

NOTICE OF MEETING

Meeting: RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL

Date and Time: THURSDAY, 20 MARCH 2025, AT 10.00 AM

Place: COUNCIL CHAMBER - APPLETREE COURT, BEAULIEU ROAD, LYNDHURST, SO43 7PA

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PUBLIC INFORMATION:

This agenda can be viewed online (<https://democracy.newforest.gov.uk>). It can also be made available on audio tape, in Braille and large print.

Members of the public are welcome to attend this meeting. The seating capacity of our Council Chamber public gallery is limited under fire regulations to 22.

Members of the public can watch this meeting live, or the subsequent recording, on the [Council's website](#). Live-streaming and recording of meetings is not a statutory requirement and whilst every endeavour will be made to broadcast our meetings, this cannot be guaranteed. Recordings remain available to view for a minimum of 12 months.

PUBLIC PARTICIPATION:

Members of the public may speak in accordance with the Council's [public participation scheme](#):

- (a) on items within the Resources and Transformation Overview and Scrutiny Panel's terms of reference which are not on the public agenda; and/or
- (b) on individual items on the public agenda, when the Chairman calls that item. Speeches may not exceed three minutes.

Anyone wishing to attend the meeting, or speak in accordance with the Council's public participation scheme, should contact the name and number shown above no later than 12.00 noon on Monday, 17 March 2025.

Kate Ryan
Chief Executive

Appletree Court, Lyndhurst, Hampshire. SO43 7PA
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AGENDA

Apologies

1. MINUTES

To confirm the minutes of the meeting held on 20 November 2024 as a correct record.

2. DECLARATIONS OF INTEREST

To note any declarations of interest made by members in connection with an agenda item. The nature of the interest must also be specified.

Members are asked to discuss any possible interests with Democratic Services prior to the meeting.

3. PUBLIC PARTICIPATION

To receive any public participation in accordance with the Council's public participation scheme.

4. CORPORATE PEER CHALLENGE REPORT AND ACTION PLAN (Pages 5 - 62)

To receive a report on the outcome of the Corporate Peer Challenge, together with the associated action plan.

5. FUTURE NEW FOREST PROGRAMME (Pages 63 - 76)

To receive updates on various aspects of the Future New Forest programme, including a people strategy, digital projects, and assets strategy.

6. ANNUAL ICT DELIVERY UPDATE (Pages 77 - 88)

To receive the Annual ICT Delivery Update.

7. DIGITAL STRATEGY 2025 - 2028 (Pages 89 - 110)

To receive a proposed Digital Strategy for the years 2025-2028.

8. PLATINUM JUBILEE BUSINESS PARK (Pages 111 - 126)

To receive an update on the Platinum Jubilee Business Park.

9. PERFORMANCE DASHBOARDS (Pages 127 - 140)

To receive performance data on services falling under the scope of this Panel.

10. PORTFOLIO HOLDER'S UPDATE

An opportunity for the Portfolio Holders to provide an update to the Panel on developments within their portfolio.

11. WORK PROGRAMME (Pages 141 - 144)

To note the Panel's work programme.

12. ANY OTHER ITEMS WHICH THE CHAIRMAN DECIDES ARE URGENT

To: **Councillors**

Alan O'Sullivan (Chairman)
Barry Dunning (Vice-Chairman)
Alan Alvey
Jack Davies
Jacqui England

Substitutes

John Adams
Peter Armstrong
Philip Dowd

Councillors

Barry Rickman
Alex Wade
Christine Ward
Phil Woods

Substitutes

David Harrison
Alvin Reid
Joe Reilly

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Resources and Transformation Panel – 20 March 2025

Corporate peer challenge report and action plan

Purpose	For Decision
Classification	Public
Executive Summary	<p>The report presents the Local Government Associations (LGA) feedback report from the December 2024 Corporate Peer Challenge and associated action plan.</p> <p>In consideration of capacity to deliver on the council’s ambitions and respond effectively to the Devolution White Paper, as recommended by the peer team, the report also presents a revised list of key deliverables in support of corporate priorities.</p> <p>The report also presents a motion referred to the Resources and Transformation Overview and Scrutiny Panel, regarding the Council’s process for selecting Chairmen and Vice-Chairmen of Committees and Panels, given that the Corporate Peer Challenge report makes specific commentary on the appointment of Overview and Scrutiny Panel chairs.</p>
Recommendation(s)	<p>The Panel is asked to:</p> <ol style="list-style-type: none"> 1. Note the LGA’s feedback report 2. Provide feedback to Cabinet on the action plan at Appendix 2 in response to the recommendations and observations contained within the feedback report 3. Provide feedback to Cabinet on the revised key deliverables at Appendix 3 4. Consider the motion referred to the Panel set out at paragraph 18, with regard to the process for selecting

	Chairmen and Vice-Chairman of Committees and Panels, and make recommendations to Cabinet, and Council.
Reasons for recommendation(s)	<p>Recommendations support the continuous improvement focus of the corporate peer challenge, including the council’s key strategic priorities within the Corporate Plan.</p> <p>The Corporate Peer Challenge process requires the council to publish the findings on the review and an associated action plan.</p>
Ward(s)	All
Portfolio Holder(s)	Councillor Jill Cleary – Leader of the Council
Strategic Director(s)	Kate Ryan – Chief Executive
Officer Contact	<p>Rebecca Drummond Assistant Director – Transformation 023 8028 5080 rebecca.drummond@nfdc.gov.uk</p>

Introduction and background

1. In December 2024 NFDC invited the Local Government Association (LGA) to carry out a corporate peer challenge (CPC). This process aims to provide robust, strategic and credible challenge to our activity designed to support our decisions, ambitions and appraise our current performance and improvement capabilities.
2. Over three days a team of five peers and two representatives from the LGA visited the council and gathered evidence, information, and views from more than 40 meetings and spoke to more than 130 people including a range of council staff together with members and external stakeholders.
3. The team was made up of both political and managerial peers from different authorities across the country.
4. Initial feedback was presented in person at the end of the onsite visit and is now further supported by the LGA feedback report (Appendix

- 1), detailing recommendations and observations based on their findings during the challenge.
5. The outcome of the peer challenge is extremely positive and worth celebrating in its own right. The peer team made some observations and recommendations to support our continued improvement, dealt with later in this report, but commended the council on its clear vision, how much it has already achieved, the visibility of the Leader and the Chief Executive, the passion and commitment of Members and its staff being the greatest asset. They thanked all staff for their openness and honesty throughout the process.
 6. The peer team reflected that it was great to see the organisation on an improvement journey with some of the comments they received during the review including that the council has a heart and cares, has been proactive and shown great leadership, that it delivers for residents and staff saying that they are proud to say they work for New Forest District Council.
 7. It is a requirement of the process that the Feedback report is published three months after the visit (by 12 March 2025), followed by an action plan five months after the visit (by 12 May 2025).

Recommendations and action plan

8. The peer team's key recommendations to the council are:
 - Clarify priorities and timelines for delivery
 - Create an overarching corporate narrative and communicate proactively with staff, members and local people
 - Design and deliver a robust member and senior officer development programme
 - Consider ways to strengthen the Overview and Scrutiny function
 - Ensure there is effective ownership of the transformation programme by the Executive Management Team
 - Apply internal policies and practices consistently across the Council
 - Develop an assets strategy and action plan
 - Demonstrate further commitment to carbon reduction with a clear action plan
 - Continue the good practice in housing and consider applying successful approaches to the wider organisation
 - Remember to celebrate your achievements no matter how small or big they are
9. The next stage of the peer challenge process commits us to publishing an action plan, outlining our intentions, activity and

timelines towards addressing the recommendations within the LGA feedback report.

10. The report also makes a number of observations and suggestions and these have also been considered as opportunities for improvement in the action plan at Appendix 2.
11. The feedback report refers to the fact the Devolution White Paper was published after the CPC visit and its initial findings. It is appropriate that the action plan and consideration of priorities is now framed in this new context.
12. Progress against the action plan will be monitored and formally reported on six months from publication (October 2025).

Key deliverables

13. One of the key recommendations of the peer team is for the council to consider the capacity it needs to deliver on the corporate plan priorities over the short, medium and longer terms, accepting that not all of them can be delivered at the same time.
14. The corporate plan continues to set the strategic direction of the organisation but it's appropriate to consider the legacy priorities and start to refine what we must deliver against these priorities and where capacity would be better redirected considering the new and emerging context.
15. Consideration has been given to key deliverables, as linked to the corporate plan priorities, in response to the recommendation and to reflect the new local government reorganisation context and its demands. Appendix 3 sets out an initial view of the key deliverables although it is acknowledged that these will need to be flexible and kept under review as future demands arise.
16. It is proposed that the delivery plan is subject to regular review by EMT and formally reviewed annually as part of the annual performance report.

Follow up review

17. As part of the CPC, the council is required to have a progress review and publish findings of this within twelve months of the original CPC visit (by 12 December 2025). The follow up visit is anticipated to take place during November 2025 and will coincide with the update on the action plan progress.

