria. This is a key contributory factor to delivering Local Well-being Objective 3: *'Enabling people to meet their potential.'*

5.2 The new SPG, once adopted, will also contribute to the following goals within the Well-being of Future Generations (Wales) Act 2015:

- A prosperous Wales – Ensuring there is sufficient education provision in response to new residential development, directly supporting skills, employability and the future workforce.
- A healthier Wales – Ensuring education provision can be accessed by safe walking routes from new housing developments.
- A more equal Wales – Ensuring equal access to education provision, including Welsh-medium and Additional Learning Needs provision.
- A Wales of cohesive communities – Ensuring that education provision is provided in relation to new residential development to avoid pressure on existing schools.

#### **6. Climate Change and Nature Implications**

6.1 There are no direct climate change and nature implications from this report, although the new SPG, once adopted, will provide additional guidance to ensure that existing education provision can be accessed by safe walking routes from new housing developments. This will help to encourage a sustainable modal shift, reducing carbon emissions that are released from car-borne travel.

#### **7. Safeguarding and Corporate Parent Implications**

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

## **8. Financial Implications**

8.1 There are no financial implications arising from this report.

## **9. Recommendations**

9.1 That Cabinet:

- a) Approve the draft SPG for Educational Facilities & Residential Development (**Appendix 1**) as the basis for public consultation for a minimum period of 6 weeks.
- b) 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 public consultation.
- c) Authorise the Corporate Director – Communities and Group Manager – Planning and Development Services to undertake the public consultation and to report back the results of the public consultation to Cabinet for approval to send the report to Council to seek its approval for the adoption of the final draft SPG.

## **Background documents**

None

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**Bridgend County Borough  
Local Development Plan  
2018-2033**

**Draft Educational Facilities & Residential Development  
Supplementary Planning Guidance  
February 2026**

Cyngor Bwrdeistref Sirol



# Contents

1.0	Introduction.....	1
2.0	Policy and Legislative Context.....	2
3.0	Background .....	6
4.0	Education Provision.....	7
5.0	Developer Contributions .....	12
6.0	Calculating the Requirement .....	17
7.0	Administration of the Policy .....	19
	Appendix A – Safe Walking Routes to Schools.....	25
	Appendix B – Data Inputs Required For Financial Viability Appraisals.....	27
	Appendix C – Data Inputs Required For Financial Viability Appraisals .....	28



## 1.0 Introduction

- 1.1 The purpose of this supplementary planning guidance (SPG) is to explain in detail the Council's approach to the provision of educational facilities and outlines how the Council will, where appropriate, seek planning obligations to provide or enhance education and school facilities as part of new residential developments throughout the County Borough of Bridgend.
- 1.2 This adopted SPG will be a material consideration in the determination of all planning applications for residential development including applications for renewal of consents.
- 1.3 Anyone wishing to submit an application for residential development within the 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:
- Education requirements for residential developments, including thresholds, pupil yields, additional learning needs provision, Welsh medium provision, cost per pupil place, investment in unsatisfactory school accommodation, new schools and how contributions will be used;
  - How contributions are calculated, providing a worked example; and
  - The administration of policy through the various planning stages, Section 106, negotiation with developers and how issues surrounding development viability may be considered.

## 2.0 Policy and Legislative Context

- 2.1 The National Planning Policy context for the provision of educational facilities through the planning system is set out in Future Wales: the National Plan 2040 and Planning Policy Wales (PPW).
- 2.2 **Well-Being of Future Generations (Wales) Act 2015** is a key piece of legislation which aims to further improve the social, economic, environmental and cultural well-being of Wales now and in the longer term. The Act puts in place a ‘sustainable development principle’ which is a duty for public bodies to “act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs”. The Act is underpinned by seven well-being goals, which public bodies must work to achieve (a prosperous Wales, a resilient Wales, a healthier Wales, an equal Wales, a Wales of cohesive communities, a Wales of vibrant culture and thriving Welsh Language and a globally responsible Wales).
- 2.3 **Future Wales: The National Plan** is the National Policy Framework setting out the direction for development in Wales to 2040. Whilst the plan does not address education facilities specifically, it sets the spatial framework within which local and regional development plans can integrate new education provision, in line with national goals around sustainable growth and community well-being.
- 2.4 **Planning Policy Wales (PPW): Edition 12** states the importance of planning authorities developing a strategic and long-term approach to the provision of community facilities (including schools) when preparing development plans. Community facilities should continue to address the requirements of residents in the area and can contribute to a sense of place which is important to the health, well-being and amenity of local communities and their existence is often a key element in creating viable and sustainable places.

- 2.5 Inclusive Design: PPW emphasises the need for good design and placemaking to be incorporated within all development proposals. Good design should place people at the heart of the design process and must also involve the provision of measures that help to reduce the inequality of access to essential services, education and employment experienced by people without access to a car.
- 2.6 Infrastructure: Adequate and efficient infrastructure, including services such as education facilities, is crucial for economic, social and environmental sustainability. It underpins economic competitiveness and opportunities for households and businesses to achieve socially and environmentally desirable ways of living and working. Infrastructure which is poorly designed or badly located can exacerbate problems rather than solving them.
- 2.7 Active and Social Linkages: The Active and Social Places of PPW seeks to actively create sustainable and cohesive communities through development plan policies, including specific allocations, and development management decision making. In particular, policies will: enable sustainable access to housing, employment, shopping, education, health, community, leisure and sports facilities and green infrastructure, maximising opportunities for community development and social welfare; It emphasises that when planning and managing future development, planning authorities need to ensure that residents of existing and new communities have access to jobs and an appropriate range of community facilities including recreation, leisure, health and education.
- 2.8 PPW identifies that planning obligations are useful arrangements to overcome obstacles that may otherwise prevent planning permission from being granted. Contributions may be used to offset negative consequences, to help meet local needs, or to secure benefits which will make development more sustainable. It is essential that arrangements are fair to both the developer and community, that the process is transparent as possible, and that

development plans provide guidance on the types of obligations that the Council may seek.

## 2.9 **Welsh Government’s Sustainable Communities for Learning Programme**

**(SCfL)** formerly known as the *21<sup>st</sup> Century Schools and Education Initiative* is a long-term investment for schools and colleges to develop them as hubs for learning and reduce buildings in poor condition. In January 2022, it adopted the new title SCfL, reflected renewed emphasis on environmental sustainability, community cohesion, and the needs of future generations. The main aims of the programme include:

1. Transforming Learning Environments & Learner Experience
2. Meeting Demand for School Places
3. Improving Condition & Suitability of the Estate
4. Developing Sustainable Learning Environments
5. Supporting the Community

2.10 The SCfL now includes approximately £2.3 billion in combined capital and revenue investment for education infrastructure, delivered through a more flexible “rolling programme” rather than fixed, multi-year cycles.

## 2.11 **Cwm Taf Morgannwg Public Services Board Well-being Plan 2023-2028**

The Well-being Plan (the Plan) outlines how the Public Service Board will work together to deliver the seven wellbeing goals for Wales as referenced in the Wellbeing of Future Generations (Wales) Act. The Plan is framed around tackling inequalities in relation to our lifestyles, our communities, and our environment to improve the well-being for people living here now and building towards a fair future. Two well-being objectives have therefore been developed, which are:

1. Healthy Local Neighbourhoods
2. Sustainable and Resilient Local Neighbourhoods

2.12 This plan recognises the need to help people to access support, services and opportunities in their local neighbourhood such as community buildings like education facilities.

2.13 **Active Travel (Wales) Act 2013** makes walking and cycling the preferred option for shorter journeys, particularly everyday journeys, such as to and from a workplace or education establishment, or in order to access health, leisure or other services or facilities. The Active Travel Act requires local authorities to identify the walking and cycling routes required to create fully integrated networks for walking and cycling to access work, education, services and facilities.



Coleg Cymunedol Y Dderwen

### 3.0 Background

- 3.1 Bridgend County Borough Council (BCBC) receives a high number of applications each year for new housing development. These new residents create a demand for school places and as a result, there may be a need for new educational facilities or an improvement to existing provision. In order to ensure communities are not disadvantaged and that there is sufficient and satisfactory educational provision for the children and young people generated by new developments, the Council will, where appropriate, seek contributions towards providing or enhancing educational facilities. To meet this demand Policy SP10 of the RLDP requires the provision of educational facilities and/or their upgrades.
- 3.2 The Council urges anyone intending to submit an application for residential development within the County Borough to read this SPG. To discuss any issues on a site-specific basis they may contact BCBC in advance of making a planning application for pre-application discussions (see Section 7 at the end of the SPG).



## 4.0 Education Provision

### 4.1 **Corporate Plan and Education and Family Support Directorate Plan**

**2023-2028** sets out the Council's priorities and how the Council will work alongside local people and partners to provide services over the next five years.

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

4.2 Education contributions secured through Section 106 will specifically support the fourth objective. The importance of delivering this objective is also detailed within the Education and Family Support Directorate Plan.

4.3 **Education and Family Support Directorate Plan** identifies the directorate's priorities and commitments, the contribution the directorate will make in the Corporate Plan, and how this will be measured.

4.4 **School Modernisation** – BCBC has embarked on a challenging programme of school modernisation across the County Borough. Creating schools that are fit-for-purpose and valued by their communities is one of the Council's major priorities, as outlined in the Corporate Plan. Throughout the modernisation process, discussions are being held with learners, schools and their

communities. Consideration is being given to the circumstances of each school with the best long-term interests of the children and young people in its locality being the priority while ensuring the current quality of education is maintained. Using the most up-to-date information held by the Council, the effects of the School Modernisation Plan on schools in the vicinity of new residential development will be taken into account at the planning application stage and this will form part of the negotiation process at that time.

- 4.5 **School Catchment Areas** – All primary and secondary schools have geographical catchment areas that are used to administer admission arrangements. Out of the 66 Schools throughout the County Borough, there are 5 Welsh medium schools, 6 voluntary aided, 1 voluntary controlled, 2 special schools and there is 1 pupil referral unit and 1 integrated children's centre. Due to the reduced number, and therefore more sparsely located nature of schools such as Welsh medium schools and special schools, they have wider catchment areas.
- 4.6 It should be noted that the defined catchment areas for schools are sometimes subject to review and the Council recommends that the developer contacts the Council prior to the submission of a planning application to ascertain the most up-to-date catchment information.
- 4.7 In order to make effective use of future contributions, the terms of any future Section 106 agreement should allow for the fact that school catchment areas change and that contributions can be utilised for education facilities within any subsequent school's catchment area within which the development falls at the time of implementation.
- 4.8 **School Capacity** – Welsh Government's Circular No. 021/2011 'Measuring the Capacity of Schools in Wales' describes the method of assessing the capacity of primary and secondary schools and deriving appropriate admission numbers from the capacity. Local Authorities in Wales are required

to set pupil admission numbers (the PAN) based on this methodology as part of their annual determination of admission arrangements for the schools.

- 4.9 The Council holds up-to-date information relating to the capacities of each school, which will be used to determine whether a surplus or deficit in available capacity exists for schools by catchment area. Where a development is likely to place pressure on the existing capacity of schools in a catchment, the Council will seek to negotiate an agreed financial contribution towards the provision of additional school places or facilities.
- 4.10 It is necessary to retain some spare places to enable schools to cope with fluctuations in numbers of pupils in particular year groups. This allows for preference and demand volatility (e.g. year-on-year changes in the birth rate, parental choice etc.). **The level of spare places needed to be retained at schools is unlikely to exceed 10%. Any school which has achieved 90% occupancy would therefore be regarded as having no surplus capacity.**
- 4.11 **School Standards** – Each school has been assessed in terms of any significant investment that is required to bring it up to a satisfactory standard. The Council holds information in connection with the suitability, sufficiency and condition of school buildings throughout the county borough. The standard of school buildings / facilities is a valid consideration for this SPG and Section 106 negotiations as additional numbers of pupils generated by new development could exacerbate arrangements to such an extent that the individual school would not be suitable to accommodate additional pupils. Circumstances are likely to differ significantly between schools depending on their configuration, layout, facilities and use of internal space that may need to be brought back into beneficial use to accommodate new pupils.
- 4.12 The Education (School Premises) Regulations 1999 describe and advise on meeting the minimum standards for the premises of all maintained schools in Wales. The Regulations set minimum standards for all existing and new maintained schools in Wales and they require that the premises of non-

maintained special schools, and approved independent schools suitable for the admission of children who have special educational needs conform to some of the standards contained within them. The surveys undertaken by the Council are based on the above guidance. Current guidance such as Building Bulletins, are also consulted.



## 5.0 Developer Contributions

### 5.1 Thresholds

5.2 Residential developments large enough to place increased pressure on the educational facilities within whose catchment area the development is located will result in the Council seeking an appropriate level of contribution from the developer to accommodate the additional places or bring existing floorspace up to a satisfactory standard.

5.3 Contributions for educational facilities will be sought from all proposed developments with a net gain of 5 or more residential units. In the case of flats or apartments contributions will be required for 15 or more eligible units (i.e. 1 bedroom flats would be excluded from the total number of units).

5.4 Contributions will be sought where:-

- (a) The pupils potentially arising from the development will cause the surplus capacity of local schools within the catchment area to be exceeded; or
- (b) Existing surplus capacity exists to accommodate some or all of the pupils potentially arising from the development, but refurbishment is required to make those places 'fit for use'.

5.5 The only forms of accommodation that will be exempt from contributions are bedsits, 1-bed dwellings, sheltered or elderly accommodation, houses in multiple occupation, hotels, hostels and student accommodation (including residential schools, colleges or training centres).

5.6 Each residential development exceeding the above thresholds will be assessed to determine how many children and young people are likely to be generated from that development and its potential demand and impact on local schools and education facilities.

## 5.7 Pupil Yields

- 5.8 The number of children and young people that will be generated by a proposed housing development is based on the following pupil yield factors:

**Table 1: Number of children generated per dwelling**

Age Group	Number of Children Generated per Dwelling	
	Apartments	Houses
Nursery (under 4)	0.02	0.05
Primary (4-11)	0.10	0.33
Secondary (11-16)	0.06	0.21
Post 16	0.18 x secondary	0.18 x secondary
ALN* – Primary	1.5% of primary	1.5% of primary
ALN* - Secondary	1.5% of secondary	1.5% of secondary

\* ALN = Additional Learning Needs

- 5.9 The pupil yield numbers above are based on the actual take up of school places from completed new build housing developments in the borough, which include the provision of a new Primary School.
- 5.10 The number of pupils generated by a proposed development will be rounded up or down to the nearest whole pupil, and will be assessed against the capacity of the school(s) in whose catchment area(s) the new housing development is proposed. The Council will take account of the number of pupils on the school roll (NOR) to assess whether any surplus capacity exists within the development catchment(s).
- 5.11 Net pupil places required above projected capacity are then calculated by offsetting a developments projected pupil yield against any existing school place surplus. The figures used to calculate the school numbers will be made

available to developers as part of the justification for requesting a financial contribution.

### 5.12 Safe Walking Routes

5.13 Notwithstanding para. 5.11, any surplus school capacity within the development catchment(s) must also be considered in the context of Safe Walking Routes before assuming that capacity can offset a development's projected pupil yield. Where school capacity exists within 2 miles of a new development, walking routes must be considered to be available, which must be assessed by the local authority, in line with the Learner Travel Statutory Provision and Operational Guidance. Further guidance is contained within Appendix A.

### 5.14 Additional Learning Needs (ALN) Provision

5.15 Additional Learning Needs pupils are those taught in either a special school or in a specialist facility on the site of a mainstream school.

### 5.16 Welsh-Medium Provision

5.17 An evaluation of different educational settings (i.e. English-medium, Welsh-medium, faith and voluntary aided schools) is undertaken on historical take up of places in the catchment and how place availability would drive parental choice. The Local Education Authority will determine if contributions will be used for Welsh or English-medium school places, which will be subject to a separate process outside of any planning application.

### 5.18 Costs per Pupil Place

5.19 The costs per pupil place are based upon Welsh Government standardised size and costs for new build schools under the Sustainable Communities for Learning programme.

**Table 2: Cost per Pupil Place**

Year Group	Cost per Pupil Place
Nursery	£25,009
Primary	£25,009
Secondary	£36,318
Post 16	£36,318
ALN – Primary	£75,027
ALN – Secondary	£108,954

5.20 The figures above have been tested against the costs of recently completed new school construction projects and will be regularly reviewed to reflect changes in school building costs. The most up-to-date data will be used at the time of the application. The figures quoted in this SPG are therefore subject to change.

5.21 The Welsh Government’s standardised costs are based on the area in a school building required per pupil, according to the maximum size range of Building Bulletins 98 and 99 for secondary and primary pupils respectively. Once the size is established, costs are applied which account for the following elements:

- Standard build costs (includes sub structure, externals and design costs);
- Furniture, fittings and equipment; and
- ICT

5.22 The costs do not include abnormal build costs associated with gradients, contamination, flood protection works or any associated highway works outside the school boundary.

### 5.23 Investment in Unsatisfactory School Accommodation

5.24 In circumstances where a school does have the capacity with regards to floor space, but the space is considered to be of an unsatisfactory standard to accommodate additional pupils created by a development and would require investment to make it suitable, the costs of bringing this floor space up to standard will be based on 65% of the cost of providing a new additional space.

### 5.25 New Schools

5.26 Where large scale development generates sufficient pupil numbers to justify a new primary or secondary school, there will be a requirement on developers to provide this within the development. If not physically possible to accommodate the facility on site, the developer will be required to make an equivalent financial contribution (e.g. land value and building costs) towards its off-site provision.

### 5.27 Use of Contributions

5.28 The Council will seek contributions for all age groups for all maintained schools where the need arises. Contributions may be used for:

- provision of new classrooms;
- improvements and refurbishment of existing facilities to provide additional capacity;
- provision of additional resources or improvements to existing resources necessitated by the additional demand;
- Provision of any necessary interim school measures which, in some circumstances, might be required when it is not possible to ensure that permanent measures will be in place on time.

## 6.0 Calculating the Requirement

### 6.1 Contribution formula

6.2 Using this guidance the calculations towards providing additional places or investment required to make the school suitable for additional pupils will be worked out using the following formula:

$$\begin{aligned} & \text{(Number of dwellings x Number of children generated per dwelling)} \\ & \quad \times \\ & \quad \text{Cost per pupil place} \\ & \quad + \\ & \quad \text{Any additional related costs*} \\ & \quad = \\ & \text{Total cost of providing school places or investment required to make the} \\ & \text{school suitable to accommodate additional pupils} \end{aligned}$$

\*See Appendix 1 for an indication of potential additional costs

### 6.3 Worked Example

6.4 The following is a worked example using the formula above for a development of 500 houses in an area with no surplus Primary School capacity:

Number of dwellings = 500

Number of primary aged children generated by each dwelling = 0.33

Number of primary aged ALN children = 1.5% of total

Cost per pupil place = £25,009

Cost per ALN pupil place = £75,027

$500 \times 0.33 = 165$  pupils

$165 \times 1.5\% \text{ (ALN)} = 2.47$  (rounded down to 2)

$165 - 2 = 163$  pupils and 2 ALN pupils

163 x £25,009 = £4,076,467

2 x £75,027 = £150,054

Total Contribution = £4,226,521



Brynteg Comprehensive School

## 7.0 Administration of the Policy

### 7.1 Implementation of the Policy

7.2 The implementation of the SPG strategy operates through a number of procedures which are broadly as follows:

### 7.3 Pre-Application Stage

7.4 Prospective applicants for housing developments are strongly advised to contact the Council's Planning Department prior to submitting a planning application. Amongst other matters, this will enable an officer from the Strategic Planning section to liaise with the Education, Early Years and Young People Directorate and outline the anticipated Council's requirements relating to education and other Section 106 contributions. This is to ensure that any anticipated costs relating to provision of education facilities are highlighted prior to, or during, the developer's initial site evaluation exercise.

### 7.5 Application Stage

7.6 Should pre-application discussions not take place, applicants for housing developments will be informed of the requirements for the provision of education facilities following the submission of a planning application. Should a housing development trigger the threshold for a contribution, an applicant will be required to enter into a Section 106 legal agreement with the Council to ensure a contribution is made towards education facilities. A clause will be included within the Section 106 agreement to assess the available capacity at the point the obligation is triggered, ensuring that the required mitigation is accurately aligned with conditions at that time.

7.7 As part of any request for a planning obligation, an applicant will be provided with:

- The number of children potentially arising from the development.
- The capacity of the relevant local schools and the existing number of pupils on the school roll.
- The amount of financial contribution that will be required to create additional school places.

## 7.8 Site Extensions

7.9 In cases where a greater number of dwellings are proposed than originally allocated, additional contributions will be required and secured through subsequent reserved matters applications.

## 7.9 Section 106 Agreements

7.10 Section 106 of the Town and Country Planning Act (TCPA) 1990, as amended by Section 12 of the Planning and Compensation Act (1991), and the Community Infrastructure Levy Regulations 2010 (as amended), is the legislative framework for planning obligations. Any obligation must meet the following three tests:

- 1) Necessary to make the development acceptable in planning terms;
- 2) Directly related to the development; and
- 3) Fairly and reasonably related in scale and kind to the development.

7.11 Furthermore, it should be noted that the CIL Regulations (Regulation 123) restricts the pooling of Section 106 contributions. Regulation 123 states a Section 106 obligation cannot constitute a reason for granting planning permission if five or more separate planning obligations already exist for a specific single infrastructure project (entered into since 6th April 2010). The Council keeps up to date records of all Section 106 agreements entered onto the Planning Register. In discussions with developers, the Council will consider whether the pooling restriction is relevant and seek to ensure that the

development can be appropriately mitigated through planning obligations, whilst ensuring that the pooling restriction is not breached. If a development is not capable of delivering appropriate infrastructure because of the pooling restriction, this may make it unacceptable in planning terms.

7.12 Given the uncertainty regarding the future of the Community Infrastructure Levy Regulations 2010 (as amended) and the devolved powers Welsh Government inherited to modify existing secondary legislation in April 2018, the Council has agreed that progress on CIL is to be placed into abeyance until there is a clear direction from Welsh Government. In the meantime, the Council will continue to use planning obligations secured through Section 106 agreements to secure necessary infrastructure.

### 7.13 Negotiations with Developers

7.14 Negotiations with developers on planning agreements will include:

- the project(s) to which their contributions may be used;
- the timing of the payment of agreed contributions; on large sites payments may be phased by agreement with the authority;
- when contributions will be spent; this will normally be within 5 years of receipt of the final payment.

7.15 In order to make effective use of future contributions, the terms of any future Section 106 agreement should allow for the fact that school catchment areas change and that contributions can be utilised for education facilities within any subsequent school's catchment area within which the development falls at the time of implementation.

### 7.16 Development Viability

7.17 Certain proposals may be eligible for discounted or reduced contributions if it can be proven that the value of the contribution required will jeopardise a

proposal's viability. 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 viability appraisal must therefore be provided, with all inputs and assumptions being robustly evidenced. Unsubstantiated commentary will not be acceptable.

- 7.18 Applicants must robustly demonstrate any site-specific constraints, abnormal costs and/or other viability challenges that could necessitate a deviation. The LPA will work collaboratively with developers in such instances to evaluate site-specific evidence. The LPA reserves the right to reject any development viability claims without comprehensive supporting evidence being provided.
- 7.19 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 this SPG is justifiable.
- 7.20 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 the requirements of the SPG. The primary inputs required to undertake a financial viability appraisal through the DVM are provided in Appendix B.
- 7.21 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 that a reduced education contribution 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.

7.22 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 rechargeable. 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.

7.23 Irrespective of the outcome of a viability appraisal, it may be necessary for the Council to secure a certain level of developer contributions, in order to mitigate the impact of the development. Such a circumstance could be where a failure to make some provision for certain infrastructure items would make the development unacceptable in planning terms, contrary to policy and an unacceptable burden. This will be assessed on a case-by-case basis. In such

circumstances, failure to secure the contributions, deemed necessary to support the proposal, could result in a recommendation of refusal.

#### 7.24 Planning Appeal Decisions

- 7.25 If an appeal is made for reasons other than the provision of an education contribution, the applicant should ensure that an appropriately worded Unilateral Undertaking is signed prior to the determination of any appeal, to make provision for the appropriate contribution. Failure to provide such an undertaking would be likely to result in the Council making an objection on education capacity grounds at appeal.

## Appendix A: Safe Walking Routes to Schools

1.1 Local authorities are under a legal duty to assess the travel needs of learners who walk to school. In making an assessment, local authorities must take into account the following physical route provisions by law:

- Route conditions;
- Traffic;
- Traffic flow on roads;
- Collision history;
- Footpaths;
- Crossing points;
- Canals, rivers, ditches and embankments;
- Lighting;
- Planned changes in the area; and
- Level crossings.

1.2 The intent of the guidance is to ensure that the relationship between learners and traffic is considered by the local authority in making a judgement as to whether the route they are to travel, is available (safe) to walk. It is important therefore that for any new development, pedestrian routes are adequate and meet the physical requirements outlined in the Statutory Provision and Operational Guidance. Particular consideration should be given (but not limited to) the following:

- The provision of continuous adequate footways
- Adequate street lighting
- Adequate sight lines
- Pedestrian refuges where necessary
- Adequate visibility
- Traffic flow and sight lines to allow enough opportunities to cross safely
- Sufficient crossing facilities (for example, zebra, pelican crossings)

- Sufficient pedestrian phases at traffic lights (including necessary refuges)

1.3 A local authority cannot automatically consider a route to be available on the basis it meets some or all of these physical requirements. The local authority will also need to consider any social danger associated with the route, which is also required under the operational guidance. The local authority will also need to consult and consider the views of learners as well as parents/carers in its assessment of the availability of a walked route to school.

1.4 Therefore, developers should ensure that for any new developments, the local authority is able to consider positively associated pedestrian routes, in line with the physical route requirements summarised above, but detailed more comprehensively in the aforementioned Learner Travel Statutory Provision and Operational Guidance.

## Appendix B: Additional Related Costs

1.1 Potential Additional Related Costs include the following:

- Land acquisition
- Associated infrastructure requirements (e.g. major highway infrastructure or excessive ground levelling requirements)
- Temporary accommodation
- Initial cost of school transportation for up to 3 years (whilst new accommodation is being built)
- Building regulations
- Preliminary site investigations

1.2 The above highlights those additional related costs referred to that may be necessarily incurred, and which may form part of the contributions sought from the developer by the Council.

## Appendix C – 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 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<sup>2</sup>, 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) Section 106 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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<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>SOCIAL SERVICES AND WELLBEING PARTNERSHIP ARRANGEMENT FOR DEMENTIA TRAINING</b>
<b>Report Owner / Corporate Director:</b>	<b>CORPORATE DIRECTOR SOCIAL SERVICES AND WELLBEING  DEPUTY LEADER AND CABINET MEMBER FOR SOCIAL SERVICES, HEALTH AND WELLBEING</b>
<b>Responsible Officer:</b>	<b>KELVIN BARLOW – HEAD OF ADULT SOCIAL CARE</b>
<b>Policy Framework and Procedure Rules:</b>	<b>This report is proposing a suspension of the Council’s Contract Procedure Rules.</b>
<b>Executive Summary:</b>	<b>This report seeks Cabinet approval to enter into a Partnership Agreement with Cwm Taf Morgannwg University Health Board with the objective of collaboration to support the health and social care workforce through joint learning and development activity.</b>

## 1. Purpose of Report

- 1.1 The purpose of this report is to request Cabinet approval to enter into a partnership agreement with Cwm Taf Morgannwg University Health Board (CTMUHB) with the objective of supporting effective collaboration of the health and social care workforce through joint learning and development activity in order to improve outcomes for people affected by dementia. This partnership agreement requires a suspension of the Council’s Contract Procedure Rules (CPRs).

## 2. Background

- 2.1 In March 2021, Cabinet approved entering into a Partnership Agreement with CTMUHB, and suspending the Council’s CPRs, in respect of the requirements relating to the procurement of the dementia training and development provision which CTMUHB provide through the Partnership Agreement.
- 2.2 The Partnership Agreement for Dementia Training expired in March 2025 but training has continued to be provided in line with the terms and conditions of the Partnership Agreement to ensure continuity of support to people living with dementia by a well-trained health and social care workforce.
- 2.3 A review has been undertaken which has concluded that the current relationship arrangement provides value for money, through delivering:
- training to assessment teams and care providers

- ongoing support to care providers
- opportunities to develop future joint training and support to informal carers.

2.4 Such a range of benefits, in their entirety, could not be secured by formal tendering for a commissioned training provider. Neither would it be possible to secure the training element alone at the same level of service at a comparative cost. Market analysis has been undertaken indicating it has not been possible to identify a provider who would be able to deliver the required model. The partnership approach supports the principles of co-operation, partnership and integration which are key requirements of Welsh Government legislation and codes of practice.

2.5 A formal partnership arrangement supports effective collaboration for integrated health and social care solutions for priority population groups under Part 9 of the Social Services and Well-being (Wales) Act 2014. Converting the current arrangement to a formal partnership will secure the quality of care delivered, cost benefits, added value, and maintain consistency. This is therefore a strategic approach to supporting workforce development activities and training in order to guide and inform local delivery of care and support to people living with dementia and their carers, whether supported at home, in a care home, or in hospital.

2.6 The proposed partnership is underpinned by the principles of co-operation, partnership and integration embedded in the following:

**The Social Services and Well-being (Wales) Act 2014** – which provides for core principles including prioritising individual voice and control, focusing on prevention and early intervention, and promoting well-being, co-production, and multi-agency collaboration.

**The principles of the Good Work Framework - Dementia Learning and Development Framework for Wales 2016** – provides a structure to promote the wellbeing of people with dementia, carers and the people who support them through a person-centred, strengths-based and outcomes focused approach.

**Dementia Action Plan for Wales 2018-22 and the Draft Dementia Strategy 2026-2036** – the Action Plan set out a clear strategy for Wales to become a dementia-friendly nation that recognises the rights of people with dementia to feel valued and live as independently as possible in their communities. Currently, the Welsh Government are consulting on a new Dementia Strategy 2026-2036 designed to succeed the 2018–2022 Action Plan. Its vision is for Wales to be a nation where people living with dementia are respected, empowered, and supported to live independently with dignity.

2.7 The proposed Partnership Agreement will provide a cohesive approach within the principles of co-operation, partnership and integration embedded, within the above policy approaches, to:

- improve care and support, ensuring people have more say and control;
- improve outcomes and health and well-being;
- provide co-ordinated, person-centred care and support;
- make more effective use of resources, skills and expertise; and
- improve the efficiency and effectiveness of service delivery.

### **3. Current situation/proposal**

- 3.1 The proposed arrangement will ensure that there is high quality, effective learning and development for the health and social care workforce supporting individuals living with dementia.
- 3.2 The proposed arrangement is delivered as a public sector partnership and will provide a cost effective, sustainable collaboration which ensures that BCBC and CTMUHB workforce have a consistent approach to dementia delivery to the residents of Bridgend County Borough and the Cwm Taf Morgannwg region.
- 3.3 The Dementia Care Training Team staff are highly qualified and experienced dementia care practitioners, experienced trainers, and their knowledge and expertise is informed by research.
- 3.4 BCBC continues to work with the Positive Approach to Care (PAC) model to enhance the quality of dementia care provided by staff across the Cwm Taf Morgannwg region.
- 3.5 As part of the collaboration agreement with CTMUHB, the health board will be providing training and development to support and develop the dementia care workforce in Bridgend through a partnership agreement. Entering into the partnership agreement requires the suspension of the Council's Contract Procedure Rules. Cabinet should be aware that in entering into this collaboration agreement the Council is exposed to the risk of potential challenge from other providers of such services. Legislative provisions exist that allow local authorities to collaborate to provide services but they do not overrule the procurement obligations. They do however reduce the overall potential for a challenge, as collaboration is a commonly used tool for the provision of services.
- 3.6 Subject to the Cabinet's approval, it is intended that the Council enter into a partnership agreement with Cwm Taf Morgannwg University Health Board for the provision of dementia training from 1st April 2026 for a term of 3 years at a cost of £20,173 per annum equivalent to £60,519 over the Agreement duration.

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

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

- 5.1 A summary of the Well-being of Future Generations (Wales) Act 2015 assessment is listed below:

<b>Long-term</b>	will enable continuity of the service to provide consistent skills based support to care staff who will be supporting an increasing number of people living with dementia.
<b>Prevention</b>	the service supports and encourages staff to deliver care that enables people to continue to live as independently as possible within their environment.
<b>Integration</b>	service providers will continue to work with individuals to enable continuation of support in their environment.
<b>Collaboration</b>	the service will continue to support and encourage staff to collaborate with individuals whom they support
<b>Involvement</b>	the service supports and encourages staff to work with individuals to be involved in decisions about the delivery of their care and support.

## **6. Climate Change and Nature Implications**

6.1 There are no specific implications of this report on climate change or nature.

## **7. Safeguarding and Corporate Parent Implications**

7.1 A multi-disciplinary approach will reduce risk and enhance safeguarding.

## **8. Financial Implications**

8.1 The anticipated cost of the contract over a three year period is estimated to be £60,519 for the proposed partnership agreement duration of three years. The budget is within the core budgets for the service and provides value for money.

## **9. Recommendations**

9.1 It is recommended that Cabinet:

- Notes the informal arrangement and approves entering into the partnership agreement with CTMUHB and suspends the relevant parts of the Council's CPRs in respect of the requirements relating to the procurement of the dementia training and development provision which CTMUHB shall fulfil;
- Delegates authority to the Corporate Director – Social Services and Wellbeing, to approve the final terms of the collaboration agreement with CTMUHB on behalf of the Council and to arrange execution of the collaboration agreement on behalf of the Council, subject to such delegated authority being exercised in consultation with the Chief Officer – Legal & Regulatory Services and HR & Electoral.

### **Background documents:**

None

# Agenda Item 7

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>TREASURY MANAGEMENT QUARTER 3 REPORT 2025-26</b>
<b>Report Owner: Responsible Chief Officer/ Cabinet Member</b>	<b>CABINET MEMBER FOR FINANCE AND PERFORMANCE  CORPORATE DIRECTOR – FINANCE AND TRANSFORMATION</b>
<b>Responsible Officer:</b>	<b>NIGEL SMITH GROUP MANAGER – CHIEF ACCOUNTANT</b>
<b>Policy Framework and Procedure Rules:</b>	<b>Paragraph 23.5 of the Council’s Financial Procedure Rules require the Chief Finance Officer to report quarterly to Cabinet, summarising borrowing and investment activity and indicating compliance with any statutory or Council approved guidelines together with a half yearly and an annual report to Council.</b>
<b>Executive Summary:</b>	<p><b>The report provides an update of Treasury Management activity for the period 1 April 2025 to 31 December 2025.</b></p> <p><b>As at 31 December 2025 the Council had £93.50 million of long term debt, £2.15 million of Salix loans (mostly interest free), £14.85 million of other long term liabilities and £56.95 million of investments. The overall net debt position at 31 December 2025 was £53.55 million.</b></p> <p><b>The average interest rate for debt as at 31 December 2025 was 4.62%. For investments it was 3.66%.</b></p> <p><b>The Council has a manageable maturity structure of borrowing, with its current debt repayable at various points over the next 30 years, the next repayment being due in March 2026.</b></p> <p><b>The Council is required to set and report against Treasury Management Indicators, details of which are included in Appendix A. These show that the Council is operating within its approved limits.</b></p> <p><b>The Council has complied with the Chartered Institute of Public Finance and Accountancy’s Treasury Management in the Public Services Code of Practice and Welsh Government Investment Guidance during the period.</b></p>

## **1. Purpose of Report**

- 1.1 The purpose of this report is to update the Cabinet on the treasury management activities for the period 1 April 2025 to 31 December 2025.

## **2. Background**

- 2.1 Treasury Management is the management of the Council's cash flows, borrowing and investments, and the associated risks. The Council is exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of financial risk are therefore central to the Council's prudent financial management.
- 2.2 Treasury risk management at the Council is conducted within the framework of the Chartered Institute of Public Finance and Accountancy's Treasury Management in the Public Services: Code of Practice 2021 edition (the TM Code), which requires the Council to approve a Treasury Management Strategy before the start of each financial year, and, as a minimum, a semi-annual and annual treasury outturn report. The TM Code also requires the Council to set a number of Treasury Management Indicators, which are forward looking parameters, and enable the Council to measure and manage its exposure to treasury management risks, and these are included throughout this report. Welsh Government (WG) guidance issued in November 2019 on Local Authority Investments requires the Council to approve an Investment Strategy before the start of each financial year. This report fulfils the Council's legal obligation under the Local Government Act 2003 to have regard to both the CIPFA Code and the Welsh Government Guidance.
- 2.3 The CIPFA Prudential Code for Capital Finance in Local Authorities (2021 Edition) (Prudential Code) includes a requirement for Local Authorities to provide a Capital Strategy, which is a summary document approved by full Council covering capital expenditure and financing, treasury management and non-treasury investments. The definition of investments in the revised Prudential Code covers all the financial assets of the Council as well as other non-financial assets which the authority holds primarily for financial return. The Council's Capital Strategy 2025-26 complied with CIPFA's requirement and included the Prudential Indicators along with the details regarding the Council's non-treasury investments. The Capital Strategy and Treasury Management Strategy should be read in conjunction with each other as they are interlinked, as borrowing and investments are directly impacted upon by capital plans, and both were approved by Council on 26 February 2025.
- 2.4 The Council's treasury management advisors are Arlingclose. The current services provided to the Council include:
- advice and guidance on relevant policies, strategies and reports
  - advice on investment decisions
  - notification of credit ratings and changes
  - other information on credit quality
  - advice on debt management decisions
  - accounting advice
  - reports on treasury performance
  - forecasts of interest rates
  - training courses

### **3. Current situation / proposal**

#### **3.1 External Context – Economic Background**

- 3.1.1 UK consumer price inflation (CPI) rose by 3.4% in the 12 months to December 2025, up from 3.2% in November 2025. On a monthly basis, CPI rose by 0.2% in December 2025, after falling by 0.4% in November. The annual Core CPI rate (excluding food, energy, tobacco, alcohol and owner-occupied housing) was 3.2% in December 2025, the same as November 2025.
- 3.1.2 Data released during the period showed the UK economy expanded by a modest 0.2% in Quarter 3, following an increase of 0.7% in the previous period. Predictions of a modestly growing economy were echoed by the Office for Budget Responsibility in its Economic and Fiscal Outlook published with the Autumn Statement which revised down its estimate of annual GDP to around 1.5% between 2025 and 2030.
- 3.1.3 The Bank of England's Monetary Policy Committee (MPC) voted 5-4 to cut Bank Rate to 3.75% in December 2025, as was expected. Policymakers wanting a cut judged that disinflation was established while those preferring to hold Bank Rate at 4% argued that inflation risks remained sufficiently material to leave it untouched at this stage. Arlingclose, the authority's treasury adviser, held a central view that Bank Rate would be cut further in 2025/26 with most Bank of England policymakers remaining more worried about weak GDP growth than higher inflation.

#### **3.2 Public Works Loan Board (PWLB) Lending Facility Advice, Revised CIPFA Codes**

- 3.2.1 The Council continues to undertake its duties in line with the current guidance for the PWLB lending facility which was significantly revised by HM Treasury in August 2021. Authorities that are purchasing or intending to purchase investment assets primarily for yield, or financial return, will not be able to access funding from the PWLB except to refinance existing loans or externalise internal borrowing. Acceptable use of PWLB borrowing includes service delivery, housing, regeneration, preventative action, refinancing and treasury management.
- 3.2.2 The Council's treasury management activities are undertaken in line with CIPFA's Prudential Code for Capital Finance in Local Authorities and CIPFA's Treasury Management in the Public Services Code. To comply with the Prudential Code authorities must not borrow to invest primarily for financial return. The Prudential Code also states it is not prudent for local authorities to make investment or spending decisions that will increase the Capital Financing Requirement (CFR) unless directly and primarily related to the functions of the authority. Existing commercial investments are not required to be sold, however, authorities with existing commercial investments who expect to need to borrow should review the options for exiting these investments.

#### **3.3 Treasury Management update for period 1 April 2025 to 31 December 2025**

- 3.3.1 The Council has complied with its legislative and regulatory requirements during the period 1 April 2025 to 31 December 2025. The Treasury Management Strategy 2025-26 was approved by Council on 26 February 2025.

3.3.2 A summary of the treasury management activities is shown in the Treasury Management Quarterly report to 31 December 2025 at **Appendix A**. The Council's external debt and investment position on 31 December 2025 is shown in Table 1 below, and more detail is provided in **Appendix A**. A further £5m borrowing has been taken outside the reporting period for a 16 month term, from 12 January 2026 which is not reflected in Appendix A

The balance on investments held at 31 December 2025 was £56.95 million, with an average interest rate of 3.66%. This has reduced from the half year position at 30<sup>th</sup> September 2025 when we held £64.95 million investments with an average interest rate of 3.77% as anticipated following the reduction to the Bank of England Base Rate.

**Table 1: Council's external debt and investment position at 31 December 2025**

<b>Investments for Treasury Purposes</b>	<b>Principal as at 31/03/2025 £m</b>	<b>Principal as at 31/12/2025 £m</b>	<b>Average Rate 31/12/2025 %</b>
<b>External Long Term Borrowing</b>			
Public Works Loan Board (PWLB)	77.04	74.25	4.75
Lenders Option Borrowers Option (LOBO)	19.25	19.25	4.65
Salix Loans (Interest Free)	2.51	2.12	NIL
Salix Loans (Other)	NIL	0.03	2.15
<b>Short Term Borrowing</b>	5.00	NIL	NIL
<b>Total External Borrowing</b>	<b>103.80</b>	<b>95.65</b>	<b>4.62</b>
<b>Other Long Term Liabilities</b>			
Private Finance Initiative*	11.97	11.16	
IFRS 16 Leases	3.69	3.69	
<b>Total Other Long Term Liabilities</b>	<b>15.66</b>	<b>14.85</b>	
<b>Total Gross Debt</b>	<b>119.46</b>	<b>110.50</b>	
<b>Investments for treasury management purposes</b>			
Debt Management Office	18.00	26.00	3.73
Money Market Funds (instant access)	12.75	23.50	3.90
Banks	6.00	7.45	2.63
<b>Total Treasury Investments</b>	<b>36.75</b>	<b>56.95</b>	<b>3.66</b>
<b>Net Debt</b>	<b>82.71</b>	<b>53.55</b>	

\* (PFI) arrangement for the provision of a Secondary School in Maesteg 8.5 years remaining term

3.3.3 The £19.25 million in Table 1 above relates to Lender's Option Borrower's Option (LOBO) loans which have a maturity date of 2054 though these may be rescheduled in advance of this maturity date with the lender having the ability to recall the debt at 2 intervals in the year, July and January. It is anticipated that as interest rates fall the lender is unlikely to exercise this option. The option was not exercised on 22 July 2025 and neither was it exercised on 22 January 2026. There remains some risk that the lender may exercise their option.

- 3.3.4 The Total Other Long Term Liabilities figure of £14.85 million at 31 December 2025 includes £11.16 million for the Private Finance initiative (PFI) arrangement for the provision of a Secondary School in Maesteg and £3.69 million right of use assets.
- 3.3.5 Both the CIPFA Code and Welsh Government Guidance require the Council to invest its funds prudently and to have regard to the security and liquidity of its investments before seeking the highest rate of return, or yield. The Council's objective when investing money is to strike an appropriate balance between risk and return. Investment decisions are made by reference to the lowest published long-term credit rating from Fitch, Moody's or Standard and Poor's to ensure that this lies within the Councils' agreed minimum credit rating.
- 3.3.6 The Council defines high credit quality as organisations and securities having a credit rating of A- (A3 for Moody's) or higher and the Council does not invest in any organisation below this level. Schedule A in **Appendix A** shows the equivalence table for credit ratings for Fitch, Moody's, and Standard and Poor's and explains the different investment grades.
- 3.3.7 There are no long-term investments (original duration of 12 months or more) outstanding as at 31 December 2025. All investments at 31 December 2025 are short term deposits including instant access and notice accounts.
- 3.3.8 The Treasury Management Code requires the Council to set and report on a number of Treasury Management Indicators. The indicators either summarise the expected activity or introduce limits upon the activity. Details of the estimates for 2025-26 set out in the Council's Treasury Management Strategy compared to the actual at 31 December 2025 are shown in **Appendix A** and these show that the Council operated within the approved limits throughout the year to date.
- 4. Equality implications (including Socio-economic Duty and Welsh Language)**
- 4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. This is an information report; therefore it is not necessary to carry out an Equality Impact assessment in the production of this report. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.
- 5. Well-being of Future Generations implications and connection to Corporate Well-being Objectives**
- 5.1 The well-being goals identified in the Act were considered in the preparation of this report. It is considered that there will be no significant or unacceptable impacts upon the achievement of well-being goals/objectives because of this report.

## **6. Climate Change and Nature Implications**

6.1 The Climate Change and nature implications were considered in the preparation of this report. It is considered that there will be no significant or unacceptable impacts upon the environment because of this report.

## **7. Safeguarding and Corporate Parent Implications**

7.1 The Safeguarding and Corporate Parenting implications were considered in the preparation of this report. It is considered that there will be no significant or unacceptable impacts upon safeguarding and corporate parenting because of this report.

## **8. Financial Implications**

8.1 The financial implications are reflected within the report and attached **Appendix A**.

## **9. Recommendations**

9.1 It is recommended that Cabinet:

- Note the treasury management activities for the period 1 April 2025 to 31 December 2025.
- Note the Treasury Management Indicators for the period 1 April 2025 to 31 December 2025 against those approved in the Treasury Management Strategy 2025-26.