Motion referred by Council

18. At the Full Council meeting of 24 February 2025, Cllr Rackham moved the following motion, which was seconded by Cllr J Davies:-

"This Council resolves that:-

- 1. Only those Members who do not belong to the ruling political group shall be eligible for nomination to the positions of Chairman and Vice-Chairman of the ordinary committees and panels of the Council; and*
 - 2. The consequential amendment to the Council's Standing Orders for Meetings be made by the Monitoring Officer."*
19. In accordance with the Council's Standing Orders for Meetings, the Full Council resolved to refer the motion to the Resources and Transformation Overview and Scrutiny Panel, and specifically through the consideration of this report, given the Corporate Peer Challenge report commentary relating to the appointment of opposition Members as Chairs of Overview and Scrutiny Panels.
20. As this is ultimately a matter for the Council to determine, the Panel is asked to consider the motion as set out above, and make onward recommendations to Cabinet, and Council.

Corporate plan priorities

21. A core component of the CPC review is to assess the clarity of the council's priorities, how well informed they are by the local context and whether the council is delivering effectively on these priorities contained within the Corporate Plan.

Options appraisal

22. The council is required by the LGA to publish the findings of the CPC and an associated action plan. The council welcomed the review and is keen to act upon the observations made to ensure continuous improvement.

Consultation undertaken

23. Internal consultation has been undertaken with the Executive Management Team and relevant members of the Senior Leadership Team to inform the action plan.
24. Key deliverables have been informed by the Senior Leadership Team, Executive Management Team and Cabinet members.

25. The feedback report has been shared with our stakeholders and partners that contributed to the peer challenge with their valuable insight.

Financial and resource implications

26. Actions identified are within existing resources.

Legal implications

27. There are none arising directly from this report and the reprioritising of planned activities has had due regard to statutory requirements.

Risk assessment

28. A formal risk assessment is deemed not to be required. The CPC visit and subsequent recommendations was immediately prior to the publication of the Devolution White Paper and the emerging impact of local government reorganisation will be taken into account within the actions identified.

Environmental / Climate and nature implications

29. The action plan directly responds to the CPC recommendation for the council to demonstrate further commitment to carbon reduction with a clear action plan.

Equalities implications

30. The CPC feedback report makes a few observations on how equality, diversity and inclusivity can be improved, acknowledging that the council has already driven forward efforts in this regard. These observations have been included in the action plan to further enhance our commitments in this area.

Crime and disorder implications

31. There are none arising directly from this report.

Data protection / Information governance / ICT implications

32. The CPC feedback report makes an observation on how the consistent use of technology can be improved. This observation has been included in the action plan.

Appendices:

Appendix 1 – LGA Corporate Peer
Challenge New Forest District
Council (10th-12th December 2024)
Feedback Report
Appendix 2 – CPC Action Plan
Appendix 3 – Corporate Priorities –
key deliverables review

Background Papers:

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LGA Corporate Peer Challenge

New Forest District Council

10th to 12th December 2024

Feedback report



Corporate Peer Challenge



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1. Introduction

Corporate Peer Challenge (CPC) is a highly valued improvement and assurance tool that is delivered by the sector for the sector. It involves a team of senior local government councillors and officers undertaking a comprehensive review of key finance, performance and governance information and then spending three days at New Forest District Council to provide robust, strategic, and credible challenge and support.

CPC forms a key part of the improvement and assurance framework for local government. It is underpinned by the principles of Sector-led Improvement (SLI) put in place by councils and the Local Government Association (LGA) to support continuous improvement and assurance across the sector. These state that local authorities are: Responsible for their own performance, Accountable locally not nationally and have a collective responsibility for the performance of the sector.

CPC assists councils in meeting part of their Best Value duty, with the UK Government expecting all local authorities to have a CPC at least every five years.

Peers remain at the heart of the peer challenge process and provide a 'practitioner perspective' and 'critical friend' challenge.

This report outlines the key findings of the peer team and the recommendations that the council are required to action.

2. Executive summary

New Forest District Council (the Council) is a well-performing council that clearly understands its unique local context which consists of the New Forest National Park, urban areas and 40 miles of coastline. The peer team enjoyed spending time in the New Forest.

There is widespread acceptance that changes in leadership of the Council since the last CPC in 2017, with both a new Leader and new chief executive, has been instrumental in creating a culture of change and improvement. Both the Leader and the chief executive were consistently described by officers, members and external stakeholders as highly visible, collaborative and engaging. Under their leadership the

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Council has embraced partnership working, become more outward facing, and maximised its role as an effective convener. As a result, the Council now plays a more credible role on the local and regional stage, both at the political and officer levels.

The Council is now more prominent in maximising exciting regeneration opportunities, such as the delivery of Solent Freeport and town centre regeneration. It works effectively in partnership with businesses, community groups, culture and health partners on a range of areas, as well as continuing to work closely with the New Forest National Park Authority.

Members and officer working relationships are effective, supportive and characterised by mutual respect. Whilst senior members are clearly passionate and committed, there are opportunities for them to have a greater role in setting the direction of the Council. The peer team also heard about the appetite to strengthen the Overview and Scrutiny function and providing more training and support to members on this topic.

The corporate plan clearly sets out an ambitious vision for New Forest, but the peer team consistently heard from staff, members and external partners that there were too many priorities, with a lack of clarity over what would be delivered and by when. Clearer delivery plans for the priorities would improve this. There are also opportunities to make the delivery of the priorities more visible, with the potential to make better use of external and internal communication channels.

The transformation programme, Future New Forest, is in place and has strong commitment from all political groups and staff at all levels. Leadership of the programme is effective, with robust commitment from the Executive Management Team and Senior Leadership Group to deliver it. To further enhance the likelihood of its success, the peer team encourages all members of the Executive Management Team to collectively own the programme, and for its scope to remain focused.

Meeting housing needs is one of the Council's key priorities and the peer team was asked to consider it as an additional area of focus. The Council's development and acquisition programme is centred on local needs; it has strong political support and with effective working relationships between the portfolio holder and the Housing

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department, the Council is well placed to achieve its ambitions. Nevertheless, challenges remain, and the Council will need to maximise partnership working, particularly emerging relationships with tenants, developers and private sector landlords, as well as with charities to tackle homelessness.

Overall, the organisation has strong foundations to deliver on its corporate plan ambitions. Delivery will ultimately rest on the capacity and capability of staff, who are New Forest District Council's strongest asset. The workforce is passionate, enthusiastic and proud to work at New Forest District Council. Crucially, staff are committed to delivering the transformation programme. However, the peer team heard that working practices, policies and the new values were being inconsistently applied across the organisation and that this could undermine staff morale. To sustain this, recognising the issue of capacity and maintaining staff motivation will be important.

The Council is in a solid financial position, because of a prudent approach over many years. Sound governance and audit processes supplement its culture of effective financial management and planning. Reserves have been maintained and officers and members have identified future financial pressures facing the Council. The Council has started to undertake work to be more commercially minded, for example developing proposals to release some of Appletree Court to generate income and pulling together an assets register. As the Council faces increasing financial pressures, further work in this area may strengthen its ability to be financially sustainable.

The Council should be rightly proud of what it has achieved to date, with many improvements taking place behind the scenes. Whilst the Council acknowledges that it remains on a journey with some way to go to further improve, the peer team encourages the Council to celebrate its achievements much more, no matter how big or small they are.

Following the corporate peer challenge, the [Devolution White Paper](#) announced the Government's desire for all of England to benefit from devolution. The White Paper also announced that the Government will facilitate a programme of local government reorganisation for all two tier areas. In light of this, the Council will now need to take

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stock of its priorities and refocus its plans.

3. Recommendations

There are a number of observations and suggestions within the main section of the report. The following are the peer team's key recommendations to the Council:

3.1 Clarify priorities and timelines for delivery

The corporate plan sets out lots of ambitious priorities and not all of them can be delivered at the same time. The Council will need to consider capacity in order to understand what can be delivered over the short, medium and longer terms, particularly in response to the publication of the Devolution White Paper.

3.2 Create an overarching corporate narrative and communicate proactively with staff, members and local people

Only 66 per cent of respondents to the resident's survey said that they feel the Council keeps residents well-informed about the services it provides. A compelling narrative will help staff, members, partners, and residents look towards the future and help them see how they can support the delivery of the corporate plan.

3.3 Design and deliver a robust member and senior officer development programme

Leadership of the Council, both at political and officer levels, is effective. Development days could further strengthen working relationships, particularly in supporting senior members to be more assertive in setting and steering the priorities of the Council.

3.4 Consider ways to strengthen your Overview and Scrutiny function

Members are keen to provide more effective scrutiny and the Council may wish to consider ways to strengthen and develop its Overview and Scrutiny function; one option could be to appoint opposition members as chairs of the Panels.

3.5 Ensure there is collective ownership of the transformation programme by the Executive Management Team

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Collective ownership will ensure that all members of the Executive Management Team are all equally responsible for the delivery of the transformation programme, thereby contributing to the likelihood of its success.

3.6 Apply internal policies and practices consistently across the Council

To maintain staff morale and commitment to the transformation programme, internal policies and practices must be applied consistently across the Council.

3.7 Develop an Assets Strategy and Action Plan

The Council has already begun to understand its physical assets, their liabilities, and future commercial opportunities. The peer team encourages the Council to complete this work and develop a strategy to deal with the assets as part of a coherent corporate asset management appraisal system.