## **Background documents**

None



# Treasury Management Quarter 3 Report to 31 December 2025

## EXECUTIVE SUMMARY

- Treasury Management is the management of the Council's cash flows on a day-to-day basis and is carried out in accordance with legislation and Codes of Practice. The Treasury Management Strategy for 2025-26 was approved by Council on 26 February 2025.
- UK consumer price inflation (CPI) rose by 3.4% in the 12 months to December 2025, up from 3.2% in November 2025. On a monthly basis, CPI rose by 0.2% in December 2025, after falling by 0.4% in November.
- The Bank of England's Monetary Policy Committee (MPC) voted 5-4 to cut Bank Rate to 3.75% in December 2025, as was expected. Policymakers wanting a cut judged that disinflation was established while those preferring to hold Bank Rate at 4% argued that inflation risks remained sufficiently material to leave it untouched at this stage.
- Total external borrowing at 31 December 2025 was £95.65 million, a slight reduction from the previous quarter of £95.82 million due to scheduled repayments of several Salix loans.
- Total investments at 31 December 2025 were £56.95 million, a reduction from £64.95 million at the previous quarter.
- Average interest rates on investments as at 31 December 2025 were 3.66%, a reduction from those at 30 September 2025 of 3.77%. This reduction is as expected given the reduction in the Bank of England base rate.
- The Council's investments are diversified across a number of institutions, including Money Market Funds, Debt Management Office and banks. Security of the Council's cash resources is always the primary factor when investing cash resources.
- The Council may need to borrow long term during 2025-26, however, this is dependent on the actual expenditure incurred on capital projects and the use of earmarked reserves. In the short term the Council uses the cash available from earmarked reserves to finance capital expenditure, known as internal borrowing. This is prudent whilst the Council has resources available, but these will need to be replaced with borrowing as the reserves are used.
- The liability benchmark indicates the Council will need to borrow £6.39 million during 2025-26.
- The Council has operated within the approved limits set out in the Treasury Management Strategy 2025-26.

### 1.0 INTRODUCTION

Treasury management activities are the *'management of the organisation's borrowing, investments and cash flows, including its banking, money market and capital market transactions, the effective control of the risks associated with those activities, and the pursuit of optimum performance consistent with those risks.'* (Chartered Institute of Public Finance and Accountancy (CIPFA) Treasury Management in the Public Services: Code of Practice (CIPFA TM Code).

The definition of 'Investments' includes:

- Treasury Management investments (held for the prudent management of financial affairs), and
- non-Treasury Investments, undertaken as part of a Capital Strategy either in the course of provision of services, or made for commercial reasons purely to make a financial gain. These are managed outside of normal treasury management activity.

The Council carries out its treasury management function in accordance with the CIPFA TM Code and the legal obligation under the Local Government Act 2003 to have regard to both the CIPFA TM Code and Welsh Government Guidance.

The Council has an integrated Treasury Management Strategy where borrowing and investments are managed in accordance with best professional practice, which is assessed either from internal expertise or consultation with our external advisers. The Council will look to borrow money if needed to either meet short term cash flow needs or to fund capital schemes approved within the capital programme. Therefore, any actual loans taken are not generally associated with particular items of expenditure or assets.

The Council delegates responsibility for the implementation and regular monitoring of its treasury management policies and practices to Cabinet, and for the execution and administration of treasury management decisions to the Section 151 Officer. The Governance and Audit Committee are responsible for ensuring effective scrutiny of the Treasury Management Strategy and policies and regular reports will be presented to the Committee for their consideration.

## 2.0 ECONOMIC CONTEXT

UK consumer price inflation (CPI) rose by 3.4% in the 12 months to December 2025, up from 3.2% in November 2025. On a monthly basis, CPI rose by 0.2% in December 2025, after falling by 0.4% in November. The annual Core CPI rate (excluding food, energy, tobacco, alcohol and owner-occupied housing) was 3.2% in December 2025, the same as November 2025.

Data released during the period showed the UK economy expanded by a modest 0.2% in Quarter 3, following an increase of 0.7% in the previous period. Predictions of a modestly growing economy were echoed by the Office for Budget Responsibility in its Economic and Fiscal Outlook published with the Autumn Statement which revised down its estimate of annual GDP to around 1.5% between 2025 and 2030.

The labour market continued to ease over the period as unemployment rose, vacancies fell and inactivity remained flat. In the three months to October 2025, the unemployment rate rose to 5.1%, higher than the level previously expected by the Bank of England, while the employment rate slipped to 74.9%.

The Bank of England's Monetary Policy Committee (MPC) voted 5-4 to cut Bank Rate to 3.75% in December 2025, as was expected. Policymakers wanting a cut judged

that disinflation was established while those preferring to hold Bank Rate at 4% argued that inflation risks remained sufficiently material to leave it untouched at this stage.

Arlingclose, the authority's treasury adviser, held a central view that Bank Rate would be cut further in 2025-26 with most Bank of England policymakers remaining more worried about weak GDP growth than higher inflation. In line with Arlingclose's central forecast, Bank Rate was reduced to 3.75% in December. Further cuts are expected in 2026, with the central forecast being that Bank Rate will be eased to around 3.25%.

### 3.0 EXTERNAL DEBT AND INVESTMENT POSITION

The Council's external debt and investments at 31 December 2025 is set out in Table 1 below. The Council held £95.65 million of Long Term Borrowing comprising:

- Public Works Loan Board (PWLB - UK government) at fixed rates and duration
- Lender's Option Borrower's Option (LOBO) which may be rescheduled ahead of their maturity of 22 July 2054 (no call was made in January 2026)
- 2.12 million of Salix interest-free loans and £0.03 million of Salix loans at a rate of 2.15%

The Council has previously raised the majority of its long-term borrowing from the Public Works Loan Board (PWLB), and this was the case when the Council borrowed £5 million for a duration of 16 months in February 2025. The Council will however consider long term loans from other sources including banks, pension funds and other local authorities if appropriate. The Council will also investigate the possibility of issuing bonds and similar instruments, in order to lower interest costs and reduce over-reliance on one source of funding in line with the CIPFA TM Code

At 31 December 2025 the Council had £56.95 million of investments for treasury management purposes and £4.89 million of investments for commercial purposes.

**Table 1: Council's external debt and investment position as of 31 December 2025**

Investments for Treasury Purposes	Principal as at 31/03/2025 £m	Principal as at 31/12/2025 £m	Average Rate 31/12/2025 %
<b>External Long Term Borrowing</b>			
Public Works Loan Board (PWLB)	77.04	74.25	4.75
Lenders Option Borrowers Option (LOBO)	19.25	19.25	4.65
Salix Loans (Interest Free)	2.51	2.12	-
Salix Loans (Other)	NIL	0.03	2.15
<b>Short Term Borrowing</b>	5.00	NIL	-
<b>Total External Borrowing</b>	<b>103.80</b>	<b>95.65</b>	<b>4.62</b>
<b>Other Long Term Liabilities</b>			
Private Finance Initiative*	11.97	11.16	
IFRS 16 Leases	3.69	3.69	
<b>Total Other Long Term Liabilities</b>	<b>15.66</b>	<b>14.85</b>	
<b>Total Gross Debt</b>	<b>119.46</b>	<b>110.50</b>	
<b>Investments for treasury management purposes</b>			
Debt Management Office	18.00	26.00	3.73
Money Market Funds (instant access)	12.75	23.50	3.90
Banks	6.00	7.45	2.63
<b>Total Treasury Investments</b>	<b>36.75</b>	<b>56.95</b>	<b>3.66</b>
<b>Net Debt</b>	<b>82.71</b>	<b>53.55</b>	

Investments for Commercial Purposes	Fair Value as at 31/03/2025 £m	Anticipated return 31/03/2026 £m
Investments	4.890	0.458

\* (PFI) arrangement for the provision of a Secondary School in Maesteg with a remaining term to 30 September 2033

The current profile of repayment of the Council's long-term debt is set out in the Liability Benchmark chart below. The table assumes that the Public Works Loan Board and Lender's Option Borrower's Option loans will be repayable on their maturity date. However, although shown as maturing in 2054, the £19.25 million of Lender's Option Borrower's Option loans may be called sooner than this, the next call date being 22 July 2026.

PWLB lending criteria requires that the Council does not invest purely for financial return if it wishes to access any new PWLB borrowing. The CIPFA TM Code sets out that it is not prudent for local authorities to invest for financial return.

All borrowing by the Council is as a single pool of debt rather than having loans specific to individual schemes. Where a Council finances capital expenditure by debt, it must put aside revenue to repay that debt in later years, known as Minimum Revenue

Provision (MRP). The forecast MRP for 2025-26 as set out in the Capital Strategy is £4.624 million, which includes supported and unsupported borrowing, the PFI for Maesteg School and leases recognised on the balance sheet as from 1 April 2024.

### Liability benchmark

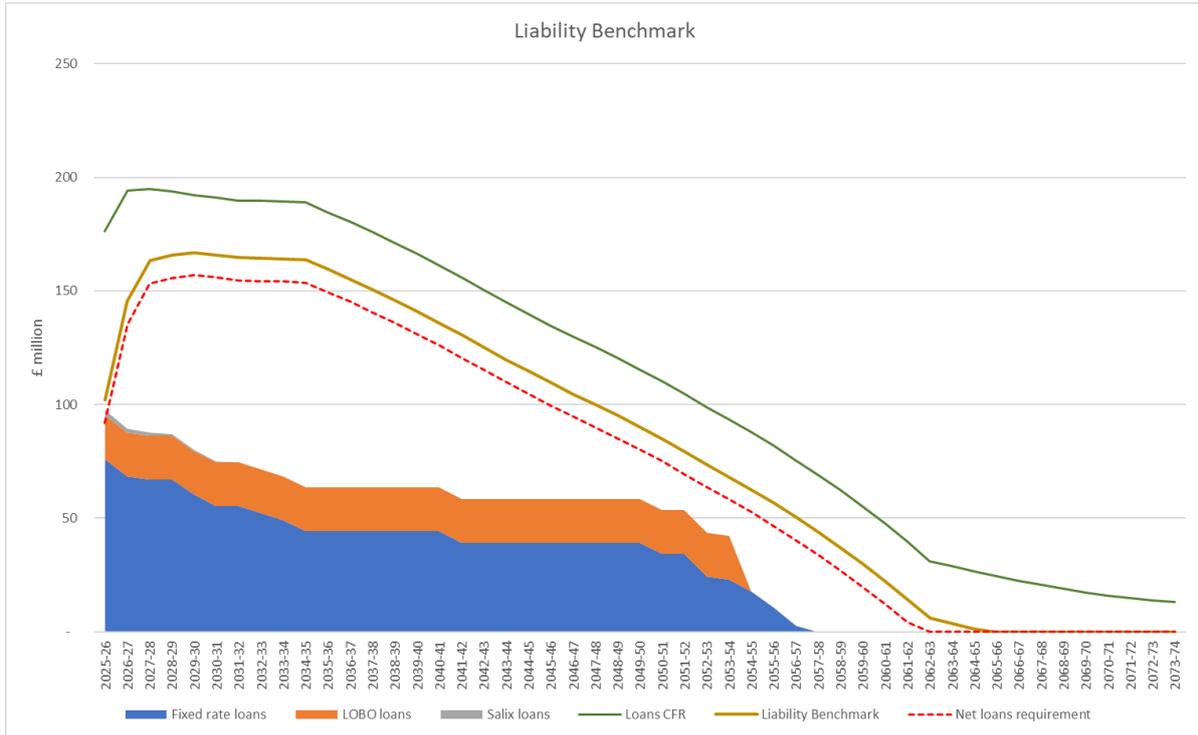
The liability benchmark is a tool which helps to assess the lowest level of borrowing the Council needs, taking into account available cash resources to fund capital expenditure in the short term. A minimum level of investments is factored into the calculation, set at £10 million, which are held as reasonably liquid to ensure the Council has available cash resources to meet day-to-day cash flow requirements. Forecast borrowing needs are based on capital expenditure estimates and available usable reserves. The underlying need to borrow to fund capital expenditure (known as the Capital Financing Requirement or CFR) is the amount of capital expenditure which is not funded via grants, capital receipts or contributions from revenue and earmarked reserves.

Table 2 below shows the Capital Financing Requirement and the calculation of the liability benchmark. It is important to note that the graph is based on the current approved capital programme and the borrowing associated therewith. Any new schemes which require debt financing will increase the CFR and loans requirement.

**Table 2: Liability benchmark**

	31 March 2025 actual £m	31 March 2026 estimate (TMS) £m	31 March 2026 forecast £m	31 March 2027 forecast £m	31 March 2028 forecast £m
Capital Financing Requirement	181.09	183.22	190.71	207.01	206.29
Less: Other debt liabilities	(15.65)	(15.12)	(14.66)	(13.19)	(11.65)
<b>Loans Capital Financing Requirement</b>	<b>165.44</b>	<b>168.10</b>	<b>176.05</b>	<b>193.82</b>	<b>194.64</b>
Less: Balance Sheet Resources	(108.44)	(58.52)	(84.37)	(58.79)	(41.62)
Plus: Liquidity allowance	10.00	10.00	10.00	10.00	10.00
<b>Liability Benchmark</b>	<b>67.00</b>	<b>119.58</b>	<b>101.68</b>	<b>145.03</b>	<b>163.02</b>

The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future and so shape its strategic focus and decision making. The liability benchmark itself represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its **current** capital plans while keeping treasury investments at the minimum level to manage day-to-day cash flow.



The Council may need to borrow long term in the final quarter of 2025-26 although this is based on a number of assumptions including the forecast capital programme expenditure and the level and use of reserves.

The Section 151 Officer will monitor and update the liability benchmark assumptions on an on-going basis and report any significant changes within the treasury management monitoring reports to Cabinet, the Governance and Audit Committee and Council as appropriate. This could be as a result of changes in the level of usable reserves at year end, slippage within the Capital Programme or changes within the working capital assumptions which may affect the Council’s need to take new long-term borrowing.

#### 4.0 BORROWING

As at 31 December 2025 the Council held £95.65 million of Long-Term Borrowing, £93.50 million of which is fixed long term loans as part of its strategy for funding previous years’ capital programmes.

The Council has previously raised the majority of its long-term borrowing from the Public Works Loan Board (PWLB), and this was the case when the Council borrowed £5 million for a duration of 16 months in January 2025. The Council will however consider long term loans from other sources including banks, pension funds and other local authorities if appropriate. The Council will seek to minimise interest costs and reduce over-reliance on one source of funding where appropriate in line with the CIPFA TM Code.

The Council has loans from PWLB maturing within the next 3 financial years that it will need to repay. Given the anticipated level of expenditure within the capital programme over the current and next financial years, it is likely that new borrowing will be required to replace these maturing loans. The value of the loans due to be repaid over the next 3 years is shown in Table 3.

**Table 3: Value of PWLB maturing debt**

	2025-26 £ million	2026-27 £ million	2027-28 £ million
Value of maturing debt	0.918	7.790	1.395

The £0.918 million due for repayment during 2025-26 will be maturing at the end of the current financial year, 31 March 2026. There will be £7.790 million maturing next financial year, 2026-27, £5 million due for repayment on 5 June 2026 and £2.790 million on 31 March 2027. It is likely that the Council will need to borrow to replenish these funds over the forthcoming periods.

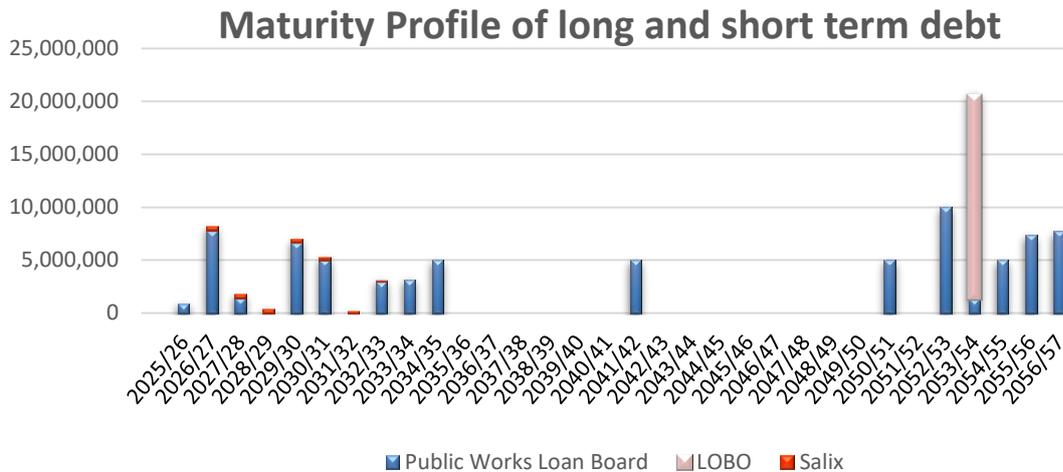
### Maturity structure of borrowing

The maturity structure of borrowing indicator is set to control the Council's exposure to refinancing risk with respect to the maturity of the Council's external borrowing. The limits are set to avoid having large amounts of debt maturing in a short space of time and is the amount of projected borrowing maturing in each period as a percentage of total projected borrowing. Where the maturity date of borrowing is unknown, as in the case of LOBO loans, the maturity should normally be determined by reference to the earliest date at which the lender can require repayment. The £19.25 million of LOBO loans has therefore been included in the 'Under 12 months' category. This table also reflects the PWLB repayable in 2025-26.

**Table 4: Maturity Structure of Borrowing 2025-26**

Maturity structure of borrowing	Upper limit	lower limit	£ million	As at 31 December 2025
Under 12 months	50%	0%	25.37	26.53%
12 months and within 24 months	25%	0%	3.19	3.32%
24 months and within 5 years	25%	0%	9.09	9.50%
5 years and within 10 years	40%	0%	16.61	17.36%
10 years and within 20 years	50%	0%	5.00	5.26%
20 years and above	60%	25%	36.39	38.03%

As can be seen from the above table the maturity structure remains within the limits approved as part of the Treasury Management Strategy 2025-26. The following chart provides the maturity profile of the Council's long term debt.



All the LOBO loans are subject to the lender having the right to change the rate of interest payable during the financial year at either of two trigger points in January and July, with the Council having the right to refuse the change, triggering early repayment and the need to re-finance. This is a manageable risk should repayment be needed during the current financial year as the Council has sufficient cash funds available in the short term, but would, however, need to consider taking out new debt to replace these loans during the current financial year. These loans were not called at the July 2025 call date, and the next call date is 22 July 2026.

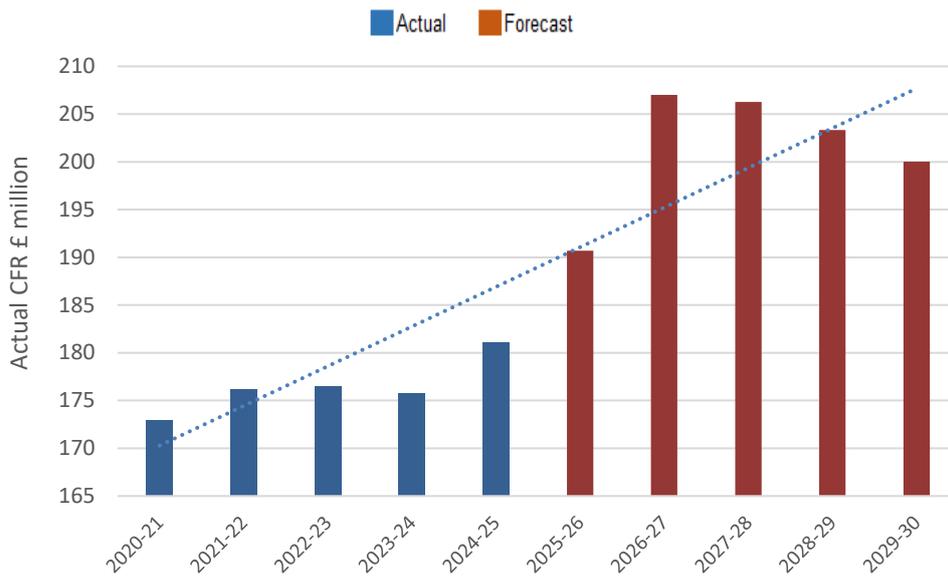
**Table 5: LOBO loans**

Commencement date	Loan value £m	Potential repayment date	Option frequency	Full term maturity
22 January 2004	4.00	22 January 2026	6 months	22 January 2054
22 January 2004	5.00	22 January 2026	6 months	22 January 2054
22 January 2004	10.25	22 January 2026	6 months	22 January 2054

In accordance with the Treasury Management Strategy, the Council is internally borrowing, which is when it uses temporary cash balances it holds in the short term instead of undertaking external borrowing. Internal borrowing is estimated to be £78.56 million as at 31 March 2026. This is shown by the Council’s Capital Financing Requirement (CFR) net of its external level of debt including other long term debt liabilities. The Council’s forecast CFR as at 31 March 2026 is £190.71 million, external borrowing £97.49 million and other long term debt liabilities £14.66 million, which is primarily the PFI Maesteg School scheme plus the lease commitments of right of use assets.

The chart below shows the trend in the CFR based on **current** capital commitments within the approved capital programme. The CFR is anticipated to increase in the current and following year assuming capital expenditure is incurred as currently anticipated. The CFR in future years shows a marginal reduction, however, this is on the assumption that there will be no new schemes added to the capital programme which require debt financing. If new schemes requiring debt financing are added, the CFR will continue to increase.

### Capital Financing Requirement Trend



## 5.0 TREASURY INVESTMENTS

The Council holds treasury investments as a result of temporary cash balances arising from its day-to-day activities. The management of the day-to-day cash requirements of the Council is undertaken in-house with advice from Arlingclose, the Council’s Treasury Management advisors. This may involve temporary borrowing to meet cash-flow needs or temporary lending of surplus funds. Investment balances can fluctuate daily and arise as a result of a range of circumstances, including timing differences of revenue and capital cash flows, reserves and other balances held for future use.

Investments are made in institutions approved by the Council as part of its Treasury Management Strategy and in accordance with investment guidelines issued by the Welsh Government. As part of the Markets and Financial Instruments Directive II, the Council elected for ‘professional’ status, which covers national and regional governments and public bodies. The categories of investments the Council can invest in can be changed with any proposed changes being presented to Council for approval. Treasury investments are made primarily on the basis of ensuring security of the funds invested, whilst managing liquidity, and only then considering a commensurate return on the investment. As at 31 December 2025, the Council held £56.95 million of investments, with a weighted average return (based on the rate of return of each investment over the 3 month period) of 4.00% (£64.95 million at 4.08% as at 30 September 2025). This compares to the average interest rate of investments as at 30 December 2025 of 3.66%, as shown in Table 1 and indicates that returns are falling, as expected when the Bank of England base rate reduces.

Table 6 below shows the investment profile as at 31 December 2025.

**Table 6: Investments by counterparty type**

Investment Category	Balance 1 April 2025	Investments made in period	Investments repaid in period	Balance 31 Dec 2025	Weighted interest rate 1 Oct 2025 to 31 Dec 2025
	£m	£m	£m	£m	%
Government DMO	18.00	499.50	(491.50)	26.00	4.08
Money Market Funds	12.75	25.50	(14.75)	23.50	4.17
Banks (instant access/notice accounts)	6.00	31.50	(30.05)	7.45	3.10
<b>TOTAL</b>	<b>36.75</b>	<b>556.50</b>	<b>(536.30)</b>	<b>56.95</b>	<b>4.00</b>

The following should be noted:

- During the period to 31 December 2025 all investments made were in line with the approved counterparties within the Treasury Management Strategy.
- Investments are diversified over a number of organisations across different sectors, demonstrating a diversified investment portfolio.
- All investments are in sterling and are rated A- and above as per the approved criteria or with a public body.
- The weighted average rates are for all investments made during 1 April 2025 to 31 December 2025.

The overall interest receivable from treasury investments for the period 1 April 2025 to 31 December 2025 was £3.554 million. Interest rates have continued to fall over the period reducing to 3.75% when the Bank of England's Monetary Policy Committee met on 18 December 2025. This is the 6<sup>th</sup> reduction since the interest rates reached their peak of 5.25% in July 2024. The Council will continue to take a cautious approach to investing to ensure as its primary concern the security of any investments made. The risk of default for investments held is considered negligible.

All investments longer than 364 days will be made with a cautious approach to cash flow requirements and advice from the Council's Treasury Management advisors will be sought as necessary. All investments as at 31 December 2025 were short term of less than one year duration, as shown in Table 7 below.

**Table 7: Sums invested for periods longer than a year**

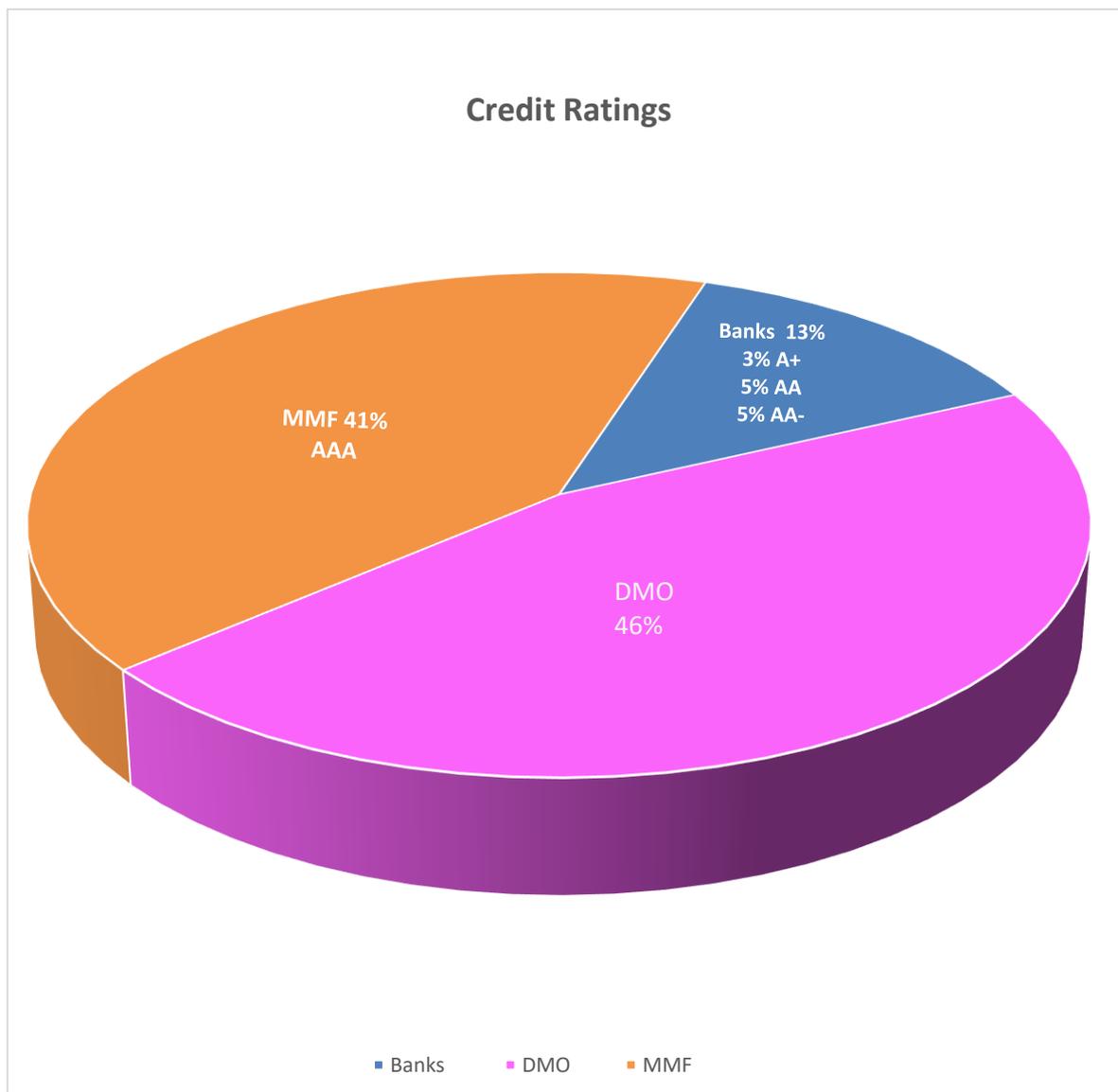
Price risk indicator	TMS 2025-26 £m	Actual £m	Full term maturity
Limit on principal invested beyond financial year end	10	NIL	NIL

The below table details the Council’s investments by counterparty and maturity profile.

**Table 8: Investments by maturity**

Counterparty Category	Instant Access £m	Deposits maturing within 1 month £m	Deposits maturing within 2-3 months £m	Deposits maturing within 4-12 months £m	TOTAL £m
Government DMO	-	26.00	-	-	26.00
Money Market Funds	23.50	-	-	-	23.50
Banks	7.45	-	-	-	7.45
<b>Total</b>	<b>30.95</b>	<b>26.00</b>	<b>0.00</b>	<b>0.00</b>	<b>56.95</b>

The pie chart below summarises the distribution of the Council’s investments by credit ratings. The DMO are the UK government and rated AA-.



## 6.0 INTEREST RATE EXPOSURES

The Council is exposed to interest rate movements on its borrowings and investments. Movements in interest rates have a complex impact on the Council, depending on how variable and fixed interest rates move across differing financial instrument periods. Short term and variable rate loans expose the Council to the risk of short-term interest rate rises and are therefore subject to the Treasury Management indicator below.

The following Table is based on investments at 31 December 2025.

**Table 9: Interest Rate Exposure**

Interest rate risk indicator	£ million
One year revenue impact of a 1% rise in interest rates	(0.107)
One year revenue impact of a 1% fall in interest rates	0.299

It is important to note that this is an indicator, not a limit. It is calculated at a point in time on the assumption that maturing loans and investments would be replaced at rates 1% higher or lower than they are currently, and that the treasury investment and borrowing portfolios remain unchanged over the next 12 months, which in practice is not the case. The figure for the 1% fall in interest rates indicator is not the same figure as the 1% increase (but reversed) as the borrowing relates to variable LOBO loans where it is assumed that the lender would only exercise their option if there was an increase in interest rates. All other borrowing does not have a rate reset in the next year and is with the PWLB at fixed rates.

A comparison of interest payable on borrowings excluding other long term liabilities (PFI and lease interest), and interest income due for the period 1 April 2025 to 31 December 2025 is shown below. Also shown is the interest payable and received for the 12 months July 2024 to September 2025.

**Table 10: Interest**

	Financial Year 2024-25	2025-26 Interest to 31 December 2025	Estimated Interest to 31 March 2026
Interest expenditure payable on long term borrowing	-6.100	-3.662	-4.674
Interest income receivable in period	4.771	3.554	4.265
Net Interest cost	-1.329	-0.108	-0.409

## 7.0 NON-TREASURY INVESTMENTS

The Council recognises that investment in other financial assets and property primarily for financial return, taken for non-treasury management purposes, requires careful investment management. Such activities include investments in subsidiaries and investments in property. A schedule of the Council's existing non-treasury investments (currently limited to owned property) is set out in Table 11 below. Recent PWLB guidance requires that local authorities should review their investment portfolio if they

wish to secure PWLB borrowing but does not require the local authority to sell existing investment assets. This category covers non-financial assets held primarily or partially to generate a profit, primarily investment property. These assets are valued on an annual basis to reflect market conditions and the current value at the time they are valued, otherwise known as Fair Value, which provides security of their value and continued benefit to the Council.

**Table 11: Non-treasury investments**

<b>Non-treasury investments</b>	<b>£ million</b>
Bridgend Science Park - Units 1 & 2	3.070
Waterton Cross Land	0.560
Brynmenyn Industrial Estate Plot 53	0.675
Village Farm Plots 32,119 & 120	0.385
Tyrewise Bridgend	0.200
<b>Total at Fair Value</b>	<b>4.890</b>
<b>Anticipated annual return 2025-26</b>	<b>0.458</b>

The Council considers that the scale of its investment properties is proportionate to the resources of the Council as the investment represents less than 1% of its total long-term assets. In addition, the value of these investments has increased from the previous year.

In accordance with Welsh Government Investment Guidance these are classified as non-treasury investments.

Schedule A – Credit Rating Equivalence Table

Credit Rating Equivalence Table

	Description	Fitch		Moody's		Standard & Poor's	
		Long	Short	Long	Short	Long	Short
<b>INVESTMENT GRADE</b>	Extremely strong	AAA	F1+	Aaa	P-1	AAA	A-1+
	Very strong	AA+		Aa1		AA+	
		AA		Aa2		AA	
	Strong	AA-	Aa3	A+	A-1		
		A+	A1	A			
		A	A2	A-			
	Adequate	A-	A3	P-2	A-	A-2	
		BBB+	F2	Baa1	BBB+		
		BBB	F3	Baa2	BBB	A-3	
<b>SPECULATIVE GRADE</b>	Speculative	BBB-	B	Baa3	P-3	BBB-	
		BB+		Ba1	Not Prime (NP)	BB+	
		BB		Ba2		BB	
	Very speculative	BB-	Ba3	B+			
		B+	B1	B			
		B	B2	B-			
	Vulnerable	B-	B3	C	B-		
		CCC+	Caa1		CCC+		
		CCC	Caa2		CCC		
		CCC-	Caa3		CCC-		
Defaulting	CC	Ca	C	CC			
	C		C	D			

## Schedule B – Arlingclose Economic &amp; Interest Rate Forecast – December 2025

	Current Mar-26			Jun-26	Sep-26	Dec-26	Mar-27	Jun-27	Sep-27	Dec-27	Mar-28	Jun-28	Sep-28	Dec-28
<b>Official Bank Rate</b>														
Upside risk	0.00	0.25	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Central Case	3.75	3.50	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25
Downside risk	0.00	0.00	-0.25	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
<b>3-month money market rate</b>														
Upside risk	0.00	0.25	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50	0.50
Central Case	3.82	3.55	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.35	3.35	3.35
Downside risk	0.00	0.00	-0.25	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50	-0.50
<b>5-yr gilt yield</b>														
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	3.96	3.85	3.80	3.75	3.75	3.75	3.75	3.75	3.75	3.75	3.75	3.80	3.80	3.80
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85
<b>10-yr gilt yield</b>														
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	4.82	4.40	4.35	4.30	4.30	4.30	4.30	4.30	4.30	4.30	4.30	4.35	4.35	4.35
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85
<b>20-yr gilt yield</b>														
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	5.16	5.00	4.95	4.90	4.90	4.90	4.90	4.90	4.90	4.90	4.90	4.95	4.95	4.95
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85
<b>50-yr gilt yield</b>														
Upside risk	0.00	0.40	0.45	0.50	0.55	0.60	0.65	0.70	0.70	0.70	0.70	0.70	0.70	0.70
Central Case	4.74	4.65	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.60	4.65	4.65	4.65
Downside risk	0.00	-0.50	-0.60	-0.70	-0.80	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85	-0.85

- The Bank of England duly delivered on expectations for a December rate cut, but, despite softer economic data over the past two weeks, the minutes highlighted increased caution surrounding both the inflation outlook and the speed of future easing. With a close vote of 5-4 in favour of a rate reduction, this suggests that the bar for further monetary easing may be higher than previously thought despite the possibility of the CPI rate falling to target in 2026.
- Budget policies and base effects will mechanically reduce the CPI rate in 2026, on top of the downward pressure arising from soft economic growth and the looser labour market. However, many policymakers appear concerned that household and business inflation and pricing expectations are proving sticky following recent bouts of high price and wage growth, which may allow underlying inflationary pressure to remain elevated. While, the Bank's measure of household expectations ticked lower in December, it remains above levels consistent with the 2% target at 3.5%.
- While policymakers hold valid concerns, these appear somewhat out of line with current conditions; CPI inflation fell to 3.2% in November, private sector wage growth continued to ease amid the highest unemployment rate since the pandemic, and the economy contracted in October after barely growing in Q3. Business surveys pointed to marginally stronger activity and pricing intentions in December but also suggested that the pre-Budget malaise was not temporary. These data are the latest in a trend suggesting challenging economic conditions are feeding into price and wage setting.
- Risks to the growth and inflation outlook lie to the downside, which may ultimately deliver lower Bank Rate than our central case. However, the minutes suggest that the bar to further rate cuts beyond 3.25% is higher and the near-term upside risks to our Bank Rate forecast have increased. Having said that, we believe inflation expectations will naturally decline alongside headline inflation rates.
- Investors appear to have given the UK government some breathing space following the Budget, with long-term yields continuing to trade at slightly lower levels than in

late summer/early autumn. Even so, sustained heavy borrowing across advanced economies, the DMO's move towards issuing more short-dated gilts and lingering doubts about the government's fiscal plans will keep short to medium yields above the levels implied by interest rate expectations alone.

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<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>BRIDGEND SOCIAL HOUSING ALLOCATION POLICY</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CORPORATE DIRECTOR – FINANCE AND TRANSFORMATION</b>  <b>CABINET MEMBER FOR REGENERATION, ECONOMIC DEVELOPMENT AND HOUSING</b>
<b>Responsible Officer:</b>	<b>RYAN JONES</b> <b>STRATEGIC HOUSING COMMISSIONING MANAGER</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the Policy Framework and Procedure Rules.</b>
<b>Executive Summary:</b>	<b>To seek approval to adopt the revised Bridgend Social Housing Allocation Policy which has been updated following a period of public consultation.</b>

## 1. Purpose of Report

- 1.1 The purpose of this report is to seek Cabinet approval of the revised Social Housing Allocation Policy (SHAP) attached as **Appendix 1**.

## 2. Background

- 2.1 In December 2023 Cabinet approved a Housing Support Programme Strategy 2022-2026 and associated Action Plan. A key commitment within the Action Plan is to review, appraise and amend if required the Council’s Social Housing Allocation Policy (SHAP), taking into consideration the views of key stakeholders.
- 2.2 The Council manages applications to and allocations from the Common Housing Register. Bridgend’s SHAP sets out how the Council and its Registered Social Landlord (RSL) partners manage applications and allocate the majority of social housing within the county borough through the Common Housing Register. The RSLs that operate within Bridgend are Beacon, Hafod, Codi, Trivallis, United Welsh, Valleys to Coast (V2C), and Wales & West.

- 2.3 Bridgend's current SHAP was implemented in 2017. Since this time there have been several changes which have impacted the Policy, including legislation changes and increased pressure on the social housing and homelessness systems, which have been highlighted in several reports to Cabinet.
- 2.4 To support this work an independent consultant, HICO, was commissioned to undertake a review of the current SHAP. This offered impartiality in the review process. HICO's brief was to review and analyse data on current allocations, waiting times, application numbers and outcomes. They were also asked to consider the strategic context in relation to relevant legislation and guidance, the Council's responsibilities and to engage with RSL partners as well as wider agencies and stakeholders.
- 2.5 HICO undertook a desktop review of current arrangements, data analysis and review of practice and policy in Wales, seeking out best practice examples elsewhere. They also undertook interviews with stakeholders, including one to one and group interviews with internal and external stakeholders. An online survey was conducted with people who were currently or had recently been on the Council's Common Housing Register.
- 2.6 Key findings from the review are detailed below:
- There are currently 3,500 households on the Common Housing Register – a huge increase in pre Covid 19 pandemic levels. There is a disparity between demand and stock for all bedroom sizes, but the disparity is significantly greater for 1-bedroom properties and 4-bedroom properties.
  - There is a high demand for ground floor, accessible homes and also for larger homes, with stock of 5 to 8 bedrooms being almost non-existent.
  - Stock shortages, particularly in more sought after areas such as Brackla and Porthcawl force applicants to be housed outside of their preferred area of choice.
  - Due to the pressure on the register and those assessed as having an urgent need to move, those in lower bands face prolonged delays. Demand is so much so that households in Band C, a band currently utilised for those in no housing need, are not likely to receive an offer of accommodation.
  - There is a need to combine a Rapid Rehousing approach into the Common Housing Register, to encourage prevention without incentivising homelessness.
  - There are delays in moving individuals out of supported accommodation, resulting in bed blocking and inefficiencies within the system. This is the case for both care leavers and individuals in wider supported accommodation services. Individuals with restricted areas of choice on their applications can exacerbate these delays.
  - The current exclusions and arrears policy needs to be updated, including with consideration to a clear income and savings threshold to guide eligibility for social housing.
- 2.7 Following consideration of the review, including the key findings detailed above, a new draft SHAP was developed. The Policy was written to comply with the legal requirements of the Housing Act 1996, Housing (Wales) Act 2014, and the

Welsh Government's Code of Guidance for Local Authorities on Allocation of Accommodation and Homelessness.

2.8 Key proposed changes in the draft SHAP are detailed below:

- To encourage best use of existing stock, those willing to move on from high demand properties, including accessible homes, 1 bedroom property's and 4-bedroom property's will be added to the Priority Band.

All households threatened with or experiencing homelessness, including those in temporary accommodation will be added to Band A. This will support homelessness prevention and through flow through temporary accommodation, whilst balancing the need of other households, not incentivising homelessness.

- Those in supported accommodation and care experienced children looking to move on from a care placement will be added to Band A. For these cases, the Council will have the flexibility to make an offer of suitable accommodation in any area within the borough. This will support through flow in supported accommodation, helping to ensure valuable resource is available for those in need.
- Where a care leaver in a care or supported accommodation placement requires accommodation, which would result in the alleviation of wider intensive agency input, they will be added to the Priority Band. This will support the Council's Corporate Parenting agenda and ensure best use of resources.
- The terms of exclusion from the Common Housing Register are updated to ensure applicants are not unfairly and disproportionately penalised for past behaviour. Exclusion on the basis of former tenant debt / rent arrears will move to time-based approach e.g. 8 weeks, rather than an arbitrary sum. This will enable different circumstances to be taken into account and ensure this area of the Policy is not adversely impacted by inflation.
- To ensure social housing is there for those in the most need an income and asset threshold criteria has been added meaning that single applicants or couples with a gross income exceeding £35,000 or savings / assets over £30,000 or families with a gross income exceeding £60,000 or savings / assets over £30,000 will not be eligible to join the Common Housing Register. Similarly, those who own a share of 50% or more in a residential property will not be eligible. Discretion may be applied in cases where strict adherence to these thresholds would unjustly disadvantage individuals.
- To ensure that social housing is exclusively for those in housing need and in acknowledgment that those added to the register with no housing need will likely never receive an offer of accommodation Band C is to be removed.

2.9 On 22 July 2025 Cabinet approved a 12-week public consultation on the draft Social Housing Allocation Policy, which included the proposed changes set out at paragraph 2.8.

### 3. Current situation/ proposal

- 3.1 Following Cabinet approval a formal public consultation period on the draft SHAP was held between 23<sup>rd</sup> July 2025 and 22<sup>nd</sup> October 2025. Links to the online consultation were shared widely with stakeholders and published on Bridgend County Borough Council's (BCBC) website and social media channels.
- 3.2 145 individuals participated in the online survey. All participants were anonymous. Below is a summary of the responses.
- Q1 22.2% agreed that the way priority is decided between the bands is fair and easy to understand. 15.3% were unsure and 62.5% did not agree.
- Q2 48.3% answered yes when asked should any other groups or situations get higher priority than those listed. 24.5% were unsure and 27.3% felt no other groups or situations should get higher priority than listed.
- Q3 When asked to explain answers to the above two questions further there was a wide range of responses. Responses included prioritisation for local residents, veterans in line with the Armed Forces Covenant, those who work, homeless persons, those fleeing domestic abuse, disabled households, families.
- Q4 68.3% agreed that the rules for excluding people are fair. 15.9% were unsure and 15.9% answered no.
- Q5 When asked to explain answers further there was a pattern of responses supporting consequences for things like rent arrears and anti-social behaviour. Others noted that individual circumstances should be considered before considering exclusion.
- Q6 49% answered unsure when asked if the income and savings limits are set at the right level. 20% answered yes and 31% answered no.
- Q7 When asked to explain answers again responses were varied. Some felt that both the proposed income and savings levels are too low, whilst others felt the proposed amounts are too high. Some commented that income thresholds should increase over time.
- 3.3 The draft SHAP was also presented to the Communities, Environment and Housing Overview and Scrutiny Committee on 29 September 2025 for comment and consideration. The Committee made the following recommendations:
- The Communities 'deep dive', consider potential ideas to address the shortfall in the supply of housing, and
  - That the Strategy and Action Plans be updated setting out the steps being taken to urgently address this position.
- 3.4 The draft SHAP was also reviewed by legal counsel who provided an advice note on the Policy.

- 3.5 The Social Housing Allocation Policy at **Appendix 1** has been revised, taking into consideration the comments received during the consultation period. Key changes made to the draft version presented to Cabinet on 22 July 2025 are detailed below:
- Amendments have been made to the eligibility sections to reflect relevant legislation.
  - Households previously proposed to be excluded, including those with high levels of rent arrears, those with no housing need and those exceeding income or savings thresholds are to be added to the Common Housing Register. Band C is to be reinstated to accommodate such cases, with a reduced priority, as opposed to a complete exclusion.
  - To provide a rationale and consideration of wage growth over time the income thresholds have been amended to consider the average (median) gross weekly earnings for Bridgend, as indicated by the latest available Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE).
- 3.6 Following revision the Policy at **Appendix 1** has been subject to a closed consultation period with RSL partners. This took place between 6<sup>th</sup> January 2026 and 23<sup>rd</sup> January 2026. No further amendments are proposed following this exercise. Cabinet should however note that whilst currently V2C are the only RSL to allocate only 75% of their stock via the Common Housing Register, consideration will be given to increasing this. Should V2C agree to increase this percentage then this will be reflected and updated in the SHAP accordingly.
- 3.7 Cabinet are recommended to consider the Social Housing Allocation Policy at **Appendix 1** and approve the same. Subject to approval, there will be a period of mobilisation, which will include implementing changes to I.T software, updating BCBC's website and communication to key stakeholders. A Member Briefing Session will also be provided to update Members on key changes.

#### **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 delivery of and best use of social housing contributes to the following goals within the Well-being of Future Generations (Wales) Act 2015:
- A prosperous Wales – the provision and availability of suitable housing is key to supporting a prosperous Wales by reducing cost to the public purse. Individuals in suitable housing are more likely to achieve wider prosperity through other areas in their lives.
  - A resilient Wales – our SHAP aims to ensure best use of a limited resource increasing the resilience of both individuals supported and the general structures

in place to support the goal of achieving a position where homelessness in Wales is rare, brief and non-recurrent and individuals are accommodated in good quality and suitable accommodation.