3.8 Demonstrate further commitment to carbon reduction with a clear action plan

The Council has bold ambitions to reduce carbon emissions of council owned homes to net zero by 2050 and to reduce carbon emissions of the housing operational services; the peer team encourages the Council to develop an action plan that will demonstrate how it will deliver these ambitions.

3.9 Continue the good practice in housing and consider applying successful approaches to the wider organisation

There are already examples of transformation and improvement achieved in the Council's Housing department. This presents a valuable opportunity to take the learning, for example the preparation for regulatory inspection, and apply it to other parts of the organisation.

3.10 Remember to celebrate your achievements no matter how small or big they are

The Council has achieved significant change and improvement over the last few years, and there is much to be proud of. Whilst there is more work to be done, do not forget to celebrate your achievements.

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4. Summary of peer challenge approach

4.1 The peer team

Peer challenges are delivered by experienced elected member and officer peers. The make-up of the peer team reflected the focus of the peer challenge and peers were selected by the LGA on the basis of their relevant expertise. The peers were:

- Jonathan Stephenson, Chief Executive, Brentwood Borough Council and Rochford District Council
- Cllr William Nunn, Breckland Council and Norfolk County Council
- Cllr Sarah Osborne, East Sussex County Council
- Claire Astbury, Head of Housing Strategy and Development, Luton Borough Council
- Jane Wilson, Chief Operating Officer, Cambridge City Council
- Eva Barnsley, LGA Policy Adviser
- Nick Searle, LGA Peer Challenge Manager

4.2 Scope and focus

The peer team considered the following five themes which form the core components of all Corporate Peer Challenges. These areas are critical to councils' performance and improvement.

1. **Local priorities and outcomes** - Are the council's priorities clear and informed by the local context? Is the council delivering effectively on its priorities? Is there an organisational-wide approach to continuous improvement, with frequent monitoring, reporting on and updating of performance and improvement plans?
2. **Organisational and place leadership** - Does the council provide effective local leadership? Are there good relationships with partner organisations and local communities?
3. **Governance and culture** - Are there clear and robust governance arrangements? Is there a culture of challenge and scrutiny?
4. **Financial planning and management** - Does the council have a grip on its

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current financial position? Does the council have a strategy and a plan to address its financial challenges? What is the relative financial resilience of the council like?

5. **Capacity for improvement** - Is the organisation able to bring about the improvements it needs, including delivering on locally identified priorities? Does the council have the capacity to improve?

As part of the five core elements outlined above, every Corporate Peer Challenge includes a strong focus on financial sustainability, performance, governance, and assurance.

In addition to these themes, the Council asked the peer team to provide feedback on housing and its transformation programme.

4.3 The peer challenge process

Peer challenges are improvement focused; it is important to stress that this was not an inspection. The process is not designed to provide an in-depth or technical assessment of plans and proposals. The peer team used their experience and knowledge of local government to reflect on the information presented to them by people they met, things they saw and material that they read.

The peer team prepared by reviewing a range of documents and information in order to ensure they were familiar with the council and the challenges it is facing. This included a position statement prepared by the council in advance of the peer team's time on site. This provided a clear steer to the peer team on the local context at New Forest District Council and what the peer team should focus on. It also included a comprehensive LGA Finance briefing (prepared using public reports from the council's website) and a LGA performance report outlining benchmarking data for the council across a range of metrics. The latter was produced using the LGA's local area benchmarking tool called LG Inform.

The peer team then spent three days onsite at New Forest District Council, during which they:

- Gathered evidence, information, and views from more than 40 meetings, in

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addition to further research and reading.

- Spoke to more than 130 people including a range of council staff together with members and external stakeholders.

This report provides a summary of the peer team's findings. In presenting feedback, they have done so as fellow local government officers and members.

5. Feedback

5.1 Local priorities and outcomes

In 2024, the Council launched its new [Corporate Plan 2024 to 2028](#), setting out clear ambitions for the district, with strategic priorities focusing on People, Place and Prosperity. The peer team consistently heard that the development of the corporate plan involved comprehensive and meaningful engagement from staff, members and external partners.

The Council has made good progress on a number of its key priorities, including delivery of new affordable homes and implementation of its Waste Strategy 2022 – 2027. Whilst recognising that the Council has an ambitious de-carbonisation approach, aiming to reduce carbon emissions of council owned homes to net zero by 2050 and to reduce carbon emissions of the housing operational services, the peer team encourages the Council to develop an action plan with milestone targets demonstrating how it will deliver these ambitions.

Communication of the Council's priorities to staff, members and stakeholders is key to ensure that they understand their role in supporting its objectives. It is also important to be clear to residents about what the Council can and cannot deliver, and by when. Furthermore, the Council may wish to explore ways to make the delivery of its priorities more visible, such as through internal and external communication channels. A clearer narrative on priorities will better help staff, local people and partners understand what the priorities, why they are needed and when they will be delivered.

Although the corporate plan sets out ambitions, it was clear to the peer team that not all staff understood their role in delivering it, as well as feedback that there was a

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large number of priorities. The Council may therefore wish to explore ways to provide clarity on the priorities, outlining when priorities will be achieved over the short, medium and longer term, as well as ensuring there is a 'Golden Thread' from the corporate plan down to staff.

The corporate plan provided an opportunity for the Council to review its existing approach to performance management. It subsequently put in place arrangements to monitor performance against the strategic priorities outlined in the corporate plan. The Council's new performance management framework takes the commitments outlined in the corporate plan, works with the transformation programme, and builds continuous improvement opportunities and learning throughout. The corporate plan includes a list of 48 key performance indicators (KPIs). The development of corporate KPIs has been rigorous with detailed descriptions and data collection methodology assigned to each measure within a comprehensive definitions handbook. Performance against these KPIs is monitored and will be published via a corporate performance dashboard.

The peer team saw visible evidence of the Council engaging with its residents, demonstrating that it continues to incorporate community engagement into service development and service provision. For example, the Tenant Involvement Group meets regularly and is used as a forum to engage and discuss ideas for future service delivery initiatives, with tenants reporting that they felt more listened to and respected. Community forums have been established covering cost of living, emergency planning and resilience. These forums invite town and parish councils, councillors, partners, emergency planning responders, local organisations, and representatives of the council to hear presentations from key speakers. These approaches demonstrate how the Council can continue to achieve community-driven solutions.

The peer team observed that community groups feel valued, with the annual community grants process seeing 17 awards totalling £135,000 in revenue support and £96,040 in 12 capital awards for 2024/25. The peer team welcomed that the grants in 2025/2026 will be closely aligned to the corporate plan objectives.

The Council has driven forward efforts to improve the equality, diversity and inclusivity (EDI). This includes establishing the EDI staff group in July 2023, the launch of the launch of the LGBT+ employee-led network in June 2024, and the chief executive's discussions with different faith groups within the Council's workforce. The peer team commends the efforts to date and encourages the Council to build on this progress. The Council may wish to ask itself whether EDI features adequately in terms of service planning and delivery; whether there is appetite from other protected groups to establish staff networks; and whether EDI is being considered early enough in the policy development cycle so changes can be made.

5.1.1 Performance

The Council's approach to business planning and performance management is relatively new, with a recently approved performance framework. The corporate plan includes a list of 48 key performance indicators (KPIs). Performance against these KPIs is monitored and is published via a corporate performance dashboard. As of August 2024, the 48 KPIs on or above target has been raised to 84%.

The Council uses a resident's survey to capture a range of data. The most recent [resident's survey](#) (September – November 2022) engaged 760 residents across the district. The results are used to inform decision-making and the development of priorities. The survey showed positive results, for example 93% of respondents feel satisfied with the area as a place to live, and 78% of respondents feel satisfied with the way the Council runs things.

The Council's [LG Inform Headline Report](#) compares council performance to its Chartered Institute of Public Finance and Accountancy (CIPFA) nearest neighbours. These show how the Council performs strongly in some areas, for example housing. When compared to other councils in the CIPFA nearest neighbours group the Council has the shortest amount of time taken to process housing benefit new claims at four days (average is 10 days), and below average number of total households on the housing waiting list at 1,876 (against an average of 2,687). It does, however, have the most number of households living in temporary accommodation per 1,000 households at 4.08 (average is 1.25) The peer team found that in housing, the Council showed a willingness to review their processes and improve performance

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monitoring.

The number of affordable homes delivered (130) in 2023/24 is below the benchmarking group average of 228. Despite spending the least amount in the benchmarking group of total revenue on planning and development services per head of population at £27.13 (against an average of £54.60), the Council performs well with 100 per cent of major planning applications decided on time and 95 per cent of other planning applications decided on time. Minor applications are at 86 per cent, which is just below the average of 92 per cent. In relation to this, the peer team found that local developers did report that they would like to see improvements in the consistent application of planning policy, and standardisation of Section 106 planning agreements to facilitate faster conclusion of planning permissions.

On waste, LG Inform performance data suggests that there is room for improvement. When compared to the benchmarking group, the Council has the lowest percentage of household waste sent for reuse, recycling and composting at 34 per cent (well below the average of 46.38 per cent); and its amount of residual household waste per household at 457.40kg is higher than the average of 396.2kg. The Council is confident that fundamental service changes in this area supported by a new depot will improve this performance over the coming years.