- A Wales of cohesive communities – the SHAP looks to achieve cohesive communities through housing allocations which ensure those in most need are supported, whilst balancing the need of sustainable communities.
- A globally responsive Wales – suitable housing is an issue across the globe. The SHAP is a strategic document, which sets out the approach Bridgend will take to support Wales in its efforts around this agenda.

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

## **6. Climate Change and Nature Implications**

6.1 The provision of suitable housing supports the agenda around climate change and nature. The Council's SHAP will help to make best use of a valuable and limited resource. The Common Housing Register helps to inform and shape the development of new housing schemes which will be developed in line with Welsh Government planning and standards requirements, which support moves to tackle climate change.

## **7. Safeguarding and Corporate Parent Implications**

7.1 The provision of suitable housing is a key element of the Council's responsibilities as a Corporate Parent. The SHAP sets out ways in which care experienced children and care leavers will be supported to secure accommodation via the Common Housing Register, if this is deemed to be the most appropriate solution for the individual.

7.2 The new SHAP looks to implement changes which will support the Council in its wider Corporate Parenting responsibilities, through supporting the flow and best use of resources in relation to available care and supported accommodation placements.

## **8. Financial Implications**

8.1 There are no financial implications arising from this report. The cost of mobilisation and implementation for the new SHAP will be met from existing budgets.

## **9. Recommendations**

9.1 It is recommended that Cabinet:

- Approve the Bridgend Social Housing Allocation Policy attached as **Appendix 1**;
- Delegate authority to the Corporate Director – Finance and Transformation to make minor variations to the Policy to allow for any increase in the percentage of Valleys to Coast properties to be allocated via the Common Housing Register.

## **Background documents**

None

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## **Bridgend Social Housing Allocation Policy**



**2025**

**The Council's contact details are:**

Housing & Community Regeneration

Civic Offices

Angel Street

Bridgend

CF314WB

E-mail: [housing@bridgend.gov.uk](mailto:housing@bridgend.gov.uk)

Telephone: 01656 643643

Put 18001 before any of our telephone numbers for the text relay service SMS  
Messaging (for deaf/hard of hearing applicants): 07581 157014

Fax: 01656 668126

This Policy is available in other formats e.g. in large print or in Welsh.

## Bridgend Social Housing Allocation Policy

### 1.0 General Principles

- 1.1. This Allocation Policy sets out how Bridgend County Borough Council (the Council) and its Housing Association Partners allocate the majority of social housing within the county Borough. The Housing Associations that operate within the Bridgend County Borough are Beacon, Hafod, Linc-Cymru, Trivallis, United Welsh, Valleys to Coast (V2C), Wales & West.
- 1.2. These organisations, together with the Council are referred to collectively as the 'Partners' throughout this document.
- 1.3. The table below shows the percentage of vacancies of social rented housing allocated through this Policy:

Housing Association	% of Vacancies
Beacon	100
Hafod	100
Linc-Cymru	100
Trivallis	100
United Welsh	100
Valleys to Coast	75*
Wales & West	100

*\*Valleys to Coast may allocate up to 25% of their vacancies through their own allocation policy.*

- 1.4. This Policy sets out how Partners manage applications from existing tenants wishing to transfer to other social housing providers. It does not cover mutual exchanges or internal transfers made for management purposes.
- 1.5. The Partners are committed to the principles of equality and non-discrimination. All applicants will be treated fairly and in accordance with equal opportunities legislation and good practice.
- 1.6. This Policy recognises the significant shortage of available social housing relative to the growing level of demand. The limited availability of social housing necessitates prioritising housing for applicants who demonstrate the greatest housing need. Consequently, this policy is specifically designed to ensure fairness and transparency in the allocation process, ensuring that social housing resources are effectively targeted towards supporting those most in need.
- 1.7. The aim of the Policy is to balance prioritising those in greatest need and ensuring that there are opportunities for re-housing for those who require it. It is designed to reflect a range of need factors and enable applicants to clearly understand their prospects for re-housing given their needs, circumstances and preferences.
- 1.8. This Policy has been written to comply with the legal requirements of the Housing Act 1996, Housing (Wales) Act 2014, and the Welsh Government's Code of Guidance for Local Authorities on Allocation of Accommodation and Homelessness. It

also makes reference to the Renting Homes (Wales) Act 2016.

- 1.9.** The Council appreciates the importance of offering applicants as much choice as possible regarding their housing options. This supports the development of sustainable communities and enables individuals to express personal preferences. However, given current pressures on stock, the ability of the Council and its Partners to accommodate these preferences may be significantly constrained.
- 1.10.** Where the Council owes a statutory homelessness duty under section 66, 73 and 75 of the Housing (Wales) Act 2014, or an applicant is in supported accommodation, including a care leaver applying directly from a care placement it may make an offer of suitable accommodation in any area within the Council's Borough.
- 1.11.** Applicants will be placed in Bands that reflect their level of housing need. Banding determines their priority for re-housing.
- 1.12.** This Policy is based on the following legal and ethical principles:
  - A recognition to give reasonable preference to certain groups of people as set out in legislation;
  - The principle that social housing properties should be let on the basis of an applicant's housing needs;
  - A commitment to transparency by providing clear information to applicants about their rights and the operation of the Policy
- 1.13.** In accordance with Section 167(2) of the Housing Act 1996, reasonable preference for housing must be given to:
  - all categories of homeless people (within the meaning of Part 2 of the 2014 Act);
  - people who are owed a duty under section 66, 73 or 75 of the 2014 Act;
  - people occupying insanitary or overcrowded housing, or otherwise living in unsatisfactory housing condition;
  - people who need to move on medical or welfare grounds (including disability-related reasons);
  - people who need to move to a particular locality within the Borough where failure to meet that need would cause hardship (to themselves or to others)
- 1.14.** In addition, the Council will give additional preference to those applicants in urgent or exceptional circumstances, including (but not limited to):
  - i. Those owed a homelessness duty as a result of violence or threats of violence likely to be carried out and who as a result require urgent rehousing, including:
    - Victims of domestic or other abuse;
    - Victims of hate incidents;
    - Witnesses of crime or victims of crime who would be at risk of intimidation amounting to violence or threats of violence if they remained in their current homes;
  - ii. Those who need to move because of urgent medical reasons;
  - iii. Applicants who suddenly lose their existing home as a result of a disaster e.g. fire or flood (and consequently owed a homeless duty under the Housing (Wales) Act 2014);
  - iv. Applicants who need to move to suitable adapted accommodation because of a

- serious injury, medical condition or disability which they, or a member of their household, have sustained as a result of service in the Armed Forces;
- v. People who need accommodation as a result of leaving the Armed Forces and the loss of military accommodation (and consequently owed a homeless duty under the Housing (Wales) Act 2014):
  - vi. People under-occupying or over-occupying social housing and wanting to transfer to a property of a more appropriate size
- 1.15.** Discretion may be applied in exceptional circumstances where strict application of this Policy would result in undue hardship or unfairness. Any discretionary decisions will be made by a Housing Manager on its merits as regards the urgency of the need for re-housing and recorded in accordance with internal procedures.
- 1.16.** In compliance with the Data Protection Act 2018 and UK General Data Protection Regulation 2016 (UK GDPR) no information will be disclosed about an applicant either without their express consent or where disclosure without consent is provided for by the legislation. An applicant is entitled to examine information which is held about them whether the information is held on paper or on a computer database. This may exclude information provided by a third party which may not be disclosed. A single disclosure consent form will be provided to applicants as part of the housing application process and will provide authorisation for information to be shared between the Partners.
- 1.17.** This Policy will be subject to periodic review to ensure it remains legally compliant, fair and responsive to housing needs within the borough.

## **2.0 Introduction**

- 2.1.** Everyone can apply to be considered for housing under this Policy. While anyone may apply, not all applicants will be eligible to join the Housing Register. Eligibility is determined by both legal criteria and local policy, as outlined in this document.
- 2.2.** The Council maintains a Housing Register of housing applicants for itself as well as for its Partners who have chosen to adopt this Policy.
- 2.3.** Due to the significant discrepancy between demand and supply of social housing, the Housing Register will prioritise applicants who meet the definition of the reasonable preference categories in the Priority Band, Band A and Band B. (see section 4). It should be noted that due to the demands on social housing applicants may face lengthy waiting times, particularly those placed in Bands C and D.
- 2.4.** All applications for housing will be assessed in line with the procedures set out in this Policy. In considering applications, however, the Council must ascertain if an applicant is eligible for accommodation.
- 2.5.** For further details about eligibility and exclusion please refer to Section 3 of this Policy. It should be noted that the law in relation to eligibility is complex and subject to change. The Council and its Partners will provide up to date information on eligibility and exclusions and advice to applicants as part of the application process.
- 2.6.** Applicants are responsible for ensuring that all information provided in relation to their housing application is accurate and kept up to date. Applicants must notify the Council of any change in their circumstances that may affect their housing application. Failure to do so may result in:

- incorrect banding;
- delay or cancellation of an offer;
- removal from the Housing Register.

### **3.0 Eligibility, Exclusions and Reduced Priority**

#### **Eligibility**

- 3.1.** The Council and its Partners may allocate housing only to applicants who are eligible under UK law. Eligibility is determined primarily by immigration status, but may also affect British citizens. There are two categories of ineligible people.
- 3.2.** The first category of people who are ineligible for an allocation are persons subject to immigration control unless they fall within one of the classes prescribed at Regulation 3 Allocation of Housing and Homelessness (Eligibility) (Wales) Regulations SI 2014/2603. We set out the classes of persons subject to immigration control who are eligible for an allocation at Appendix Two. Those classes can change if the Regulations are amended and reference should always be made to the up to date text of Regulation 3. The most common classes of persons who are subject to immigration control who are eligible under Regulation 3 are refugees (Class A) and people who are habitually resident and whose leave to enter or remain does not contain any No Recourse to Public Funds condition (Class C).
- 3.3.** The second category of people who are ineligible are people who are not habitually resident in the Common Travel Area (England, Wales, Scotland, Northern Ireland, Republic of Ireland, Isle of Man and the Channel Islands). This will apply to British nationals and also to some EEA nationals and their family members. There are some exemptions to the habitual residence requirement, set out at Regulation 4(2) Allocation of Housing and Homelessness (Eligibility) (Wales) Regulations SI 2014/2603. We reproduce the categories of people who are exempt from the habitual residence requirement at Appendix Three. Those categories can change if the Regulations are amended and reference should always be made to the up to date text of Regulation 4(2).
- 3.4.** UK law also requires that the Council and its Partners cannot allocate housing to a person whose only right to reside in the UK arises under European Union law based on their status as a jobseeker, or an initial three months' right of residence or a derivative right of residence based on being the principal carer for a British citizen.
- 3.5.** The Council is not allowed to allocate housing to an ineligible person by granting them a joint occupation contract with another, eligible person. Where there are two applicants, and one is eligible and the other ineligible, the Council will grant a sole occupation contract to the eligible applicant.
- 3.6.** These rules do not apply to a person who is already a contract holder of the any council or registered social landlord, if the contract was granted as a result of an allocation.

#### **Exclusions**

- 3.7.** The Council has the discretion to treat applicants as ineligible for an allocation of housing on the basis of unacceptable behaviour. The Council will only treat behaviour

as being unacceptable if it meets the definition of 'Prohibited Conduct' as defined in Section 55 Renting Homes Act 2014 (see Appendix One). The Council's use of this sanction will be kept to a minimum. The Council will wherever possible use support mechanisms to maximise opportunities for people to secure social housing.

- 3.8.** In determining whether an applicant is ineligible due to unacceptable behaviour, the Council will apply the following three-part legal test:
- i. Where there is evidence of unacceptable behaviour was it serious enough to have entitled a landlord to obtain a possession order?
  - ii. Was the behaviour serious enough to render the applicant or a household member unsuitable to be a tenant?
  - iii. Is the behaviour unacceptable at the time of application?
- 3.9.** Where all three conditions are met, the Council will consider exercising its discretion to decide if the applicant is to be treated as ineligible for an allocation. In reaching its decision, the Council will consider each application on its own merits. Having regard for each applicant's personal circumstances (and the personal circumstances of the applicant's household), including their health and medical needs, dependants and any other factors relevant to the application. A decision to treat an applicant as ineligible must be underpinned by compliance with the law and the Code of Guidance.
- 3.10.** If an applicant who has, in the past, been deemed by the Council and its Partners to be ineligible, now considers their unacceptable behaviour should no longer be held against them as a result of changed circumstances, they can make a fresh application. Unless there has been a considerable lapse of time it will be for the applicant to show that their circumstances or behaviour has changed. What constitutes a considerable lapse of time will depend upon the individual circumstances of the case and in particular the nature of the unacceptable behaviour.

## **Reduced Priority**

### **Arrears**

**3.12.** Where the Council has reason to believe the applicant has rent arrears/former tenant debt that is equivalent to or more than 8 weeks' rent arrears they will be given reduced priority as reflected in their banding (section 4), and expected to:

- enter into and maintain a repayment plan; and
- make sustained payments for a minimum of 12 consecutive weeks

Once the debt is reduced to below 8 weeks' rent or the repayment plan has been adhered to, at this point, applicants can be reassessed. If the debt still remains, they will need to continue making repayments.

**3.13.** Applicants who have met the requirements of their repayment plan or have lowered their debt to less than 8 weeks will need to contact the Council to request a reassessment.

**3.14.** Where an applicant would otherwise qualify for a Priority banding, or where exceptional circumstances apply, the Council may decide not to give lower priority. This will be considered on a case-by-case basis.

### **Income and Asset Thresholds**

**3.15.** Applicants will be awarded a lower Banding if they meet the following financial criteria:

- Single applicants or couples requiring one-bedroom accommodation with:
  - a gross household income exceeding the average (median) gross weekly earnings for Bridgend, as indicated by the latest available Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE) or
  - savings/assets over £30,000;
- Families or households requiring two or more bedrooms with:
  - a gross household income exceeding double the average (median) gross weekly earnings for Bridgend, as indicated by the latest available Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE) or
  - savings/assets over £30,000;
- Ownership of a residential property or a significant (50% or more) share in a residential property (domestic or international).

**3.16.** Discretion may be applied in limited cases where strict adherence to thresholds would disadvantage applicants due to specific circumstances. These may include but are not limited to:

- Medical and disability grounds;
- People in hospital ready for discharge whose property is not suitable;
- Homeowners who are eligible for sheltered or supported accommodation;
- In exceptional circumstances, where a homeowner or person with a financial interest in a property is unable to occupy that property.

### **False or Misleading Information**

**3.17.** If an applicant, or someone on the applicant's behalf, knowingly provides false information or withholds information that is relevant to their application for housing (which is a criminal offence under the Housing Act 1996 and liable on summary conviction to a fine not exceeding £5000) then the applicant will be given lower priority. The Council will inform the applicant in writing of their Banding and the notification will include the reasons for reduced priority as well as the procedure to review that decision.

## **4.0 Making an application**

- 4.1.** Guidance on how to apply for housing is provided separately on the Council's website, or from the Housing Department directly. This policy sets out the principles that govern application, assessment and allocation.
- 4.2.** An application to join the Housing Register is subject to a housing assessment being completed. The outcome of the housing assessment will take into account the applicant's circumstances, including:
- whether they meet reasonable preference categories (see section 1);
  - the suitability of their current housing, including overcrowding (see glossary of terms);
  - their specific housing needs.

All relevant additional information provided by the applicant or by other agencies

on the applicant's behalf will be considered during the assessment.

- 4.3. Following the assessment, applicants will be notified of the outcome.
- 4.4. The Council may retain details of applicants who are not eligible for housing allocation but qualify for other forms of accommodation (see section 4.6).
- 4.5. Applicants may express interest and be offered other forms of accommodation under this Policy to meet their housing need including:
  - low-cost home ownership;
  - intermediate rented housing;

More information about these housing options can be obtained from the Council and its Partners.

- 4.6. In order to ensure that the Council is treating all applicants fairly, applicants who are Council Members, Council Employees or a member of their family, Partners' Employees or a member of their family should disclose this fact on any application for housing. These applications will be assessed in the normal way but registrations and any allocation of accommodation will require the approval of a Senior Officer of the Council and will be considered in accordance with the Partner Housing Association's rules.
- 4.7. Joint applications will be accepted where all parties are eligible. Where one party is ineligible due to immigration status or unacceptable behaviour, the application will be processed as a sole application only.
- 4.8. Applicants may indicate a preferred area in which they wish to live. However, it is important to note that restricting preferences to a single area significantly reduces the likelihood of being offered accommodation. While preferences will be considered, allocations are dependent on availability and housing need.
- 4.9. Applicants who are homeless, in supported accommodation, or making an application directly from a care placement will, by default, be considered for all available areas within the Borough to maximise their chances of being offered suitable housing. However, they may choose to opt out of specific areas, provided this is in line with the reasonable offer criteria. (Outlined in 4.15, Offer of Accommodation).
- 4.10. The date on which the applicant contacts the Council for a housing assessment is the "effective date" of registration. Allocations will normally be taken in effective date order, from the highest Band, subject to the target arrangements.
- 4.11. Applicants will be required to re-register their housing application in order to confirm that they still want to and are eligible to be considered for housing. On the anniversary of their registration date, applicants will be required to renew their application. Applicants will be notified in writing of the arrangements for completing this renewal. Failure to complete the renewal within the time period specified will result in the applicant being removed from the Housing Register.

### **Rapid Rehousing and Housing Allocation Principles**

- 4.12. This policy operates in alignment with the principles of Rapid Rehousing, which aims to ensure that people experiencing homelessness are supported to move into settled housing as quickly as possible, rather than remaining in temporary accommodation for extended periods.

The key principles of Rapid Rehousing are that:

- everyone is considered 'housing ready' with the right support;
- people spend as little time as possible in temporary accommodation;
- people are able to access the right home in the right place for them;
- multi-agency support is made available and tailored to individual needs

**4.13.** Rapid Rehousing is the default approach for homeless applicants, but allocation decisions will continue to be made within the framework of this Policy.

## **Banding**

Applicants will be placed in one of four Bands depending on their housing need identified through the housing assessment and according to the following criteria:

### **PRIORITY BAND**

Those applicants falling within the reasonable preference categories set out in sections 1.12 and 1.13 where the following also apply:

- a number of statutory agencies are involved; or
- there is a statutory requirement to intervene; or
- immediate provision of housing will alleviate intense agency input; or
- immediate provision of housing is needed because of a critical medical or welfare need including emergencies; or
- a care leaver in an intensive care or supported accommodation placement requires accommodation, which will result in the alleviation of wider intensive agency input; or
- under occupation of social housing and need to transfer to a smaller property in order to avoid loss of tenancy\*

In addition, due to the high demand and limited availability of certain property types, priority will also be given to:

- applicants under-occupying four-bedroom or larger properties who desire smaller accommodation\*; or
- households who require two or three-bedroom properties who are occupying a one-bedroom property\*; or
- applicants occupying an adapted or accessible (e.g. ground floor or with a wet room, wheelchair accessible etc.) property that is no longer required for their needs\*

\*Where the applicant's current property is in Bridgend and let by a Bridgend based Social Housing provider as per section 1.2.

### **BAND A**

Those applicants assessed as having urgent housing need who:

- have an urgent need to move because of your disability and the need for an adapted property; or
- are owed a homeless duty under the Housing (Wales) Act 2014 (unless they are owed a duty solely because the Council has had regard to a restricted

person (within the meaning of Part 2 of the Housing (Wales) Act 2014) including:

- Applicants who suddenly lose their existing home as a result of a disaster e.g. fire or flood
- Victims of domestic or other abuse;
- Victims of hate incidents;
- Witnesses of crime or victims of crime who would be at risk of intimidation amounting to violence or threats of violence if they remained in their current homes; or
- need to move on from supported housing; or
- need to move because of urgent medical or hardship reasons; or
- need to move to suitable adapted accommodation because of a serious injury, medical condition or disability which they, or a member of their household has sustained as a result of service in the Armed Forces; or
- need accommodation as a result of leaving the Armed Forces and the loss of military accommodation; or
- are under occupying social housing and want to transfer to a smaller property in order to avoid financial hardship; or
- are 16-25 and need to move on from a care placement

## **BAND B**

Those applicants assessed as having non urgent housing need who:

- need to move for medical or hardship reasons; or
- need to move because of overcrowding conditions or insanitary conditions; or
- need to move because they are disabled and their property is not suitable and cannot be easily adapted; or
- are homeless but do not qualify for Band A (for example, those who are homeless but not owed a duty by the council); or
- people who need to move to a particular locality for reasons of employment, meeting the needs in the local area, where failure to meet that need would cause hardship (to themselves or to others); or
- meet the criteria set out in these Bandings but they have no local connection with the area (individuals applying immediately upon leaving the Armed Forces or care experienced children / care leavers aged 16-25 for whom Bridgend is their corporate parent will not have to meet a local connection criteria).

## **Band C**

Those applicants who meet the criteria in the above bands, but:

- Are a single applicant or couple requiring one-bedroom accommodation with a gross household income exceeding the average (median) gross weekly earnings for Bridgend, as indicated by the latest available Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE) or savings/assets over £30,000; or

- Families or households requiring two or more bedrooms with a gross household income exceeding double the average (median) gross weekly earnings for Bridgend, as indicated by the latest available Office for National Statistics (ONS) Annual Survey of Hours and Earnings (ASHE) or savings/assets over £30,000; or
- Have ownership of a residential property or a significant (50% or more) share in a residential property (domestic or international); or
- Those applicants who are owed a duty under the Housing (Wales) Act 2014 solely because the Council has had regard to a restricted person (within the meaning of Part 2 of the Housing (Wales) Act 2014); or
- Have refused an offer of suitable accommodation made by the Council; or
- Have made a false or misleading statement within their application; or
- Where the Council has reason to believe the applicant has rent arrears/former tenant debt that is equivalent to or more than 8 weeks' rent arrears; or
- Following assessment, are established to *not* meet the criteria in the above bands.

**4.14.** An applicant will normally remain in the allotted Band until an offer of housing is made, except in the following circumstances:

- 4.14.1. A material change in circumstances requires re-banding. If promoted to a higher Band, the effective date will reset to the date the change was reported. If demoted, the original effective date will be retained.
- 4.14.2. Applicants who deliberately worsen their situation to gain advantage will be assessed on the basis of their situation immediately prior to this taking place.

### **Offer of Accommodation**

**4.15.** Applicants will usually receive one reasonable offer of accommodation, based on the information gathered as part of the housing assessment. The offer will be considered reasonable if it:

- matches the household's required property size and type;
- meets verified needs for adaptations and/or accessibility;
- the location provides access to necessary support needs when required;
- the location provides reasonable access to schools and/or employment when required;
- the location offers reasonable access to public transport when required.

Applicants who have refused an offer of suitable accommodation or who have made a false/misleading statement in order to gain an allocation of accommodation will remain in Band C for a period of 12 months. It is for the applicant to contact the Council after this time for a reassessment.

### **Bedroom Eligibility**

**4.16.** For applicants who are eligible to join the Housing Register the applicant's requirements in relation to property size will normally be determined according to the

standard indicated in the household table below. A definition of who is considered to be a “household” can be seen within the glossary.

**4.17.** Exceptions may occur (subject to the applicant demonstrating ability to afford rent) which will include, but not exclusively:

- When the housing provider needs to consider the sustainability of an area;
- Where there is limited stock or low demand;
- Where a household member has a disability or health related condition which requires an additional bedroom. This must be supported by information from a relevant medical professional and will be subject to an affordability assessment.
- Where the applicant has shared responsibility for a child/children who is/are not a permanent household member, an additional bedroom will be permitted subject to a financial assessment.

Household	Bedrooms
<b>Single person</b>	<b>1 or bedsit</b>
<b>Couple</b>	<b>1</b>
<b>Single pregnant woman (and in receipt of the MATB1 certificate)</b>	<b>2</b>
<b>Single parent or couple with one child</b>	<b>2</b>
<b>Single parent or couple with two children of same sex</b>	<b>2</b>
<b>Single parent or couple with two children of opposite sex under 10 years</b>	<b>2 or 3</b>
<b>Single parent or couple with two children of opposite sex where at least one child is over 10 years</b>	<b>3</b>
<b>Single parent or couple with three children</b>	<b>3</b>
<b>Single parent or couple with four children</b>	<b>3 or 4</b>
<b>Single parent or couple with five children</b>	<b>4</b>
<b>Single parent or couple with more than five children</b>	<b>4</b>

**4.18.** The following should be read in conjunction with the table above:

For the purposes of sharing bedrooms, the following apply:

- Under 10 years old, mixed sexes may share a bedroom. However, where a child is within twelve months of being 10 years old, an additional bedroom may be provided;
- Under 16 years old, same sexes may share a bedroom. However, where a child is within twelve months of being 16 years old, an additional bedroom may be provided;
- Over 16 years old, own bedroom required.

Parlour type properties can be considered as having an additional bedroom to assist where necessary with housing larger families where larger accommodation is not available.

In all cases child refers to dependent child (see glossary of terms).

**4.19.** Individual assessments will be required for applicants whose household comprises more than two adults or for other households who do not fit within the standards in the table.

## Accessible and Sheltered Housing

- 4.20.** Properties particularly suitable for people with a medical need or following an Occupational Therapist Assessment will normally be allocated to people where the adaptations will meet their needs or where the property can be easily adapted to meet their needs, e.g. adapted properties, bungalows and ground floor flats. Applicants in need of adapted or accessible properties will be able to outline their requirements at the point of application. This is to support the allocation of accommodation that appropriately meets their requirements (e.g. adapted for wheelchair use, level access wet room, ground floor, hoists, stairlifts etc.) All specified requirements must be supported by appropriate evidence demonstrating the need.
- 4.21.** Sheltered housing will normally be offered to people over 55 or people over 50 who have a medical need for sheltered housing. Applicants for sheltered housing who are assessed as being in housing need will be placed in either the Priority, A or B bands.

## 5.0 Local lettings policies

- 5.1.** Section 167(2E) of the Housing Act 1996 enables the Council to allocate accommodation to people of a particular description, whether or not they fall within the reasonable preference categories (outlined in section 1.13).

Such local flexibility is permitted, provided that:

- Reasonable preference groups do not become marginalised or dominated by other allocations; and
- The scheme continues overall to give preference to those in the greatest housing need in line with statutory duties.

This legal basis underpins the use of Local Lettings Policies (LLPs), which allow for tailored allocation approaches to address specific community housing management objectives,

- 5.2.** Local Lettings Policies can be used to address a number of issues such as:

- Supporting people with a local connection who need support
- Support the Armed Forces Covenant
- Creating more mixed communities;
- Managing a concentration of deprivation;
- Ensuring properties that are particularly suited to being made accessible are prioritised for those with access needs;
- Relocating essential workers such as teachers, nurses and police officers within a reasonable travelling distance from their work;
- Dealing sensitively with lettings in rural areas to sustain communities by giving priority to those with a local connection to the local area;
- Under occupancy as a result of the Welfare Reform Act 2012;
- Supporting people in work, training or volunteering or who are seeking work or to take up volunteering opportunities;
- Sustaining Welsh-speaking communities by giving priority to those in housing need

- with a local connection to the area;
- Taking account of the needs of mobile workers such as those in the armed forces.

**5.3.** The Council may introduce Local Lettings Policies for housing management reasons. These may include:

- Supporting regeneration or redevelopment schemes
- Managing lettings for specific property types
- Encouraging community sustainability, integration and cohesion.

Lettings will be monitored to ensure that they comply with the Local Lettings Policy. Please refer to the Council's website for details of current Local Lettings Policies.

**5.4.** Local Lettings Policies will be monitored as to their effectiveness and reviewed regularly so that they can be revised or revoked where they are no longer appropriate or necessary.

## **6.0 Change of Circumstances**

**6.1.** Applicants should notify the Council in writing of any change in their circumstances, as this may affect their housing eligibility or banding. Changes that must be reported include, but are not limited to:

- i. A change of address, for themselves or any other person on their application; or
- ii. Any additions to the family or any other person they would wish to join the application (N.B. it is for the Council to decide whether they will allow a person/s to join the application); or
- iii. Any member of the family or any other person on the application who has left the accommodation; or
- iv. Any change in income or savings

**6.2.** A change of circumstances may require a further housing assessment.

## **7.0 Transfer arrangements**

**7.1.** The social landlords who are participating in this Policy may operate internal transfer schemes. Tenants who wish to transfer within their existing landlord's stock should contact their landlord directly for details of transfer eligibility and procedures.

**7.2.** Tenants who wish to move from one housing association to another social landlord in Bridgend or elsewhere may use the national HomeSwapper scheme. Online information about HomeSwapper can be found at <https://www.homeswapper.co.uk/>, or by contacting Bridgend County Borough Council or the social landlords in Bridgend.

## **8.0 Complaints**

**8.1.** Any applicant who is unhappy with the service with which they have been provided by

the Council may complain. It is best for everyone if complaints are dealt with as quickly as possible. Applicants should contact the officer or individual they usually deal with first who will try to solve the problem quickly.

- 8.2.** If a complaint is not resolved at an informal level the applicant may make a formal complaint. Detail in relation to complaints, including how to complain, is available on the Council's website (<https://www.bridgend.gov.uk/council/customer-services/concerns-and-formal-complaints/>) or from the Council's Offices.

## **9.0 Right to review**

- 9.1.** Any applicant has the right to request a review of any of the following decisions:

- i. That they are not eligible under the Allocation Policy. This includes decisions where an applicant is deemed ineligible due to unacceptable behaviour; or
- ii. To remove an application from the Housing Register following unreasonable refusals of offers of accommodation; or
- iii. About the facts of an applicant's case which have been, or are likely to be, taken into account in considering whether to make an allocation to them; or
- iv. The assessment of an application, including the Banding; or
- v. The cancellation or withdrawal of an application.

- 9.2.** Any applicant wishing to request a review of a decision must do so by contacting the Council in writing within 21 days of the date of the letter that informed them of that decision.

- 9.3.** Homeless applicants may also have a statutory right of review on certain homelessness decisions, including decisions on the suitability of accommodation offered and any discharge of duty.

- 9.4.** A Review Officer who was not involved in the original decision will deal with the review within 14 days of the request. All decisions following reviews will be notified to the applicant in writing giving the reasons for the decision. The decision letter will be sent out within 21 days of the original request. The review decision cannot be appealed at the County Court and the only available legal challenge against the review decision is by means of judicial review.

## **10. Glossary of Terms**

<b>Code of Guidance</b>	The document issued by Welsh Government, and periodically updated which provides direction and further explanation on the way in which Housing Legislation should be implemented
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<b>Dependent child</b>	A child (person under 18) who depends on a parent or guardian for financial, emotional or other support and where there is no alternative (one parent or guardian will usually be regarded as providing the principal home)
<b>Existing social housing tenants</b>	Existing tenants of one of the seven Partner Housing Associations
<b>Hardship</b>	Difficulty which is beyond mere inconvenience causing the applicant suffering or deprivation which is likely to be endured over a long period
<b>Household</b>	This policy regards a “household” as parents, children (aged under 18), any adult children living with their parents, and potentially other relatives who are dependent on the main applicant and are either residing with the applicant or might reasonably be expected to reside with the applicant.
<b>Housing Association</b>	Independent organisations that provide low-cost social housing on a not-for-profit housing basis for those in need of housing
<b>Overcrowding</b>	A housing situation is considered to be overcrowded if it fits one of the following situations: <ul style="list-style-type: none"> <li>i. Two adults of opposite sex not living together as partners, who have to share a bedroom;</li> <li>ii. Three or more people of any age are sharing a bedroom where one or more is over 10 years of age;</li> <li>iii. Anyone sleeping in a room that is not a bedroom or a room that could reasonably be used as a bedroom;</li> <li>iv. For medical reasons a separate bedroom is necessary;</li> </ul>

	v. For reasons of ethnicity, culture or religious belief it is not possible to share a bedroom.
<b>Restricted Person</b>	A “restricted person” means a person— (a)who is not eligible for help as set out at 3.1-3.6, and (b)who is subject to immigration control within the meaning of the Asylum and Immigration Act 1996, and (c)who either— (i)does not have leave to enter or remain in the United Kingdom, or (ii)has leave to enter or remain in the United Kingdom subject to a condition to maintain and accommodate himself or herself, and any dependants, without recourse to public funds.
<b>Sheltered housing</b>	Rented housing for older and/or disabled or other vulnerable people

<b>Social housing</b>	Social housing is housing that is let at low rents and on a secure basis to people in housing need. It is generally provided by Councils and not-for-profit organisations such as Housing Associations
<b>Unacceptable behaviour</b>	When the Council refer to “behaviour” it means anti-social behaviour and other prohibited conduct which comes within section 55 of the Renting Homes (Wales) Act 2016 and the Council is satisfied that an outright possession order would have been made under that section (see Appendix One).

## **Appendix One – Section 55 of the Renting Homes (Wales) Act 2016**

### **Section 55 Anti-social behaviour and other prohibited conduct**

1. The contract-holder under an occupation contract must not engage or threaten to engage in conduct capable of causing nuisance or annoyance to a person with a right
  - a. to live in the dwelling subject to the occupation contract, or
  - b. to live in a dwelling or other accommodation in the locality of the dwelling subject to the occupation contract.
2. . The contract-holder must not engage or threaten to engage in conduct capable of causing nuisance or annoyance to a person engaged in lawful activity—
  - a. in the dwelling subject to the occupation contract, or
  - b. in the locality of that dwelling.
3. The contract-holder must not engage or threaten to engage in conduct—
  - a. capable of causing nuisance or annoyance to—
    - i. the landlord under the occupation contract, or
    - ii. a person (whether or not employed by the landlord) acting in connection with the exercise of the landlord's housing management functions, and
  - b. that is directly or indirectly related to or affects the landlord's housing management functions.
4. The contract-holder may not use or threaten to use the dwelling subject to the occupation contract, including any common parts and any other part of a building comprising the dwelling, for criminal purposes.
5. The contract-holder must not, by any act or omission—
  - a. allow, incite, or encourage any person who is living in or visiting the dwelling to act as mentioned in subsections (1) to (3), or
  - b. allow, incite, or encourage any person to act as mentioned in subsection (4).

## **Appendix Two – Eligibility / Non Eligibility Criterion**

Persons subject to immigration control who are eligible for an allocation of housing accommodation: Regulation 3, Allocation of Housing and Homelessness (Eligibility) (Wales) Regulations SI 2014/2603. These classes of people change and reference should always be made to the updated text of Regulation 3.

The following classes of persons subject to immigration control are persons who are eligible for an allocation of housing accommodation under Part 6 of the 1996 Act—

Class A – a person who is recorded by the Secretary of State as a refugee within the definition in Article 1 of the Refugee Convention and who has leave to enter or remain in the United Kingdom;

Class B – a person—

- (i) who has exceptional leave to enter or remain in the United Kingdom granted outside the provisions of the Immigration Rules; and
- (ii) whose leave to enter or remain is not subject to a condition requiring that person to maintain and accommodate themselves, and any person who is dependant on that person, without recourse to public funds;

Class C – a person who is habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland and whose leave to enter or remain in the United Kingdom is not subject to any limitation or condition, other than a person—

- (i) who has been given leave to enter or remain in the United Kingdom upon an undertaking given by the person's sponsor;
- (ii) who has been resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland for less than five years beginning on the date of entry or on the date on which the undertaking was given in respect of the person, whichever date is the later; and
- (iii) whose sponsor or, where there is more than one sponsor, at least one of whose sponsors is still alive;

Class D – a person who has humanitarian protection granted under the Immigration Rules;

Class E – a person who is habitually resident in the United Kingdom, the Channel

Islands, the Isle of Man or the Republic of Ireland and who has limited leave to enter the United Kingdom as a relevant Afghan citizen under paragraph 276BA1 of the Immigration Rules;

Class F — a person who has limited leave to enter or remain in the United Kingdom on family or private life grounds under Article 8 of the Human Rights Convention, such leave granted under paragraph 276BE(1), paragraph 276DG or Appendix FM of the Immigration Rules, and who is not subject to a condition requiring that person to maintain and accommodate themselves, and any person who is dependent on that person, without recourse to public funds;

Class G – a person who is habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland and who has been relocated to the United Kingdom under section 67 of the Immigration Act 2016 and has limited leave to remain under paragraph 352ZH of the Immigration Rules;

Class H – a person who is habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland and who has been granted Calais leave to remain in the United Kingdom under paragraph 352J of the Immigration Rules;

Class I — a person who is habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland and who has limited leave to remain in the United Kingdom as a stateless person under paragraph 405 of the Immigration Rules ;

Class J — a person—

- (i) who has limited leave to enter or remain in the United Kingdom by virtue of Appendix Hong Kong British National (Overseas) of the Immigration Rules ;
- (ii) whose leave to enter or remain is not subject to a condition requiring that person to maintain and accommodate themselves, and any person who is dependent on that person, without recourse to public funds; and
- (iii) who is habitually resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland;

Class K — a person—

- (i) who is granted leave to enter or remain in the United Kingdom in accordance with the Immigration Rules , where such leave is granted by virtue of—
  - (aa) the Afghan Relocations and Assistance Policy; or
  - (bb) the previous scheme for locally-employed staff in Afghanistan (sometimes referred to as the ex-gratia scheme); or
- (ii) with leave to enter or remain in the United Kingdom not coming within subparagraph (i), who left Afghanistan in connection with the collapse of the Afghan government that took place on 15 August 2021, but excluding a person (P)—
  - (aa) who is subject to a condition requiring P to maintain and accommodate themselves, and any person who is dependent on P, without recourse to public funds; or
  - (bb) who has been given leave to enter or remain in the United Kingdom upon an undertaking given by P's sponsor and has been resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland for less than five years beginning on the date of entry or the date on which P's sponsor gave the undertaking in respect of P, whichever date is the later, and whose sponsor or, where there is more than one sponsor, at least one of whose sponsors, is still alive;

Class L — a person who has been granted leave to enter or remain in the United Kingdom by virtue of Appendix Ukraine Scheme of the Immigration Rules;

Class M — a person who has temporary leave to remain in the United Kingdom granted in accordance with Appendix Temporary Permission to Stay for Victims of Human Trafficking or Slavery of the Immigration Rules;

Class N — a person who—

- (i) was residing in Sudan before 15 April 2023;
- (ii) left Sudan in connection with the violence which rapidly escalated on 15 April 2023 in Khartoum and across Sudan;
- (iii) has leave to enter or remain in the United Kingdom given in accordance with the Immigration Rules;
- (iv) is not a person whose leave is subject to a condition requiring that

person to maintain and accommodate themselves, and any person who is dependent on that person, without recourse to public funds; and

(v) is not a person (P)—

(aa) who has been given leave upon an undertaking given by P's sponsor;

(bb) who has been resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland for less than five years beginning on the date of entry or the date on which P's sponsor gave the undertaking in respect of P, whichever date is the later; and

(cc) whose sponsor or, where there is more than one sponsor, at least one of whose sponsors, is still alive;

Class O — a person who—

(i) was residing in Israel, the West Bank, the Gaza Strip, East Jerusalem, the Golan Heights or Lebanon immediately before 7 October 2023;

(ii) left Israel, the West Bank, the Gaza Strip, East Jerusalem, the Golan Heights or Lebanon in connection with the Hamas terrorist attack in Israel on 7 October 2023 or the violence which rapidly escalated in the region following the attack;

(iii) has leave to enter or remain in the United Kingdom given in accordance with the Immigration Rules;

(iv) is not a person whose leave is subject to a condition requiring that person to maintain and accommodate themselves, and any person who is dependent on that person, without recourse to public funds; and

(v) is not a person (P)—

(aa) who has been given leave upon an undertaking given by P's sponsor;

(bb) who has been resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland for less than five years beginning on the date of entry or the date on which P's sponsor gave the undertaking in respect of P, whichever date is the later; and

(cc) whose sponsor or, where there is more than one sponsor, at least one of whose sponsors, is still alive;

Class P – a person (P) who has indefinite leave to enter the United Kingdom by virtue

of Appendix Victim of Domestic Abuse of the Immigration Rules in circumstances where P is a victim of transnational marriage abandonment;

Class Q – a person who has limited leave to enter or limited leave to remain in the United Kingdom and who, after making a change of conditions application, has had their no recourse to public funds condition lifted by the Home Office in accordance with section 3(1)(c)(ii) of the Immigration Act 1971 and is not a person within Class F or Class J; and

Class R — a person who—

- (i) was residing in Israel, the West Bank, the Gaza Strip or East Jerusalem on or before 23 June 2025;
- (ii) left Israel, the West Bank, the Gaza Strip or East Jerusalem in connection with the conflict between Israel and Iran which escalated in June 2025;
- (iii) has leave to enter or remain in the United Kingdom given in accordance with the Immigration Rules;
- (iv) is not a person whose leave is subject to a condition requiring that person to maintain and accommodate themselves, and any person who is dependent on that person, without recourse to public funds;
- (v) is not a person (P)—
  - (aa) who has been given leave upon an undertaking given by P's sponsor;
  - (bb) who has been resident in the United Kingdom, the Channel Islands, the Isle of Man or the Republic of Ireland for less than five years beginning on the date of entry or the date on which P's sponsor gave the undertaking in respect of P, whichever date is the later; and
  - (cc) whose sponsor or, where there is more than one sponsor, at least one of whose sponsors, is still alive; and
- (vi) within 6 months beginning with the date on which His Majesty's Government first published advice to British nationals to leave Israel, the West Bank, the Gaza Strip or East Jerusalem, or from the date of the first evacuation from Israel, the West Bank, the Gaza Strip or East Jerusalem, whichever is later, made an application for an allocation of housing accommodation under Part 6 of the 1996 Act.

### **Appendix Three – Habitual Residence Requirement exemptions**

The following categories of people are exempt from the habitual residence requirement under Regulation 4(2), Allocation of Housing and Homelessness (Eligibility) (Wales) Regulations SI 2014/2603. These classes of people change and reference should always made to the updated text of Regulation 4(2).

- A. a worker;
- B. a self-employed person;
- C. a person who is the family member of a person specified in sub-paragraphs (a) or (b);
- D. a person with a right to reside permanently in the United Kingdom by virtue of regulation 15(1)(c), (d) or (e) of the Immigration (European Economic Area) Regulations 2016/1052;
- E. a person who is in the United Kingdom as a result of the person's deportation, expulsion or other removal by compulsion of law from another country to the United Kingdom;
- F. a frontier worker;
- G. a person who—
  - (i) is a family member of a frontier worker; and
  - (ii) has a right to reside by virtue of having been granted limited leave to enter or remain in the United Kingdom under the Immigration Act 1971 by virtue of Appendix EU to the immigration rules made under section 3 of that Act;
- H. a person who left Afghanistan in connection with the collapse of the Afghan government that took place on 15 August 2021;
- I. a person who was residing in Ukraine immediately before 1 January 2022 and who left Ukraine in connection with the Russian invasion which took place on 24 February 2022;
- J. a person who was residing in Sudan before 15 April 2023 and left Sudan in connection with the violence which rapidly escalated on 15 April 2023 in Khartoum and across Sudan;
- K. a person who was residing in Israel, the West Bank, the Gaza Strip, East Jerusalem,

the Golan Heights or Lebanon immediately before 7 October 2023 and who left Israel, the West Bank, the Gaza Strip, East Jerusalem, the Golan Heights or Lebanon in connection with the Hamas terrorist attack in Israel on 7 October 2023 or the violence which rapidly escalated in the region following the attack; and

L. a person who—

(i) was residing in Israel, the West Bank, the Gaza Strip or East Jerusalem on or before 23 June 2025;

(ii) left Israel, the West Bank, the Gaza Strip or East Jerusalem in connection with the conflict between Israel and Iran which escalated in June 2025; and

(iii) within 6 months beginning with the date on which His Majesty's Government first published advice to British nationals to leave Israel, the West Bank, the Gaza Strip or East Jerusalem, or the date of the first evacuation from Israel, the West Bank, the Gaza Strip or East Jerusalem, whichever is later, made an application for an allocation of housing accommodation under Part 6 of the 1996 Act.