5.2 Organisational and place leadership

The peer team heard consistent and positive feedback on how the Leader and chief executive are highly respected, engaging and collaborative, both inside the Council and by external partners across the Hampshire region.

After a long period of continuity at the helm of the organisation, there were changes of leadership with the new chief executive joining in December 2021, and the Leader of the Council taking up their role in November 2022. Both were described as instrumental in improving the visibility and credibility of the Council on the regional stage, both at the political and officer level. The peer team heard how the Leader is described as 'open and a key figure in the culture of change', and the chief executive as a 'breath of fresh air'.

Following the appointment of the chief executive, a new model of leadership was

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implemented, moving from a four executive head model to three new strategic director roles. Its senior officer leadership team, known as the Executive Management Team (EMT), consists of the chief executive and three strategic directors. EMT meets twice a month with the monitoring officer and democratic services manager also attending. The EMT works well together and brings together valuable experience from working in the Council as well as from other local authorities but could be more joined up on their approach to transformation. EMT may wish to build on the leadership development work it has already undertaken and consider development days to further strengthen working relationships.

Below the EMT, the Senior Leadership Team (SLT) brings together senior managers and meets monthly. The peer team found that the SLT is highly engaged and proactively supportive of change. The Council may wish to consider clarifying the membership of the SLT and their corporate role; ensuring that SLT membership consistently cascade information to the wider staff community will be important.

Internally, both the Leader and the chief executive are accessible to staff. The employee forum meets approximately four times a year and is attended by both the chief executive and the Leader, with representatives from each service area who can raise issues and cascade information back to their teams. The chief executive holds regular staff briefings three or four times a year, both in person and virtually. At these briefings corporate updates are provided and staff are given a chance to ask questions. The staff networks also appreciate their good access to the chief executive. This accessibility reinforces the clear value-led commitment that staff at all levels have to the Council and residents.

Externally, the Council listens to local people, residents and businesses and engages in a meaningful way, for example through the Resident's Insight Survey as previously mentioned, the Tenants Involvement Group (see Housing section 5.6) and Town and Parish Councils. Whilst acknowledging the existing partnership with the Town Parish Councils is productive, the peer team heard of the Town and Parish Councils' enthusiasm to further collaborate as partners and to develop a more meaningful relationship regarding budget for them to deliver services. The Council may therefore wish to consider this in more detail. The Council works effectively in partnership with community groups who are seen as respected and their relationship with the Council

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is strong.

The peer team heard that the Council used to be very inward looking, but now embodies strong partnership working and has an effective convening role with a range of partners. There was wholeheartedly positive feedback from neighbouring authorities, business partners, public sector partners and other stakeholders. The peer team heard how the Council is now seen as open and willing to collaborate.

The partnership with the New Forest National Park Authority (NFNPA) is particularly well-established and mature. The NFNPA is the planning authority for the specific area and there are several service level agreements in place, covering things such as HR, finance, IT and technical professional services. The Council is encouraged to maintain its positive relationship with the NFNPA and harness any further opportunities, such as future accommodation and joint working on climate action and tourism.

Partnerships with other public sectors partners are also strong. On facilitating greater local involvement in the development of cultural activities, the Council has worked effectively with Arts Council England. A strategy is currently being developed, and the Council has established a strategic working group, which includes the NFNPA, Arts Council England, the NHS, the Hampshire Cultural Trust as well as other partners.

The Council has proactively built effective relationships with business partners and is an active player in these networks. The Leader sits on the Hampshire Prosperity Partnership Leaders Board, and from this District representatives attend the Hampshire Prosperity Board, which replaced the previous Local Enterprise Partnerships covering Hampshire.

The Council is an active player in the development and delivery of the Solent Freeport, with the Leader on the Solent Freeport Board. The Council established the Waterside Steering Group and plays a crucial role in facilitating joint working across partners and delivering work on the Freeport priorities. The peer team encourages the Council to maintain its efforts to date and maximise the opportunities within the Freeport, such as wider NFDC representation in sub-regional groups.

The Council also partners with the voluntary sector, particularly on supporting

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vulnerable households across New Forest, and chairs a New Forest Partnership Meeting which brings together multiple organisations to share information and work on specific projects, as well as signposting support. The Council works collaboratively with FareShare, local foodbanks, and partners to support the weekly food larders and community hubs as part of a cost-of-living steering group. The peer team encourages the Council to further harness the voluntary sector in New Forest to enhance and improve service delivery.

5.3 Governance and culture

The Council's governance and decision-making processes are strengthened by positive and respectful relationships between officers at all levels and the Cabinet, with the Leader's consensual style recognised and all political groups reporting good access to the chief executive.

The peer team consistently found that member and officer roles and responsibilities are well understood, with relationships described as trusting, constructive and collaborative. Collaborative working, particularly between senior officers and the Cabinet, has created a supportive culture.

The Council has improved its support to members, particularly via the revamped member induction programme in 2023, which included improved IT support, a new members' handbook, and a dedicated SharePoint site with resources uploaded. The peer team heard the induction programme has been well received and the regular all member briefings are welcomed.

Whilst the member induction programme is effective, the Council should ensure that the ongoing member development provision is robust. The peer team encourages senior members to be more assertive in setting and steering the priorities of the Council, for example in developing their own agendas and encouraging recommendations for Cabinet committee meetings.

To ensure that New Forest District Council is a diverse and representative local council, it is vital that councillors from all backgrounds and experiences reflect the New Forest communities they serve. The peer team encourages the Council to continue its efforts to recruit more diverse people to consider standing to be local

councillors. The LGA can provide support and information on this.

The Council revised its Overview and Scrutiny arrangements in May 2023, to coincide with the implementation of an electoral review and the reduction in the number of district councillors from 60 to 48. There are now three Overview and Scrutiny panels: Housing and Communities; Place and Sustainability; and Resources and Transformation. There is a clear appetite from members and officers to learn from best practice to provide more effective scrutiny. The Council is therefore encouraged to consider ways to strengthen and develop its Overview and Scrutiny function. This could include opposition-led scrutiny, as well as utilising LGA resources to learn from best practice and apply it in the New Forest.

There is evidence of cross-party working, with support across all political groups on the Council's transformation ambitions. Furthermore, the Council set up several task and finish groups with wide political representation to undertake reviews on areas such as health and leisure and sustainable waste, amongst others. The Council may wish to explore further opportunities for cross-party working to deepen political commitment to achieving the Council's goals.

One of the key priorities for the Council is to be an employer of choice, with a well-supported and dedicated workforce. Staff are New Forest District Council's greatest asset. They are passionate, enthusiastic and committed to the direction the Council is heading in. It was very clear to the peer team that the culture of the Council has improved, with a notable shift away from being siloed and inwardly facing to more collaborative and supportive. The Monthly Meet, launched in 2023, has played a key role in this shift. It provides an opportunity for staff to better understand other services and learn more about the work the Council does. The peer team also observed the Council's improved relations with its Trade Unions.

The annual staff survey gives employees a voice to express their opinions and is a useful way to gather feedback to identify areas for improvement. Although only 57 per cent of staff responded to the 2024 staff survey, this was an increase of 16 per cent on the previous survey. Overall, 76 per cent of respondents would recommend the Council as a place to work. The Council's supportive culture was recognised, with 84 per cent of respondents agreeing that team members help and support each

other. The peer team did hear about some scepticism on the anonymity of the staff survey so the Council may wish to reassure staff about this.

To shape the culture of the Council four values, known as LEAF, were established: Learning, Empathy, Ambition and Fairness. Whilst staff clearly accept the four LEAF values, many staff felt 'Learning' and 'Fairness' were not consistently applied across the organisation. In particular, there appears to be inconsistency on communications, with staff at the depot not always receiving key messages at the same time when it is cascaded to all staff.

The Council has historically been a risk averse organisation, but with robust risk management arrangements in place it can become bolder and braver with its decisions. It was clear to the peer team that members and the Senior Leadership Group are committed to effective risk management as they have led from the front in driving forward improvements to the council's risk management processes. The Audit Committee considers risk management and operates effectively, and the Annual Governance Statement tracks actions to completion.

Strategic risk management is embedded into service plans, with the service plans informing the Strategic Risk Register. In a tangible sign of good practice, the Council's Strategic Risk Register is published on the website, updated regularly, and kept under review. The Council could use the audit planning cycle for 2025/26 to ensure there is a 'Golden Thread' from the Strategic Risk Register through to individual Service Risk Registers.

In their last formal report covering 2021/22, no issues in relation to value for money were raised by the Council's external auditors. Although issues were raised over the valuation of both investment and leisure properties, this was due to differences of view on the methodology.

Like many other local authorities, the Council received a disclaimed opinion on its 2022/23 accounts. Draft accounts for 2023/24 have been published with no significant risks identified. The Council is hopeful that its auditors will complete the audit of the 2023/24 accounts before the February 2025 deadline.

5.4 Financial planning and management

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The Council is in a solid financial position because of a prudent approach to financial stability and proactive financial management over many years. Indeed, being financially responsible is one of the key strategic priorities of the Council's corporate plan.