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>HOMELESSNESS TEMPORARY ACCOMMODATION</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CORPORATE DIRECTOR – FINANCE AND TRANSFORMATION</b>  <b>CABINET MEMBER FOR REGENERATION, ECONOMIC DEVELOPMENT AND HOUSING</b>
<b>Responsible Officer:</b>	<b>RYAN JONES</b> <b>STRATEGIC HOUSING COMMISSIONING MANAGER</b>
<b>Policy Framework and Procedure Rules:</b>	<b>This report is requesting a suspension of the Council’s Contract Procedure Rules (CPRs) but no amendment to the CPRs is being sought.</b>
<b>Executive Summary:</b>	<p><b>A Housing Support Programme Strategy approved by Cabinet in December 2023 sets out the challenges the Council faces in terms of housing and homelessness services. A key challenge is the demand and associated cost of temporary accommodation.</b></p> <p><b>The report provides an update on temporary accommodation and seeks approval to suspend the Council’s CPRs and enter into further agreements with private accommodation providers, in order to enable continuation of short-term arrangements, to meet statutory duties in relation to temporary accommodation.</b></p>

## 1. Purpose of Report

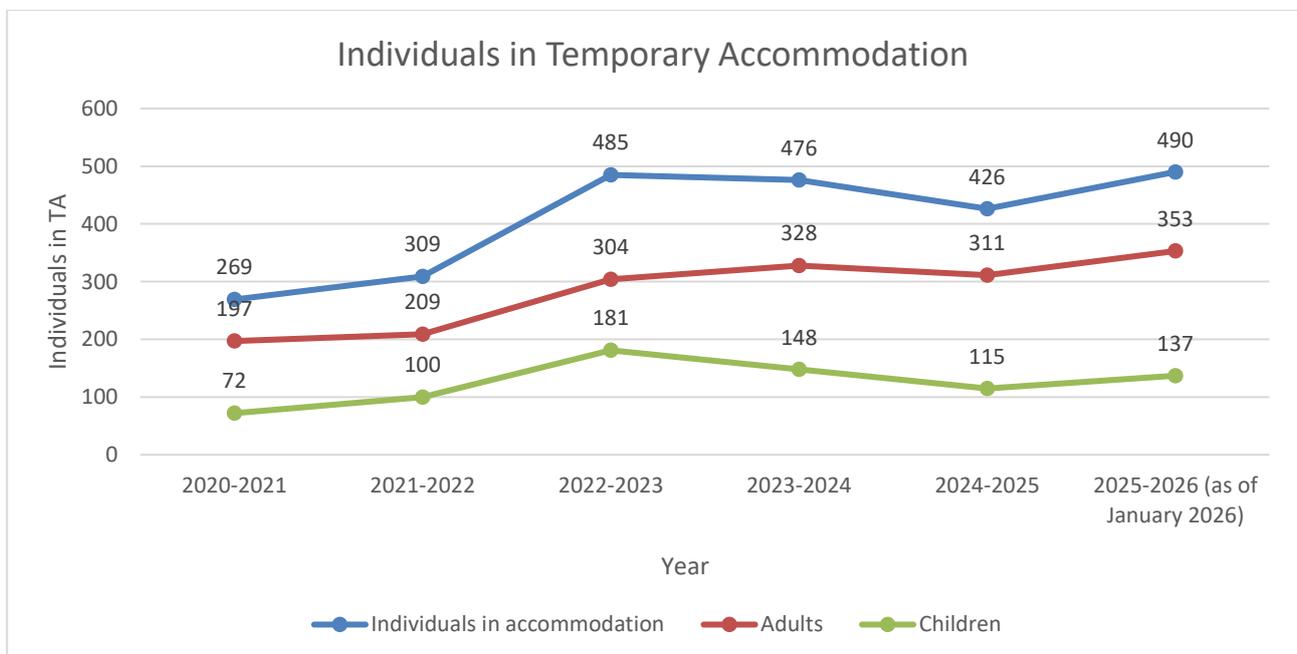
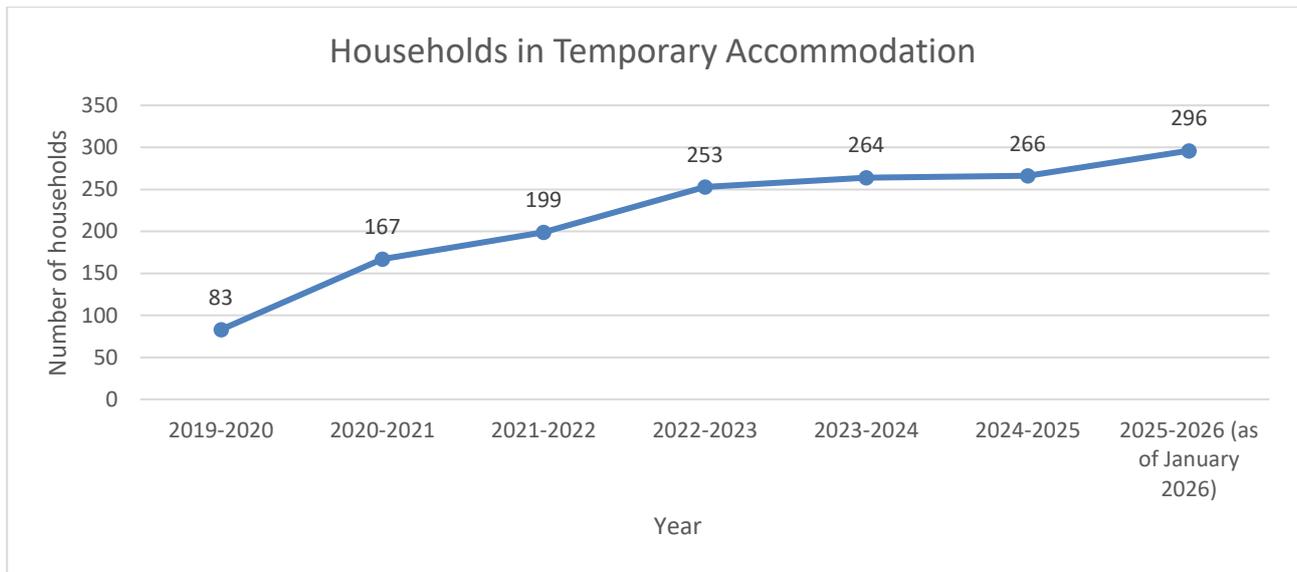
1.1 The purpose of the report is to:

- Seek approval from Cabinet to suspend the relevant parts of the Council’s Contract Procedure Rules (CPRs) with regards to the requirement to tender for a contract and delegate authority to the Group Manager Housing & Community Regeneration to enter into Service Level Agreements with accommodation providers for a period of ‘up to’ 12 months or ‘up to’ 3 years where there is a commercial benefit to do so, in order to continue the provision of additional temporary accommodation as necessary to meet the Council’s statutory duties.

## 2. Background

2.1 In December 2023 Cabinet approved a final Housing Support Programme Strategy (Homelessness Strategy) and Action Plan for 2022-2026.

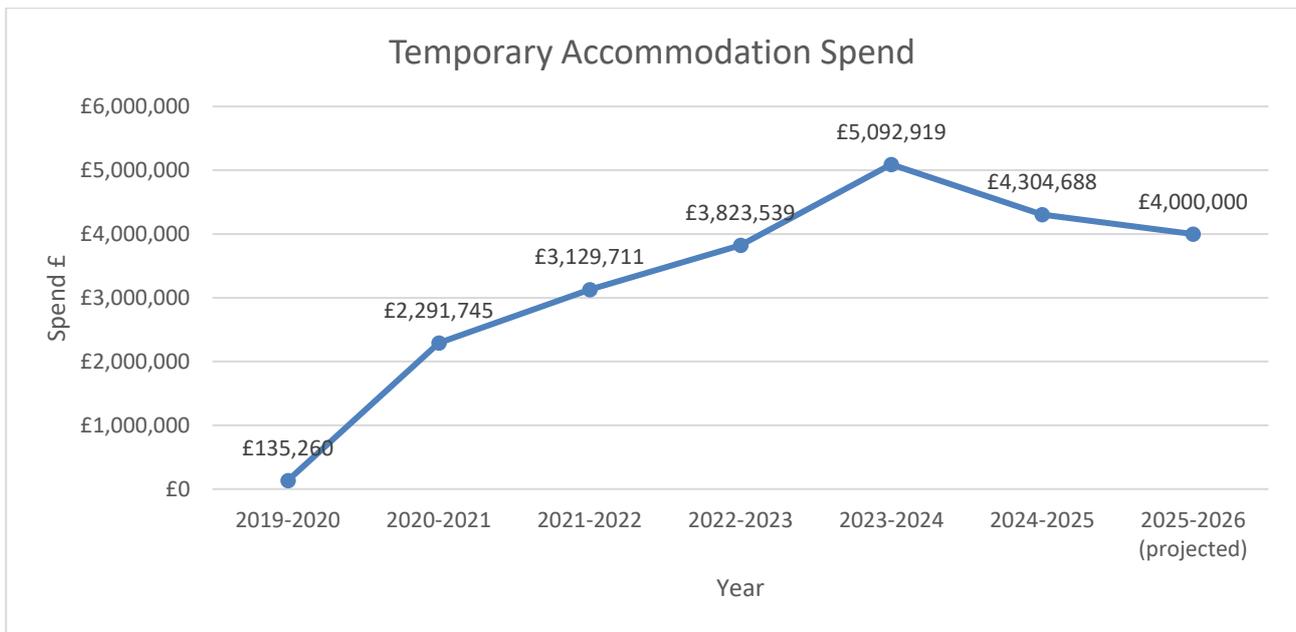
2.2 The Housing Support Programme Strategy outlines the challenges the Council faces in terms of increasing pressure on homelessness services. Several reports to Cabinet since this time have highlighted continued pressure on housing services, particularly in relation to temporary accommodation. The graphs below highlight these continued demands.



2.3 The graphs at 2.2 above show consistent increases in the number of individuals in temporary accommodation. Despite this the number of children in temporary accommodation has significantly reduced from a peak in 2022-23. This reflects an ever-increasing demand from households without children, mainly single-person

households. At the end of January 2026 this cohort made up 75% of all households in temporary accommodation.

- 2.4 The increase in pressure on temporary accommodation is impacted by an 'All In' approach to homelessness, initially directed by Welsh Government at the start of the Covid-19 pandemic and extended by Welsh Government via an extension to the definition of vulnerable with regards to the 'priority need' criteria set out in the Housing (Wales) Act 2014. In 2022 a new 'priority need' category was added, which amended the legislation to continue the principle of an 'All In' approach. These legislative changes largely widen the eligibility of temporary accommodation to more single person households.
- 2.5 The demand for homelessness and temporary accommodation services has been compounded by a wider increase in demand for social housing. The total number of applicants on the Bridgend Common Housing Register at the end of each year has increased substantially. In 2019/2020 there were 816 households on the Common Housing Register. At the end of January 2026, there were around 3,500 households on the Common Housing Register. A combination of the impact of the cost-of-living crisis and a challenging private rented sector are key drivers behind this demand.
- 2.6 The challenges highlighted at section 2.4 above are also key challenges in terms of moving households on from temporary accommodation, meaning households are spending longer in temporary accommodation.
- 2.7 To meet the demands on temporary accommodation highlighted above and ensure compliance with statutory duties to provide temporary accommodation the Council has entered into a range of agreements with private accommodation providers, including those more traditionally used in the tourism sector, such as guest houses and holiday lets. Accessible accommodation for those with disabilities and larger accommodation for families are examples of some of the more costly units secured. Such arrangements were approved by Cabinet in March 2024 and March 2025. Agreements made throughout 2025-26 are due to expire at the end of March 2026.
- 2.8 The cost implications of the pressures on temporary accommodation are stark. The below graph illustrates this.



2.9 Whilst during the Covid-19 pandemic grant income was received from Welsh Government to support with these costs, this is no longer received. Rental income and Service Charge income for those accommodated is received but is limited and does not cover costs.

### 3. Current situation / proposal

3.1 Detailed in reports to Cabinet in March 2024 and September 2024 are a range of measures the Council is taking forward to improve suitability and reduce the cost of temporary accommodation. These measures include Council purchases of temporary accommodation, increased supported accommodation options and a capital development programme to increase affordable housing options.

3.2 In relation to costs the graph at paragraph 2.8 indicates that the measures detailed to Cabinet previously and referenced at paragraph 3.1 are making a positive impact. Whilst demand has continued to rise, costs are projected to decrease by 21% (£1,092,919) between 2023-24 and 2025-26.

3.3 Whilst there are positives in relation to the pieces of work being taken forward to tackle pressures on housing and homelessness the outcomes and upscaling of some of these pieces of work remain medium to long term. As such there is a need to continue to address the immediate pressures highlighted in section 2 of the report. As per paragraph 2.7 the Council's current arrangements with private accommodation providers are due to expire at the end of March 2026.

3.4 The provision of temporary accommodation is a statutory duty in line with the Housing (Wales) Act 2014. To allow the continuation of the arrangements with existing accommodation providers, it is proposed that the relevant parts of the Council's CPRs with regards to the requirement to competitively procure service provision be suspended and the Council enter into Service Level Agreements with accommodation providers for 'up to' 12 months, in order to meet presenting need. It is also proposed that agreements 'of up to' 3 years be entered into where there is a commercial incentive to do so e.g. a longer-term agreement allowing for the provision

of specific in demand accommodation at a reduced rate, than otherwise available via shorter term arrangements.

- 3.5 It is proposed that the agreements with accommodation providers be used, to enable consistency in provision for both Bridgend County Borough Council (BCBC) and any service users accommodated. By providing this accommodation since the Covid-19 pandemic the accommodation providers have developed experience in providing temporary accommodation and a working relationship with BCBC's Housing Solutions Team, key to the successful management of temporary accommodation placements.
- 3.6 Cabinet needs to be aware that in taking forward this action, the Council is exposed to the risk of potential challenge from other accommodation providers. The Council's CPRs ensure that procurement exercises are lawful and carried out in compliance with public procurement law, in particular the Procurement Act 2023. This report proposes entering into agreements without any competition which, where contract values exceed the applicable threshold, breaches the requirements of the Procurement Act 2023 and therefore requires Cabinet's approval to suspend the Council's CPRs.
- 3.7 The risk of challenge is not possible to quantify, however given the need to continue service provision to vulnerable people, the pressures on current homelessness services, and the limited availability of suitable and willing accommodation providers to provide such accommodation, Cabinet may take the view that the potential for challenge is one it is prepared to accept. In addition, due to the specialist nature of provision there are relatively limited numbers of providers of such services. It should also be noted that undertaking a full procurement exercise could risk losing current accommodation providers, as businesses could choose to return to tourism style use for their properties, rather than compete for temporary accommodation use via a tender process.
- 3.8 As has been the case in recent years it is proposed that a further report be brought to Cabinet within 12 months to update on the developing position, with regards to temporary accommodation.

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

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

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

- 5.1 Tackling homelessness is a Welsh Government priority. The report contributes to the goals within the Well-being of Future Generations (Wales) Act 2015 through the 5 ways of working under the Act:
- Long Term – this report references action the Council is taking to provide suitable and cost-effective temporary accommodation. Whilst this is a longer-term goal this

report references a need for short term measures to ensure immediate pressures and statutory duties are met.

- Prevention – the delivery of temporary accommodation prevents households from rough sleeping and experiencing the harshest forms of homelessness. From this position households can work with the Council and other services to secure long term settled accommodation preventing the need for further statutory provision.
- Integration – the provision of temporary accommodation to prevent rough sleeping is conducive to community integration. Suitable provision enables individuals to contribute to economic, social, environmental & cultural outcomes both individually and as part of wider communities.
- Collaboration – our Housing Support Programme Strategy and delivery on an associated Action Plan requires close collaboration with a range of stakeholders, including statutory partners, Registered Social Landlords and commissioned support providers. This report highlights a need for collaboration with a range of private accommodation providers to ensure the delivery of suitable temporary accommodation to prevent homelessness and meet statutory duties.
- Involvement – the Council works with both statutory and non-statutory partners to deliver a range of housing and homelessness services, including temporary accommodation. Individuals with lived experience are routinely involved in the development of service provision, through feedback and opportunities to influence strategic planning.

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

## **6. Climate Change and Nature Implications**

6.1 The prevention and relief of homelessness supports the agenda around climate change. A key priority is to increase BCBC's affordable housing supply to meet demand, with the intention of informing affordable housing schemes to meet these needs. Any schemes developed through the capital programme will be developed in line with Welsh Government planning and standards requirements, which support moves to tackle climate change. It is not envisaged that there will be an impact in relation to nature implications.

## **7. Safeguarding and Corporate Parent Implications**

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

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

## **8. Financial Implications**

- 8.1 The cost of the units of accommodation with private providers utilised on a service level agreement basis for temporary accommodation ranges from £40 per night to £150 per night. The cost of each unit is dependent on the nature of the property, for example a 4 bed property will likely cost more than a 2 bed property. It is estimated that the total cost for a 6 month period will be around £1.65m. This is an estimate at this time as final costs will be negotiated during discussions with accommodation providers, but the service will seek to keep all costs to a minimum. Cabinet should note ad hoc arrangements may still be required in addition, to meet emergency scenarios, which cannot be predicted.

## **9. Recommendations**

- 9.1 It is recommended that Cabinet:

- Note the contents of this report;
- Agrees to suspend the relevant parts of the Council's Contract Procedure Rules (CPRs) with regards to the requirement to tender for a contract and delegate authority to the Group Manager Housing & Community Regeneration to enter into Service Level Agreements with existing accommodation providers for a period of 'up to' 12 months or 'up to' 3 years where there is a commercial benefit to do so in order to continue the provision of additional temporary accommodation as necessary to meet the Council's statutory duties;
- Delegate authority to the Group Manager Housing & Community Regeneration to approve the final terms of the Service Level Agreements on behalf of the Council and to arrange execution of the agreements on behalf of the Council in consultation with the Chief Officer – Legal & Regulatory Services & HR & Electoral;
- Note that a further report will be presented to Cabinet to update on the position regarding temporary accommodation.

### **Background documents**

None

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<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>NON-DOMESTIC RATES: DISCRETIONARY RELIEF: FOOD AND DRINK HOSPITALITY RATES RELIEF SCHEME 2026-27</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member:</b>	<b>CORPORATE DIRECTOR - FINANCE AND TRANSFORMATION  CABINET MEMBER FOR FINANCE AND PERFORMANCE</b>
<b>Responsible Officer:</b>	<b>HELEN RODGERS REVENUES MANAGER</b>
<b>Policy Framework and Procedure Rules:</b>	<b>Local authorities can use their discretion to grant rates relief on all or part of the amount of non-domestic rates payable to eligible businesses under section 47 of the Local Government Finance Act 1988 (the Act). The Welsh Government will then reimburse authorities for any relief that is provided.</b>
<b>Executive Summary:</b>	<b>The purpose of the report is to seek approval from Cabinet to adopt the Welsh Government’s Food and Drink Hospitality Rates Relief Scheme 2026-27. The Welsh Government will provide grant funding to local authorities in Wales to deliver the Food and Drink Hospitality Rates Relief scheme to eligible businesses for 2026-27.  The scheme aims to provide support for eligible occupied properties by offering a discount of 15% on non-domestic rates bills for such properties.</b>

## 1. Purpose of Report

- 1.1 The purpose of the report is to seek approval from Cabinet to adopt the Welsh Government’s Food and Drink Hospitality Rates Relief Scheme 2026-27

## 2. Background

- 2.1 The Welsh Government has announced a new Food and Drink Hospitality Rates Relief Scheme for 2026-27 (‘the Scheme’). The Scheme will support hospitality businesses by offering a discount of 15% on non-domestic rates bills for properties being used for the sale of food and/or drink to visiting members of the public.

- 2.2 The Scheme will apply to all eligible businesses, however, the relief will be subject to a cap on the amount each business can claim across Wales. The total amount of relief available is £110,000 across all properties occupied by the same business. All businesses are required to make a declaration that the amount of relief they are seeking across Wales does not exceed this cap, when applying to individual local authorities. They will also need to declare that they shall not receive more than £315,000 in total of Minimal Financial Assistance (MFA), as defined in the Subsidy Control Act 2022, within a three-year period (consisting of the 2026-27 year and the two previous financial years). The Scheme sets out the various categories of food and/or drink premises that will benefit from relief. These are detailed in **Appendix A** of the report, but broadly the premises included are occupied pubs, restaurants, cafes, bars and live music venues across Wales.
- 2.3 The authority will provide the relief using its discretionary relief powers under section 47 of the Local Government Finance Act 1988. It is for the authority to adopt the Scheme and decide in each individual case when to grant relief under section 47. The Welsh Government will reimburse the authority for the relief that is provided via a grant under section 31 of the Local Government Act 2003.
- 2.4 The Welsh Government grant will be equivalent to a 15% rates relief for eligible properties for the 2026-27 financial year.
- 2.5 The Scheme will run alongside the Small Business Rates Relief Scheme. Small Business Rates Relief is awarded automatically on a maximum of 2 occupied properties in the same business name in any local authority area where the property has a rateable value under £12,000.
- 2.6 It is estimated that, due to the limit of £110,000 per business across Wales, there will be in the region of 142 eligible ratepayers across the county borough that could potentially benefit from having to pay 15% less on their rates bill for the 2026-27 financial year under this Scheme.

### **3. Current situation / proposal**

- 3.1 The Council can elect to adopt the Scheme but cannot amend the Scheme. It is proposed that the Council adopts the Scheme for 2026-27 by authorising the appropriate determination and decision, as required by Sections 47(1) (a) and 47(3) respectively of the Local Government Finance Act 1988.
- 3.2 Full details of the Scheme and the guidance on the application of the Scheme have been received from Welsh Government. Due to the limit of £110,000 per business throughout Wales and the £315,000 in total of MFA over three years including 2026-27, Welsh Government have stated that this scheme will need to be administered on an application basis only. If this Council adopts the Scheme, application forms will be made available on Bridgend County Borough Council's website for all qualifying ratepayers to apply. It is proposed that, upon receipt of a valid application form, the decision to award relief be made by the Revenues Manager providing all terms of the Scheme are met.

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

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

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

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

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

#### **6. Climate Change 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 and corporate parent implications arising from this report.

#### **8. Financial Implications**

8.1 Welsh Government has provided the Council with an estimated funding allocation for 2026-27 of £329,452 towards the cost of the relief, along with funding of £13,003 towards the cost of administering the scheme. As these figures are based upon estimates of the likely number of ratepayers eligible for support, they are subject to change.

#### **9. Recommendation**

9.1 It is recommended that Cabinet:

- adopts the Non-Domestic Rates Food and Drink Hospitality Rates Relief Scheme 2026-27 as detailed within **Appendix A**.

#### **Background documents:**

None

### Resolution

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

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

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

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

(c) The Council decides, under Section 47(3) of the Local Government Finance Act 1988, that during the billing year 2026-27 'The Scheme' shall apply to the hereditaments described..

### The Scheme to be Adopted

#### Introduction

This relief is aimed at eligible businesses in the food and drink hospitality sector, for example pubs, restaurants, cafés, bars and live music venues. The aim of the relief is to support these sectors to manage continued cost pressures.

The Welsh Government will provide grant funding to all 22 local authorities in Wales to deliver Food and Drink Hospitality Rates Relief to eligible businesses for 2026-27. The relief will support eligible occupied properties by offering a discount of 15% on non-domestic rates bills for such properties. The relief will apply to all eligible businesses, subject to a cap on the amount each business can claim across Wales. The total amount of relief available is £110,000 across all properties occupied by the same business. All businesses are required to make a declaration when applying to individual local authorities, confirming that the amount of relief they are seeking across Wales does not exceed this cap.

Properties that will benefit from this relief will be occupied food and drink hospitality properties, such as pubs, restaurants, cafés, bars and live music venues across Wales. More detailed eligibility criteria and exceptions to the relief are set out below.

Relief should be granted to each eligible business as a reduction to its rates bill based on occupation between 1 April 2026 and 31 March 2027. It is intended that, for the purposes of this relief, eligible properties will mean the following (subject to the other criteria in this guidance).

## **Hereditaments that are being used for the sale of food and/or drink to visiting members of the public, such as:**

- Pubs
- Restaurants
- Cafés
- Bars
- Live music venues

Live music venues are properties that are wholly or mainly used for the performance of live music for the purpose of entertaining an audience. An eligible property can only be used for other activities which are ancillary or incidental to the performance of live music (e.g. the sale of food or drink to audience members) or do not affect this primary use (e.g. infrequent use of the venue as a polling station or community event). Many live music venues are classified as other property types which are eligible for this relief (e.g. pubs, restaurants and bars). A property is not a live music venue for the purpose of this relief if it is wholly or mainly used as a nightclub or a theatre.