The Council's Medium Term Financial Plan (MTFP) covers the period up to 2028/29. The overall forecast deficit taking into the account the various funding assumptions and budget movements totals £466,000 for 2025/26, increasing to a cumulative £2.693m by 2028/29. With the General Fund budget set for 2024/25 at £24.536m, the deficit represents a gap equivalent to 10% by the end of the MTFP period.

The budget gap for 2025/2026 is primarily related to the additional costs of transitioning to the new waste service during 2025/2026, with an expectation of new burdens funding from April 2026. The larger gap from 2027/2028 is an assumption of a business rate reset, tied in with the Fair Funding Review.

To address the forecast deficit to 2028/29, the Council is undertaking an organisation wide transformation programme. The MTFP identified a targeted saving of £1.75m from the transformation programme.

There is a risk that the scope of the transformation programmes widens too far, and the Council wants to do too much at the same time; the peer team recommends that the scope of the transformation programme remains focused to ensure that officer capacity is not stretched and that the timetable and sequencing of the transformation programme is clear to all staff.

The Council's unearmarked reserves balance has remained constant at £3m since 2017. Whilst the level of the Council's reserves relative to spend is not as high as some of its neighbours, they are sufficient for the authority to smooth changes to income in the medium-term. The Council has been able to add to reserves largely as a result of additional interest income.

The Council has well-established and good financial monitoring systems in place. The financial position is reported on quarterly as part of the performance management framework and Cabinet members are confident in the monitoring process. To enhance reporting, the Council could consider formal corporate processes for monthly reporting.

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The peer team recognises the work done to date to make the Council more commercially aware, with ownership of around £30m of commercial property that is all located in the district, and the plans to improve the utilisation of office accommodation at Appletree Court to generate income. However, the peer team felt that much more can be done to comprehensively understand the Council's physical assets, their liabilities, and future commercial opportunities. Assets across the New Forest could include things such as car parks, public toilets, Tide Mill, and the waste depot site. Once the mapping has been complete, a strategy could be developed to deal with the assets as part of a coherent corporate asset management appraisal system. This work would help the Council consider opportunities to maximise its income, thereby further supporting its ambitions to be financially responsible.

The Council's transformation savings targets and its position on assets will need to be revisited in light of the Government's announcements on local government reorganisation.

5.5 Capacity for improvement

The delivery of the Council's transformation programme, Future New Forest, is significant in helping the Council achieve financial sustainability, deliver services effectively, and to continually improve.

The peer team observed that the transformation programme is purpose led and has a solid evidence base. There is clear recognition of the Council's starting point and progress has already been achieved behind the scenes, but that the level of modernisation needed to deliver transformation is challenging.

Leadership of the transformation programme is strong, with commitment at all management levels to deliver it. The peer team observed that increased visibility of EMT's collective ownership of the transformation programme could strengthen the delivery of the programme.

Staff at all levels are passionate, committed, and believe in the need for change – they want to play their part in delivering the transformation programme. Despite this, adequate resourcing of the transformation programme is fundamental for its success. The peer team recommends that officer capacity is constantly reviewed to ensure

that staff are not just delivering business as usual but can deliver transformation priorities too. Giving staff permission to say no may enable this. The peer team also recognises that progress has been made on reducing silo-working, which could further increase staff capacity. The Council may look to build on this and go further by combining specialisms, such as communications, consultation and business intelligence.

Keeping up the morale of staff is equally important, especially during periods of significant change. The peer team observed that several internal policies and practices are not being consistently applied across the organisation, including staff, induction, flexible working, Job Evaluation, Sickness Policy, job titles and job descriptions. This has led to staff dissatisfaction and frustration, particularly in the areas of the Council who have felt that they are being treated unfairly. Addressing these inconsistencies may ensure that support for the transformation programme is not diminished.

One of the four themes of the transformation programme is customer and digital services. Standardising customer focuses processes and technology across all services will rely heavily on digital platforms. It will therefore be essential that staff have the required skills and that customers are able to use it.

The peer team heard that the Council's IT officers are well thought of, and they provide helpful support. However, there is inconsistent use of IT across teams within the Council, for example how documents are stored, IT training and the use of SharePoint. There are therefore opportunities to create more effective and efficient working practices. There could be an opportunity to establish expectations for IT use across the authority.

The Council is currently considering ways to improve the underutilised office accommodation at Appletree Court. This presents an opportunity to reexamine the layout of its office space and could result in potentially releasing some office space for third party tenants, providing a commercial opportunity for generating income. The peer team encourages the Council to engage staff sufficiently in these plans to ensure that their needs are met.

A consistent approach to IT use and the adoption of shared practices would benefit

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the organisation and improve efficiency. The Council's move to hybrid working thereby demonstrates the importance of developing capabilities in Microsoft Teams to enable effective working.

As previously mentioned, the Council may wish to explore how internal and external communication channels can increase the visible delivery of its priorities. The Council will be building on solid foundations with communications colleagues already working effectively with teams to develop messaging on service delivery and key projects. A corporate-wide communications strategy could help prioritise key campaigns and messaging to drive behaviour change, such as implementation of the waste strategy. Furthermore, given communications is at the heart of all Council activity and success, the peer team encourages the Council to better celebrate its achievements, no matter how big or small they are. On the transformation programme, quick wins could be regularly highlighted to build momentum and communications to residents could explain how the transformation programme will benefit them.

5.6 Housing

Given meeting housing needs is one of the Council's top priorities in its corporate plan, the peer team were asked to consider it as an additional area of focus. Overall, the peer team found that Council has an ambitious and creative development and acquisition programme focused on local needs.

There is strong political support for the Council's housing priorities. The Peer Team found that the Council's portfolio holder, who is also the Deputy Leader, is committed and has a strong working relationship with the Housing Team and the Tenants Group. The Housing and Communities Overview and Scrutiny Panel operates collaboratively and provides effective oversight.

The Council's commitment to delivering 600 new affordable homes by 2026 is ambitious, but challenges remain. Given the Council's emphasis on housing delivery, housing developers were keen to see greater articulation of housing needs to overcome localised opposition to housebuilding. The Council may therefore wish to establish a narrative to better articulate local housing requirements to overcome public and political opposition.

The Council cannot achieve its housing ambitions on its own; it will need to work effectively with private and public sector partners. Peers were impressed by the approach taken to affordable housing delivery which has embraced multiple approaches to increasing availability, including partnerships with housing associations, acquisitions from the open market, S106 acquisitions and direct delivery.

The peer team also welcomed the Council's emerging relationships with developers and private sector landlords, and noted the Council's constructive relationship with Hampshire County Council on helping people live independently at home.

The Council owns around 5,000 homes and has undertaken sufficient preparation in advance of the new social housing regulatory requirements, including staff training and tenant engagement. The Tenant Involvement Group set out that attitudes to tenants had shifted recently to a more positive and equal relationship. The group meets regularly and is a forum to discuss ideas around priorities and service delivery. Further involvement of tenants in policy development, scrutiny and training could strengthen their voice within the organisation, putting the Council in a stronger position for regulatory inspection.

The Council is rightly proud that 81% of respondents are satisfied overall with their council managed property. However, only 29.1% of tenants are satisfied with the Council's approach to complaint management and the Council recognises this is an area to improve upon. The existing tenant engagement channels provides an opportunity to grow their involvement and influence, and work collaboratively to resolve issues.

In February 2024, Cabinet agreed to undertake a full review of the Local Plan. It is worth noting that any developments on local government reorganisation in Hampshire may impact Local Plan activity. The peer team observed that some aspects of the planning process are delaying development, although this is not a problem just for New Forest. The Council will therefore need to be mindful of future challenges and opportunities for its development programme.

On homelessness, the Council has an effective operational response to homelessness pressures and works collaboratively with local charities and groups to

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tackle rough sleeping, for example with The Crossings charity on housing register support in the Hythe area. Furthermore, there has been a reduction in rough sleeping over the past three years, which is a significant achievement.

The Council also partners with the New Forest Disability Information Service to provide support for vulnerable residents who have been discharged from hospital to help them live independent lives at home. It also works effectively with Hampshire County Council on adaptations and specialist accommodation needs.

6. Next steps

It is recognised that senior political and managerial leadership will want to consider, discuss and reflect on these findings. It has already been acknowledged in this report that the peer review took place before the announcements on devolution by the Government. It is important to recognise that while addressing key priorities, the Council will need to divert officer capacity to support potential local government reorganisation planning.

The LGA will continue to provide on-going support to the council. Following publication of CPC report you need to produce and publish an Action Plan within five months of the time on site. As part of the CPC, the council are also required to have a progress review and publish the findings from this within twelve months of the CPC. The LGA will also publish the progress review report on their website.

The progress review will provide space for a council's senior leadership to report to peers on the progress made against each of the CPC's recommendations, discuss early impact or learning and receive feedback on the implementation of the CPC action plan. The progress review will usually be delivered on-site over one day.

The date for the progress review at New Forest District Council is October 2025.

In the meantime, Will Brooks, Principal Adviser for the South East, is the main contact between your authority and the Local Government Association. As outlined above, Will is available to discuss any further support the council requires.