### **Other considerations**

To qualify for the relief, the hereditament should be wholly or mainly used for the qualifying purposes. In a similar way to other reliefs, this is a test on use rather than occupation. Therefore, hereditaments that are occupied, but not wholly or mainly used for the qualifying purpose, will not qualify for the relief.

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

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

### **Properties not considered to be eligible for Food and Drink Hospitality Rates Relief**

The following uses of hereditaments and other circumstances are not considered to be eligible for the relief. In some cases, it will be for local authorities to determine if hereditaments are of a type listed and would not be eligible.

#### **Hereditaments that are:**

- Subject to the retail multiplier
- Used wholly or mainly for the provision of living accommodation as a business (e.g. hotels, guest and boarding houses, holiday homes, and caravan parks and sites)
- Used wholly or mainly for the sale of goods to visiting members of the public (e.g. shops, showrooms, retail warehouses and supermarkets)

- Used wholly or mainly for the sale or provision of services to visiting members of the public (e.g. financial or professional services, salons and launderettes)
- Used wholly or mainly for sports and leisure facilities for visiting members of the public (e.g. sports centres, visitor attractions, theatres and cinemas)
- Used wholly or mainly for the assembly of visiting members of the public (e.g. clubhouses, public halls and institutions)

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

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

### **Hereditaments that are not occupied**

Hereditaments that are not occupied are not eligible this relief. However, such properties may be eligible for 100% Empty Property Rates Relief for the first three months (and in certain cases, six months) that they are empty. If a hereditament becomes occupied and used for an eligible purpose, it may qualify for the relief for the remainder of the year from the date of occupation.

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

Hereditaments owned, rented or managed by a local authority, such as visitor centre restaurants and council-run coffee shops are not eligible for the relief.

### **How much relief will be available?**

The total amount of government funded relief available for each property under this scheme for 2026-27 is 15% of the relevant bill. This is subject to a cap of £110,000 per business across all their properties in Wales.

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

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

Amount of relief to be granted =  $V \times 0.15$ , where

V is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and any other discretionary reliefs (excluding those where local

authorities have used their discretionary relief powers introduced by the Localism Act 2011, which are not funded by section 31 grants).

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

Businesses that occupy more than one property will be entitled to Food and Drink Hospitality Rates Relief for each of their eligible properties, within the cap of £110,000 per business across Wales. This includes any eligible properties which are excluded from Small Business Rates Relief due to the multiple occupation rule.

A business with a single property with a remaining liability (after reliefs) greater than £733,333 can use the entire allocation of relief. No other properties owned by that business will be eligible for relief.

### **Changes to existing hereditaments, including change in occupier**

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

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

### **Retrospective claims for Retail, Leisure and Hospitality Rates Relief in respect of prior years**

Awards of Retail, Leisure and Hospitality Rates Relief for previous financial years may not be made retrospectively, unless the local authority determines that the ratepayer could not reasonably have been expected to apply in the relevant year. Whilst the broad powers of local authorities enable discretionary relief to be retrospectively awarded, funding for any such awards is only covered by the terms of the funding agreement for the current year if the condition for a retrospective application has been met. Retrospective adjustments may otherwise only be made where relief has already been awarded under the terms of the relief in the relevant year and the ratepayer's liability is subsequently revised as a consequence of a change in circumstances (e.g. a change of rateable value).

### **The cash cap and subsidy control**

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

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

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

To the extent that a local authority is seeking to provide relief that falls below the Minimal Financial Assistance (MFA) thresholds, the Subsidy Control Act 2022 allows an economic actor (e.g. a holding company and its subsidiaries) to receive up to £315,000 across the UK in a 3-year period (consisting of the 2026-27 year and the two previous financial years). Local authorities should ask the ratepayers, on a self-assessment basis, to declare as part of their application for Food and Drink Hospitality Rates Relief that they are not in breach of the cash cap or MFA limit.

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

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

Subsidy Control Unit

Welsh Government

Cathays Park

Cardiff

CF10 3NQ

Email: [SubsidyControlUnit@gov.wales](mailto:SubsidyControlUnit@gov.wales)

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>INFORMATION REPORT FOR NOTING</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CHIEF OFFICER – LEGAL AND REGULATORY SERVICES, HR AND CORPORATE POLICY</b>
<b>Responsible Officer:</b>	<b>MICHAEL PITMAN – TECHNICAL SUPPORT OFFICER DEMOCRATIC SERVICES</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the policy framework and procedure rules.</b>
<b>Executive Summary:</b>	<b>To update Cabinet with an information report published since the last Cabinet meeting</b>

## 1. Purpose of Report

- 1.1 The purpose of this report is to inform Cabinet of the Information Report for noting that has been published since its last scheduled meeting.

## 2. Background

- 2.1 It was previously resolved to approve a revised procedure for the presentation to Cabinet and Council of Information Reports for noting.

## 3. Current situation / proposal

### 3.1 Information Report

The following Information Report has been published since the last meeting of Cabinet:-

<u>Title</u>	<u>Date Published</u>
Porthcawl Harbour Annual Report 2025-26	10 March 2026

### 3.2 Availability of Document

The document has been circulated to Elected Members electronically via

email and placed on the Bridgend County Borough Council website. The document is available from the above date of publication.

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

- 4.1 The protected characteristics identified within the Equality Act, Socio-economic Duty and the impact on the use of the Welsh Language have been considered in the preparation of this report. As a public body in Wales the Council must consider the impact of strategic decisions, such as the development or the review of policies, strategies, services and functions. This is an information report, therefore it is not necessary to carry out an Equality Impact assessment in the production of this report. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

#### **5. Well-being of Future Generations Implications and Connection to Corporate Well-being Objectives**

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

#### **6. Climate Change and Nature Implications**

- 6.1 There are no climate change and 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 in relation to this report.

#### **9. Recommendation**

- 9.1 That Cabinet acknowledges the publication of the report referred to in paragraph 3.1 above.

#### **Background documents**

None

<b>Meeting of:</b>	<b>CABINET</b>
<b>Date of Meeting:</b>	<b>10 MARCH 2026</b>
<b>Report Title:</b>	<b>PORTHCAWL HARBOUR ANNUAL REPORT 2025-26</b>
<b>Report Owner: Responsible Chief Officer / Cabinet Member</b>	<b>CABINET MEMBER REGENREATION, ECONOMIC DEVELOPMENT AND HOUSING  CORPORATE DIRECTOR COMMUNITIES</b>
<b>Responsible Officer:</b>	<b>HEAD OF PUBLIC REALM</b>
<b>Policy Framework and Procedure Rules:</b>	<b>There is no effect upon the Policy Framework and Procedure Rules.</b>
<b>Executive Summary:</b>	<b>The purpose of this information report is to present to Cabinet the Porthcawl Harbour Annual Report, 2025-26. The reports sets out the context for the Porthcawl Harbour, its main activities and its governance.</b>

## **1. Purpose of Report**

- 1.1 The purpose of this information report is to present to Cabinet the Porthcawl Harbour Annual Report, 2025-26.

## **2. Background**

- 2.1 Porthcawl Harbour is situated on the Bristol Channel which is famous for its large tidal range and strong currents making it a hazardous area to navigate. The Bristol Channel has a large amount of commercial activity and, very often, ships navigating their way up to Bristol Docks can be seen laden with containers, cars and raw materials for distribution across the UK.
- 2.2 Bridgend County Borough Council (BCBC) are granted powers to assist in the operation, maintenance and development of Porthcawl Harbour. The Council is identified as being the Harbour Authority with the undertakings associated with the Harbour being vested in the Council.
- 2.3 Porthcawl Harbour is home to the Royal National Lifeboat Institution's (RNLI) busiest inshore lifeboat station in Wales and consequently a very active branch of National Coastwatch Institute (NCI). Both charities are dedicated to working with BCBC to improve water safety across the coastline of Bridgend County Borough.
- 2.4 Porthcawl Harbour is also home to Porthcawl Marina and the Marina Basin. Since opening in 2013, the Marina has performed well in terms of generating income and has a healthy demand for moorings with a consistent waiting list of around 50 people.

### **3. Current situation/ proposal**

- 3.1 The governance aspects of Porthcawl Harbour are overseen by the Porthcawl Harbour Board. This is supported by an Operational Group.
- 3.2 The Porthcawl Harbour Board is chaired by the Corporate Director Communities. Members of the Board include senior officers from the Communities Directorate and Finance Department as well as the Harbourmaster. The Board meets once a year. At its last meeting the Board approved the Harbour Annual Report, 2025-26, which is attached at **Appendix 1** for information.
- 3.3 The Operational Group exists to ensure the safe and effective operation of the marina facility and advise the Harbour Board on matters of importance. The group is chaired by the Harbourmaster and includes Bridgend County Borough Council officers from relevant departments as well as representatives from RNLI, NCI and Absolute Property Management. The Operational Group meets twice a year.

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

- 4.1 This is an information report, therefore it is not necessary to carry out an Equality Impact assessment in the production of this report. It is considered that there will be no significant or unacceptable equality impacts as a result of this report.

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

- 5.1 The Harbour Annual Plan demonstrates work towards the sustainable development principle by ensuring that by meeting the needs of the present they do not compromise the ability of future generations to meet their own needs. This is evidenced through the 5 ways of working as follows:
- Long-term: The strategic objectives and foundations for delivery focus on long-term management and operation of the Harbour.
  - Prevention: The changing nature of the Harbour area and its users is monitored and managed.
  - Integration: The Annual Report demonstrates that implementation integrates with current and future operations.
  - Collaboration: The process for developing and implementing activity covered by the Annual Report is carried out in close partnership with relevant internal and external stakeholders.
  - Involvement: The Harbour governance integrates the Harbour Board and The Harbour Operational Group.

### **6. Climate Change and Nature Implications**

- 6.1 No impact resulting from this report.

## **7. Safeguarding and Corporate Parent Implications**

7.1 No impact resulting from this report.

## **8. Financial Implications**

8.1 The detailed accounting and auditing requirements relating to Harbour authorities are set out in the Harbours Act 1964. In accordance with this Act, statutory Harbour undertakings (such as local authorities that are also harbour authorities) are required to prepare an annual statement of accounts relating to Harbour activities. This requirement is not met by the preparation of accounts that covers matters in addition to Harbour activities. Consequently, the inclusion of Harbour activities within a local authority's statement of accounts will not satisfy the Act and a standalone annual statement of accounts relating solely to Harbour activities, drawn from the local authority's accounting records, is required.

8.2 Harbour authority Auditors are requested to provide the following information:

- confirmation as to whether or not their audited bodies are Harbour authorities;
- confirmation as to whether or not their audited bodies currently prepare Harbour authority accounts;
- annual income and expenditure for the Harbour authority functions (where available); and confirmation as to whether or not the Harbour authority accounts are audited.

## **9. Recommendation**

9.1 It is recommended that Cabinet note the contents of this report.

## **Background documents**

None.

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## **PORTHCAWL HARBOUR ANNUAL REPORT 2025-26**

Created: 30/09/2025  
Author: Jay Castle

## **CONTENTS**

- 1. Introduction**
  - **Porthcawl Harbour**
  - **Porthcawl Marina**
- 2. Service Usage**
- 3. Strategic Objectives & Foundations of Delivery**
- 4. Governance**
- 5. Financials**

## 1. Introduction

### Porthcawl Harbour

Porthcawl Harbour is situated on the Bristol Channel. Bridgend County Borough Council (BCBC) are granted powers to assist in the operation, maintenance and development of Porthcawl Harbour and must act in the capacity of the Harbour Authority under the provisions of Part V of the Mid Glamorgan County Council Act 1987 ("the 1987 Act"). The Council is identified as being the Harbour Authority with the undertakings associated with the Harbour being vested in the Council. A plan of the harbour area (shaded red) can be found in Appendix 1.

Operational management is conducted by the Communities Directorate with a Harbourmaster and operational staff structure in place. The asset management and repair and replacement obligations are reported to the Harbour Board who ensure that the Council's obligations under the Mid Glamorgan Act 1987 are complied with.

Porthcawl Harbour is home to the Royal National Lifeboat Institution's (RNLI) busiest inshore lifeboat station in Wales and consequently a very active branch of National Coastwatch Institute (NCI). Both charities are dedicated to working with BCBC to improve water safety across the coastline of Bridgend County Borough.

The Harbour now attracts various groups of individuals, some visiting the site for social purposes to visit the commercial food and drink premises or to participate in a full range of coastal and water-based activities. Activities include, but are not limited to, fishing, sailing, powerboating, water-skiing, stand-up paddle boarding, open water swimming and kayaking. The Harbour has also become a popular location for events including BeachFest, RescueFest, numerous Triathlons and the Harbour played a significant role in the Porthcawl 10K in recent years.

### Porthcawl Marina

Located in the Harbour, Porthcawl Marina has performed well in terms of generating income and has a healthy demand for moorings with a consistent waiting list since opening in 2013.

The service is evidencing good performance in relation to occupancy and retention, with targeted income generation and control over controllable costs. The nature of the environment and patterns of usage can however often generate maintenance costs that are hard to foresee.

Porthcawl Marina and its capital redevelopment has been a strong contributor to the regeneration of Porthcawl and the continuing investment plans for the area. The creation of a 70 berth Marina with spaces for commercial operators and visitors has transformed the vibrancy of the area and increased usage considerably.

The Marina is well-located to attract visitors from across the Bristol Channel and the service can evidence high demand. The occupancy of berths is high, generating close to maximum income and visitor income has remained steady.

The Marina also fulfils the function of providing safe-haven for vessels and works in partnership with the RNLI. Maintaining the assets in good order and maintaining a safe and customer responsive environment are key objectives for the service.

### Harbour or Marina – what’s the difference?

From an operational standpoint, an observer could be forgiven for assuming that the Porthcawl Harbour and Porthcawl Marina are one in the same. However, there are some important distinctions.

- The harbour is a legal entity that has powers and responsibilities attached to it (BCBC is designated as a Harbour Authority under the Mid Glam Act 1987)
- The harbour encompasses a large area (see Appendix 1) with many stakeholders and responsible BCBC departments. The marina accounts for a much smaller area within the harbour (see Appendix 2), and is the responsibility of the Harbourmaster & Harbour Board.
- The harbour and marina are financially distinct; the marina attracts berthing fees that meet the needs of its operation. The harbour does not have any income associated with it, and significant asset maintenance costs (walls, dredging, sea defences, breakwater etc.)

## 2. Service Usage

### Marina Berths

6 metre	8 metre	10 metre	12 metre	Commercial	Visitor	Total
15	30	16	2	3	2	68

### Annual Berth Occupancy

6 metre	8 metre	10 metre	12 metre	Commercial	Total	%
15	26	14	2	3	60	91%

### Completed Visitor Bookings

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
1	1	1	3	17	8	16	13	8	1	1	1	71

### **3. Strategic Objectives & Foundations for Delivery**

The following objectives were defined during the recent update of the Porthcawl Marina Operational Business Plan. Although created for the marina, the objectives also provide a strong foundation for the operation of the harbour.

#### **Strategic Objectives**

- Provide a good standard of customer service and value for money
- Pursue maximum occupancy and ensure that demand for berths remains strong
- Ensure that processes are fair, consistent and transparent
- Actively pursue additional income streams
- Proactively invest in asset infrastructure
- Maintain focus on cost control
- Support public events and regeneration plans linked to Porthcawl
- Improve the quality of the service and promote via accreditation

#### **Foundations for Delivery**

- Fairness, Consistency and Transparency
- Provide value for money for customers and the community
- Safeguard our natural and built environments
- Promote maritime and coastal culture

These objectives are monitored via reports presented to the Harbour Board.

### **4. Governance**

#### **Harbour Board**

The Harbour Board have recently agreed a new Terms of Reference document for its structure and activities. The following are elements of the new terms, and the full document can be found in Appendix 3.

#### **Purpose**

- The Harbour Board provides strategic governance, oversight, and decision-making for the management, operation, and development of Porthcawl Harbour.
- The Board ensures that the Harbour is operated safely, lawfully, sustainably, and in a manner that supports economic activity, service users, and the long-term interests of Bridgend County Borough Council.

#### **Key Objectives**

The Harbour Board's objectives are to:

- Ensure compliance with all statutory and legal obligations relating to the Harbour

- Oversee the effective governance and management of harbour and marina operations
- Support the ongoing development of the harbour area and planned investments
- Ensure that harbour and marina assets are properly maintained and remain fit for purpose
- Ensure that the business plan and financial performance meet agreed performance standards
- Ensure that service users and stakeholders are appropriately engaged in reviewing services and future plans.

### Membership

#### Chair

- Corporate Director – Communities

#### Members

- Head of Service – Community Operations
- Economy and Natural Resources Manager
- Harbour Master
- BCBC Finance Manager
- Group Manager – Property Services / Senior Portfolio Surveyor

#### Attendance

- Other officers or advisers may attend by invitation to provide specialist input
- Substitutes are not normally permitted unless agreed by the Chair

### Meetings

- The Harbour Board shall meet **twice per annum**, normally in **February and October**
- Additional meetings may be convened at the discretion of the Chair if required\*
- Meetings may be held in person or remotely, subject to Council arrangements

\*An example of an additional meeting is a single-issue meeting convened in June or July each year to sign off the previous year's accounts.

### Stakeholders Group

#### Key Purpose

To ensure the safe and effective operation of the marina facility and advise the Harbour Board on matters of importance.

<b>Chair</b>	Harbourmaster
<b>Membership</b>	Senior Portfolio Surveyor Marina Group Representative NCI Porthcawl – Station Manager Absolute Property Management – Jennings Building Corporate Health and Safety Representative RNLI Representative
<b>Status of Board</b>	Advisory
<b>Frequency of meeting</b>	2 per annum (March, September)

### Areas of Focus

- To review the operational systems and procedures in place at the Marina.
- To receive the views and issues presented by stakeholders.
- To review incidents and accidents and improve the safe operation of harbour.
- To identify opportunities for improvement of services and business development within the Marina.
- To review systems of promotion and communication relating to Harbour activities.

In addition to the above governance structure, the Harbourmaster meets twice a year with representatives of the berth holders of Porthcawl Marina. These meetings allow discussion and resolution of issues specifically related to the use of the marina facilities.

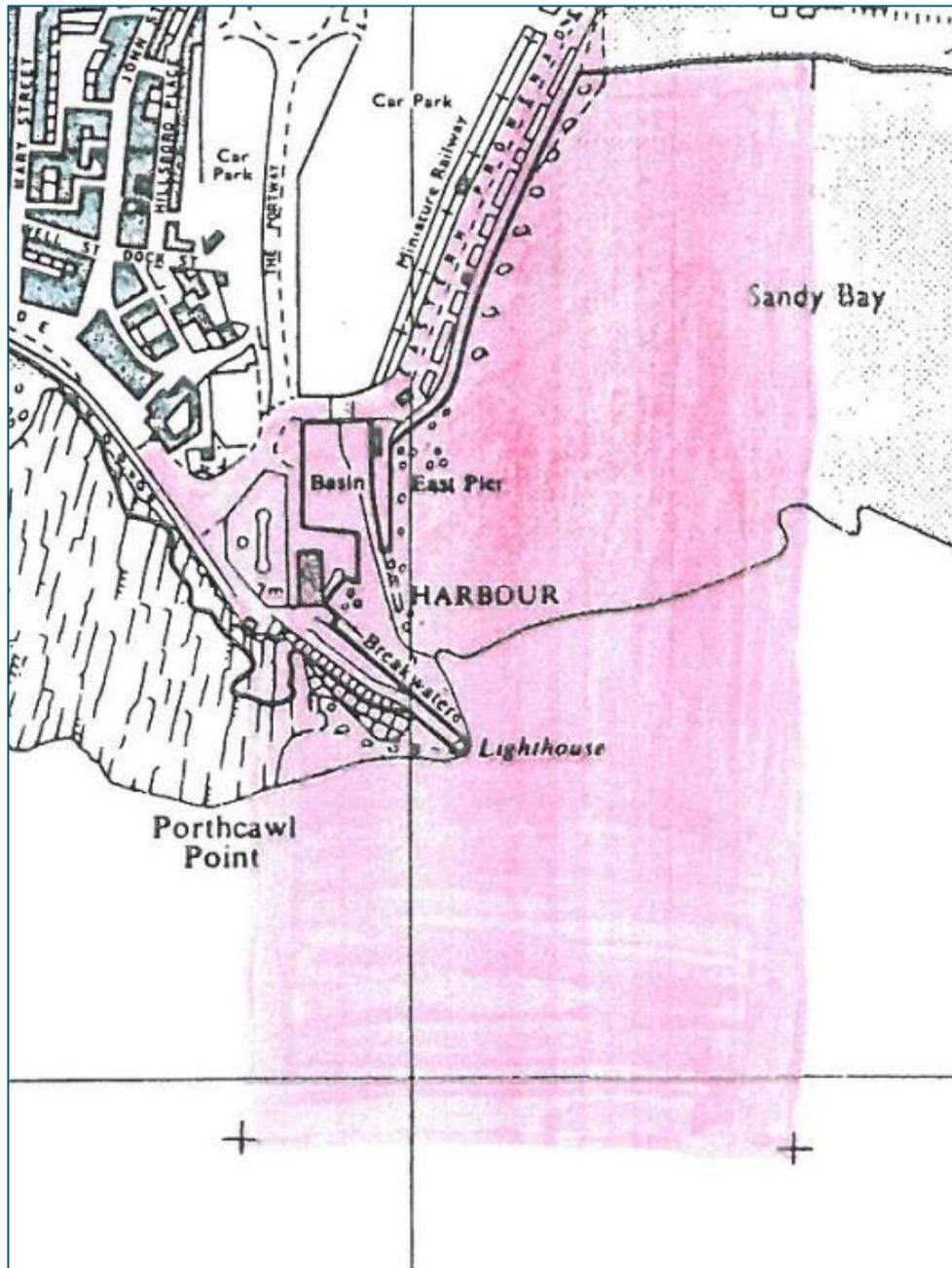
## **5. Financials**

The detailed accounting and auditing requirements relating to Harbour authorities are set out in the Harbours Act 1964. In accordance with this Act, statutory Harbour undertakings (such as local authorities that are also harbour authorities) are required to prepare an annual statement of accounts relating to Harbour activities. This requirement is not met by the preparation of accounts that covers matters in addition to Harbour activities. Consequently, the inclusion of Harbour activities within a local authority's statement of accounts will not satisfy the Act and a standalone annual statement of accounts relating solely to Harbour activities, drawn from the local authority's accounting records, is required.

The accounts are available - <https://www.bridgend.gov.uk/media/3uqhnv0q/porthcawl-harbour-annual-return-2024-25.pdf>

## **6. Appendix**

### **Appendix 1- Mid Glamorgan Act 1987 – Porthcawl Harbour Plan**



Mid Glamorgan Act  
1987 - Porthcawl Ha

**Appendix 2 – Satellite View of Porthcawl Marina**



## Appendix 3 – Porthcawl Harbour Board Terms of Reference



Porthcawl Harbour  
Board - Terms of Ref

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