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Action plan

Corporate peer challenge 2024

March 2025

Introduction

Recommendations from the CPC team

Following the completion of the corporate peer challenge in December 2024 a feedback report has been published by the LGA including a list of recommendations for consideration. The report also included key observations and comments from the peer team based upon their findings from the peer challenge.

We are required to publish an action plan within five months of the completion of the peer challenge. This document outlines associated actions, timelines, and tracks progress towards implementation of the recommendations. Included within this action plan are additional actions which arise from the peer teams observations and commentary.

It is acknowledged that the peer challenge took place prior to the announcements on devolution by the Government, which may impact the resources required to address key priorities, as officers' capacity will be diverted to support reorganisation planning.

A progress review by the LGA will be scheduled to allow feedback and report progress made against each of the recommendations and discuss impact and learning. A progress report will then be published by the LGA.

Recommendations

The following are the 10 recommendations from the corporate peer challenge feedback report.

No	Recommendation	Associated actions		Timescales	Owner
1	Clarify priorities and timelines for delivery	1.1	Revisit priorities and categorise considering LGR (continue, review and pause)	Jan 2025 <i>Delivered</i>	Alan Bethune
		1.2	Seek formal approval for revised priority list, following informal consultation with the Leader and Cabinet members	March/April 2025 <i>Delivered</i>	Alan Bethune
		1.3	Reallocate resources based on revised priorities in the 2025/26 budget.	March 2025 <i>Delivered</i>	Alan Bethune
2	Create an overarching corporate narrative and communicate proactively with staff, members and local people	2.1	Develop concise view (graphic/one pager) of priorities to support internal & external comms	April 2025	Kate Ryan
		2.2	Develop narrative to support revised priorities (aligned to LGR report)	May 2025	Kate Ryan/Sara Hamilton
		2.3	Prioritise communications messaging and resource aligned to corporate plan, agreeing gold, silver and bronze focus	June 2025	Kate Ryan/Sara Hamilton
		2.4	Celebrate successes linked to revised priorities to ensure continuity and reinforcement of narrative (link to recommendation #10) Annual Report (July 2025)	Ongoing	Leadership team/Sara Hamilton

			End of year look back (December 2025)		
		2.5	Support staff understanding of their role in delivering priorities through clear links from corporate plan to individual performance through regular development conversations. Review of performance reviews and one to ones being undertaken within People Strategy Roll out	October 2025	Alan Bethune/Rebecca Drummond/ Leadership team
3	Design and deliver a robust member and senior officer development programme	3.1	Member training opportunities, including self-serve, Member briefings and LGA sessions will be themed to support Members' understanding of the different roles of an elected Member and how training can support their development. This will take account of Local Government Reorganisation implications. Training will be prioritised based on the feedback received from a recent Member Development survey, which includes strengthening Overview and Scrutiny (See 4 below).	May 2025	Tanya Coulter / Matt Wisdom
		3.2	Support members in their roles across key programme governance including waste, transformation and LGR	Ongoing	Tanya Coulter / Matt Wisdom
		3.3	Build on the informal EMT/Leader meetings to set up dedicated EMT/Cabinet development sessions	Ongoing	Kate Ryan

		3.4	Continue leadership and management development programmes with further opportunities linked to the behaviours framework and development of leadership skills to support LGR	Ongoing	Alan Bethune/ Rebecca Drummond
4	Consider ways to strengthen your Overview and Scrutiny function	4.1	Strategic Director linked to each O&S panel to provide direct support to panel members	January 2025 <i>Delivered</i>	Strategic Director Lead/Matt Wisdom
		4.2	Agenda planning and topic prioritisation meetings take place with the lead SD, Chairman and Vice-Chairman	January 2025 <i>Delivered</i>	Strategic Director Lead/Matt Wisdom
		4.3	Specific topic briefings to be held i.e. Housing Regulation, to develop member knowledge and support scrutiny role	Housing – March 2025 <i>Delivered</i>	Strategic Director Lead / Tanya Coulter/Matt Wisdom
		4.4	Develop an 'essential' training package for all councillors that serve on Overview and Scrutiny Panels, comprising delivered and self serve training, to include:- <ul style="list-style-type: none"> • O&S Chairman training • Questioning skills training • Scrutiny essentials • LGA resources 	May 2025	Tanya Coulter / Matt Wisdom
5	Ensure there is collective ownership of the transformation programme by	5.1	Governance structure supports reporting and discussion at directorate level with escalation to Transformation Board	March 2025 <i>Delivered</i>	Alan Bethune/Rebecca Drummond

	the Executive Management Team	5.2	Further embed governance arrangements, including reporting of issues and decisions that conflict with agreed strategic direction	March 2025 <i>Delivered</i>	Alan Bethune/Rebecca Drummond
		5.3	Revise business case considering LGR and ensure new focus is well communicated and anchored in governance reporting	June 2025	Alan Bethune/Rebecca Drummond
		5.4	Consider and implement opportunities to improve EMT visible leadership of change initiatives	September 2025	Alan Bethune/Rebecca Drummond
6	Apply internal policies and practices consistently across the Council	6.1	Investment in additional OD and Employee Engagement resources agreed	Feb 2025 <i>Delivered</i>	Alan Bethune/Rebecca Drummond
		6.2	Induction framework being revisited to ensure consistency, including 'induction essentials' video for new starters and enhanced guidance for managers	May 2025	Alan Bethune/Rebecca Drummond
		6.3	Behaviours framework being developed to ensure consistency	July 2025	Alan Bethune/Rebecca Drummond
		6.4	Different ways to communicate key messages and cascade information to operational staff will be implemented including briefing notes and visual updates where appropriate	April 2025	Strategic Directors/Rebecca Drummond
		6.5	Review local arrangements to ensure policies and practices consistently applied and create baseline data to monitor	September 2025	Alan Bethune/Rebecca Drummond

			improvements. Linked to People Strategy delivery		
7	Develop an Assets Strategy and Action Plan	7.1	Initial engagement with Overview and Scrutiny panel to test direction of travel of emerging strategy	March 2025 <i>Delivered</i>	Alan Bethune
		7.2	Adoption of Asset Strategy and Action Plan	July 2025	Alan Bethune
		7.3	Commence discussions with Town and Parish Council and other partners	July 2025	Alan Bethune
8	Demonstrate further commitment to carbon reduction with a clear action plan	8.1	Continue to decarbonise the council's housing stock and housing of all tenures in line with the Greener Housing Strategy	Council housing stock EPC 'C' or higher by 2030	Richard Knott/Sophie Tuffin
		8.2	Ensure low carbon development through alignment with the Planning for Climate Change SPD and wider Local Plan Review	Ongoing	James Carpenter/Tim Guymer
		8.3	Refresh of the Climate Change and Nature Emergency Action Plan to ensure ambitious carbon reduction, climate adaptation and nature recovery outcomes	March 2026	James Carpenter/Roxanne King
9	Continue the good practice in housing and consider applying successful approaches to the wider organisation	9.1	Establish a list of key good practice items and outcomes	October 2025	Richard Knott/Paul Thomas
		9.2	Knowledge transfer opportunities with wider SLT	October 2025	Richard Knott/Paul Thomas
		9.3	Use the topic based 'Monthly Meet' staff engagement forum as a learning opportunity to share examples of Housing best practice and improvement initiatives	September 2025	Richard Knott/Paul Thomas

10	Remember to celebrate your achievements no matter how small or big they are	10.1	Prioritise and develop an approach and multi-level offer for all staff and implement focussed activity for operational services across Place and Housing	August 2025	Kate Ryan/EMT
		10.2	Build a values based, equitable recognition element into the implementation of the Behavioural framework	October 2025	EMT/Leadership Team
		10.3	Leadership team development session on rewards and recognition, to shape and embed this across the organisation.	August 2025	EMT/Leadership Team
		10.4	Build in time to celebrate success into all staff, directorate and team sessions.	Ongoing	EMT/Leadership Team

Additional actions

The following are additional actions and considerations which arose from the peer team's commentary and observations.

No.	Observation	Actions	Timescales	Owner
1	Service planning and delivery to proactively consider opportunities for enhancing inclusivity	<ul style="list-style-type: none"> • Include equality and inclusivity considerations into service planning template and associated guidance • Consider knowledge gaps and way to create greater understanding and awareness of equality and inclusion across all staff groups in support of improved diversity and inclusion in the services we provide • Link to People Strategy and the creation and development of staff forums 	August 2025	Alan Bethune / Rebecca Drummond
2	Policy development to include consideration of equality, diversity and inclusivity impacts at the outset	<ul style="list-style-type: none"> • Leadership team development session to explore the LG Equality Framework as it relates to service delivery • EMT to ensure that where relevant policy development includes an equality impact assessment 	October 2025 Ongoing	Kate Ryan Strategic Directors
3	Development Management – Standardisation of Section 106 planning agreements to facilitate faster conclusion of planning permission.	<ul style="list-style-type: none"> • Establish a Developer Forum to explore the issues raised with the service leads with an initial meeting by the summer. 	July 2025	James Carpenter
4	SLT – Clarify corporate role of wider leadership team members and ensure	<ul style="list-style-type: none"> • Actions to be summarised for each agenda item, including for 	May 2025	Kate Ryan

		of Disability awareness programmes.		
8	Continue efforts to recruit more diverse people to consider standing to be a local councillor	<ul style="list-style-type: none"> Political group leaders to consider how their work recruiting, developing and selecting candidates to stand for future elections can improve wider representation of the local community. Review engagement opportunities ahead of future Town & parish and District elections 	April 2026 TBC	Kate Ryan/ Matt Wisdom
9	Establish expectations for consistent IT use across the authority, including how documents are stored, IT training and the use of SharePoint and M365 tools	<ul style="list-style-type: none"> Create plan to deliver 'Digital Skills for all' to facilitate learning, technology adoption and best practice usage. Continued training and knowledge sharing with the ICT service desk to then deliver consistent best practice and meaningful messaging to our staff. Creation of 3 new ICT best practice guides: <ul style="list-style-type: none"> "Where to start a digital conversation" "Where to save my files" "Best practice guide to using my SharePoint Team Site" 	August 2025	Alan Bethune/ Rebecca Drummond
10	Housing – Further involve tenants in policy development, scrutiny and training to strengthen their voice	<ul style="list-style-type: none"> Deliver actions in the Tenant Engagement Strategy. 	April 2026	Richard Knott

		<ul style="list-style-type: none"> • Establish a menu of engagement options and learning opportunities for staff • Increase participation across demographics and localities. • Complete the Tenant data survey and analyse results to create targeted approach 		
11	Establish a narrative to better articulate local housing requirements to overcome public and political resistance	<ul style="list-style-type: none"> • Progressing the Local Plan from current Reg 18 Issues and Options stage through to Reg 19 will allow wider views to be gathered • Undertaking a range of engagement activities both with the community/ Towns & Parishes and with elected members, through the Local Plan Member Working Group and more widely. • Undertake Green Belt review as part of the local plan evidence base to better understand capacity in the district, in line with the NPPF principles of “Grey Belt” • Partnership working across Hampshire, and with the National Park Authority on the special landscape constraints and designations that constrain growth in the district, to arrive at an appropriate housing number. • Specific work with officers planning committee members to 	April 2026	James Carpenter

		<p>understand and act upon the current and future implications of a lack of 5-year housing land supply, and the impacts of not meeting the NPPF Housing Delivery Test (application of a 20% buffer) on planning decision taking.</p>		
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Corporate plan priorities – key deliverables review

March 2025

Introduction

Local government reorganisation

The recent corporate peer challenge and the emerging local government reorganisation (LGR) discussions has prompted a review of the key deliverables in support of the Council's priorities to ensure our ambitions are balanced with our capacity and that our capacity is focussed on the right activities.


The Corporate Plan and Future New Forest remain the agreed policy frameworks and ongoing service delivery continues to be central to ensuring the needs of our residents are met.

This review enables a discussion to bring about more clarity on the delivery of priorities and associated timescales, to focus resources and consider the potential impacts of local government reorganisation.

Status

The delivery activities within each of the corporate plan themes have been initially assessed and categorised on the following basis:


.....

Continue  Rationale supports continuation based on impact and/or nearing completion

.....

Consider  Proportionate response with limited resources

.....

Stop  Timescales and capacity required suggest that activities should be paused





.....

New/LGR  New activities arising from LGR






People

Helping people in the greatest need and creating balanced, resilient and healthy communities who feel safe and supported with easy access to services.









Helping those in our communities with the greatest need

Delivery activity	
	Community forum
	Universal credit rollout
	Careline digitalisation
	Careline growth

Empowering our residents to live healthy, connected and fulfilling lives

Delivery activity	
	Cultural strategy
	CCTV expansion
	Community grants (annual)
	Cultural strategy (implementation)
	Development of new Health and wellbeing strategy
	Community strategy





Meeting housing needs




Delivery activity	
	Homelessness strategy
	Social Housing Decarbonisation fund bid wave 3
	Tenant satisfaction survey part 2
	Social Housing Regulation Act (Implementation)
	Private Sector Housing strategy review
	Affordable Housing Delivery action plan
	Development of new Empty homes strategy
	Housing strategy consultation/publish (aligned with local plan timescales)

Place

Delivering growth, opportunity and services that shape our place now and for future generations, within a unique environmental context, to ensure we remain a special place to live, work and visit.












Shaping our place now and for future generations

Delivery activity	
	Local Plan (issues and options)
	Dibden Bay planning response
	A326 upgrade
	Nationally significant infrastructure project - Fawley Pipeline

	Development Management Review
	NEW – Community infrastructure levy (CIL) Community
	NEW – CIL Strategic










*Planning performance agreement

Protecting our climate, coast and natural world

Delivery activity	
	Public space protection order (PSPO) Review
	Air quality strategy
	Emergency planning and business continuity review
	Christchurch Bay flood/coastal erosion risk management (FCERM) approval
	Hurst Spit to Lymington
	Climate and nature emergency strategy and action plan
	Air quality strategy (implementation)
	Fleet strategy
	Climate/Sustainability Impact Decision Tool Assessment
	Coastal destination strategy
	Coastal partnership model

Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way


Delivery activity

	Waste Strategy mobilisation and rollout
	Bartec in cab technology rollout
	Hardley depot move
	Marsh Lane depot essential works
	Ringwood depot expansion
	Review of commercial waste
	Simpler recycling legislation
	Open Spaces review
	Parking strategy

Prosperity

Promoting a strong local economy that delivers its inclusive aspirations through effective partnerships, attracting investment, and increasing skills and employment opportunities.


Maximising the benefits of inclusive economic growth and investment

Delivery activity	
	Economic strategy / prospectus

Supporting our high-quality business base and economic centres to thrive and grow

Delivery activity	
	Totton Masterplan

Championing skills and access to job opportunities


Delivery activity	
	Employment and skills strategy

Future New Forest








Putting our customers at the heart




Delivery activity	
	Resident insight (2025 survey)

Being an employer of choice







Delivery activity	
	People strategy

Being financially responsible








Delivery activity	
	Financial regulations update
	Strategic Asset review (inc. Lymington Town Hall, community assets)
	Strategic Asset implementation
	Appletree court (ATC) essential works project
	NFEC Future arrangements
	Claymeadow depot Future agreed
	Eling Tide Mill (urgent works/repairs)

	Eling Tide Mill (long-term asset strategy)
	ATC South Wing business case works
	NEW - Transformation business case revisit

Designing modern and innovative services

Delivery activity	
	Digital strategy (delivery)
	Digital Transformation: Customer platform
	Digital Transformation: Data platform
	Digital Transformation: Housing Maintenance
	Digital Transformation: Asset Management software
	Digital Transformation: Regulatory Services software

Other corporate activity

Delivery activity	
	Elections
	Scheme of Delegations update
	Business Planning Framework
	Member development (proportionate to LGR context)
	Corporate Dashboards
	Communications strategy (delivery as per service plan)
	NEW - Devolution / Local Government Reorganisation

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Resources and Transformation Overview and Scrutiny Panel

March 2025





Future New Forest

Transforming tomorrow, together

Resources and Transformation O&S Panel
20 March 2025



Future New Forest Updates :

- Programme update
- People strategy update
- Digital update- Future New Forest Projects
- Asset strategy update

Transformation Programme Update



- The Customer and Digital programme is moving at pace. Decision made at the Transformation Board to enter into a supplier discovery phase
- Detailed requirements workshops and process mapping of key processes commenced 10 March
- People Strategy full and abridged versions are complete and have been agreed through transformation governance framework
- Transformation Business Case re-work is in progress
- Corporate priorities for Future New Forest reviewed and agreed by EMT and Cabinet
- Microsoft Co- Pilot AI technology to be deployed to all staff at the end of March

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Transformation Digital Projects- Progress Update



- Customer First – progressing well with a discovery focus on processes to redesign, how technology can enable these and what our new customer platform could look like.
- Data Platform – understanding further the need for ‘good data’ across systems and what our approach to data could be (People, Process and Technology).
- All digital projects progressing well in terms of understanding the needs, exploring the technology and getting ready to procure.
- Transformation and ICT teams are collaborating well to provide a broad lens to projects.
- New Digital Strategy 2025-2028 drafted for consideration.





People Strategy: Progress update

- People strategy and delivery plan approved by EMT. Formal approval sought from HR Committee on 13 March, and then Cabinet in April.
- Recruitment for additional roles to support delivery plan underway.
- First workshops held with recruitment team to identify recruitment process improvements.
- Initial workshops on understanding and supporting others through change developed and delivered to change champions and leadership team.
- Draft behaviours framework being tested and further developed through change champion's network.
- Targeted training plan in development for loaders, drivers and supervisors in waste services and wider operational supervisor staff. Aim for delivery by early May: before, and in support of, waste service change in June.





Strategic Asset Management Plan (SAMP) 2025 -2028

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**Asset and
accommodation**



Strategic Anchors (The Five Pillars)

The Strategic Asset Management Plan will provide an overview of our land and property estate (excluding Housing). Working within our five pillar approach, we will focus areas for managing and developing the estate over the next three years.

“ *Effective management and ownership of a portfolio of assets, which facilitates the future needs of the council services and functions within our financial means; whilst maximising opportunities for our residents, visitors and businesses* ”





1. Digital Asset Management

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**Asset and
accommodation**



SAMP Objectives

- Create an effective digital asset management database enabling the capture of accurate management information, in support of ensuring statutory and regulatory compliance is upheld across the estate.
- Embed a culture that recognises that property assets are a key corporate resource, where informed decisions are made that are linked to corporate and service objectives that deliver good financial sustainability and service outcomes.

Delivery Mechanism

- A fit for purpose digital system containing up to date and accurate records “*A single version of the truth*”.
- Proactive monitoring and managing the condition and safe use of buildings to provide comprehensive assurance of compliance and health and safety.
- Oversight of suitable Key Performance Indicators.
- Working with Service Areas to understand their current and longer-term requirements.



2. Asset Optimisation in Support of Corporate Plan Priorities

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**Asset and
accommodation**



SAMP Objectives

- To optimise the estate to generate operating savings, ensure assets are fit for purpose, meet service operating and user needs, incorporate technological advances and minimise whole life building costs.
- To ensure ownership and occupation of assets is robustly challenged.

Delivery Mechanism

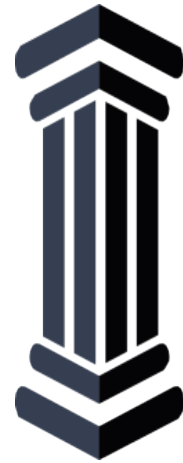
- Challenge the use of the assets through an Asset Challenge Framework.
- Rationalise and reduce the number of buildings and areas of land where possible and appropriate, considering potential long- and medium-term needs, and ensuring assets are held for a clear purpose and provide best value.
- Working with Services Areas in the development of their Service Plans to ensure consideration in relation to asset requirements.



3. Working with Partners and Communities to Promote Efficient and Effective Service Delivery



Asset and accommodation



SAMP Objectives

- To enable transfer of management / ownership of the asset where it can provide a benefit to service delivery and demonstrate longer term benefit.
- Maximise efficient use of our assets through collaborative working with partners.
- Improve efficient and effective asset use and value to the community.
- Maximise the use of government available grants.

Delivery Mechanism

- Agree and adopt Community Asset Transfer and Disposal Policies, identifying assets that local communities or not for profit organisations could be better positioned to deliver. eg.
 - Community Halls
 - Public Conveniences
 - Open Spaces
- Enhanced collaboration with partners, including our One Public Estate partners to identify innovation, efficiencies and maximise asset usage.



4. To Reduce the Environmental Impact of Council Assets

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**Asset and
accommodation**



SAMP Objectives

- Champion reduction in the Environmental impact of occupation, use, travel and waste.
- Protect our climate, coast and natural world.
- The council to promote the target for net zero carbon for the benefit of our residents.
- Identify areas of support or grants from external private or public sources.
- Eliminate or reduce the use of fossil fuel systems and seek to improve thermal efficiency across the estate.

Delivery Mechanism

- Ensuring our assets are appropriately located to serve the Service and community needs.
- Ensure new assets meet Climate Emergency pledges and reduce the consumption of embodied carbon in new build and refurbishment projects.
- Proactively monitor performance of the portfolio and identify efficiency opportunities.
- Explore the opportunities to use our land and buildings to generate renewable energy.



5. To Support Economic Growth, Regeneration and Prosperity



Asset and accommodation



SAMP Objectives

- Support our business base and economic centres to thrive and grow.
- Support economic growth and regeneration across NFDC.
- Revitalise town centres through /regeneration repurposing with a modern offering which fosters greater social interaction, community spirit, local identity and heritage.
- We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation.

Delivery Mechanism

- Acquire sites that meets our needs, invest wisely in our towns and communities, help drive sustainable growth and attract wider private sector investments.
- Dispose of assets that do not align to our requirements / priorities, are a liability, or will not generate a return on investment.



Thank you for your time



Resources and Transformation Panel
March 2025



ICT Annual Update
March 2025

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Resources and Transformation Overview and Scrutiny Panel



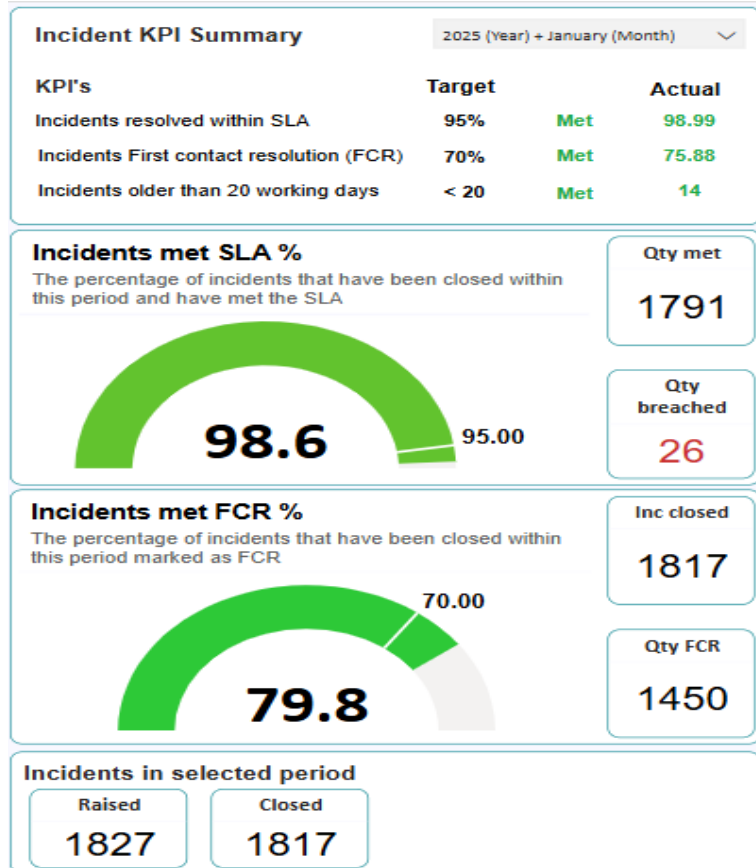
1. Annual update for ICT and digital strategy delivery.

ICT Operational – Performance

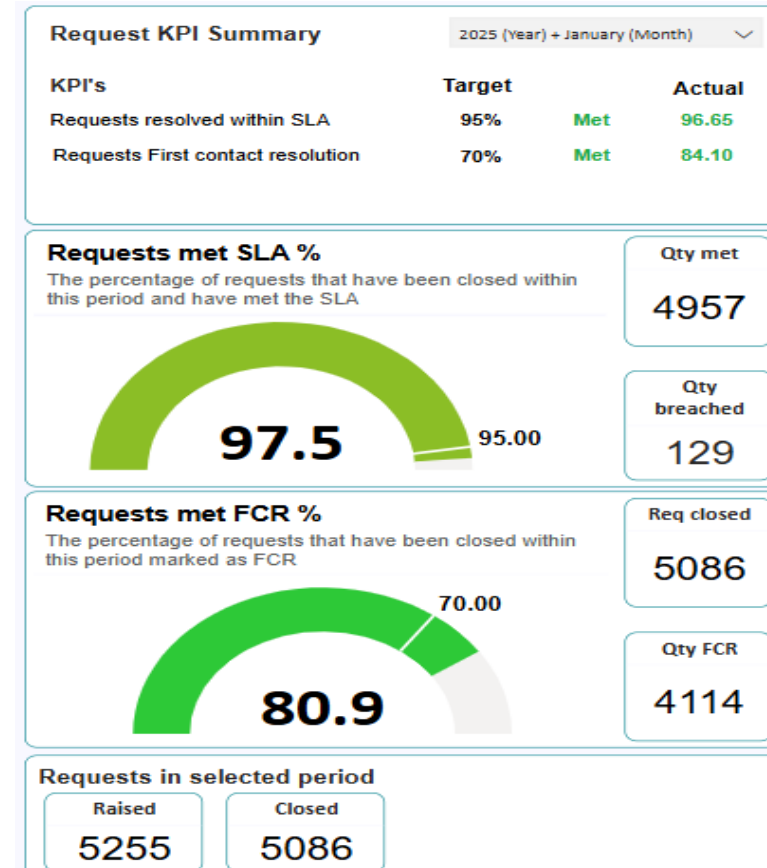
01/04/24 - 07/03/25



Incidents



Requests



ICT Operational – Cyber Security and Compliance



Cyber Security Statistics

- Internet traffic seen in the last 24 months: 132.62 TB
- Traffic grew 122% in last 24 months
- Malicious content: Total blocked for last 12 months: 14,948
- Phishing: Total blocked for the last 12 months: 979

Compliance

- Public Services Network (PSN) Code of Connection
- Cyber Essentials
- DWP Memorandum of Understanding

ICT Delivery - Financials



ICT PROJECTS (actuals to February 2025)	TOTAL PROJECT BUDGET £'000s	TOTAL PROJECT ACTUAL £'000s	FUTURE SPEND COMMITTED £'000s	CURRENT VARIATION £'000s	PROJECT STATUS
Software Apps Upgrade and Development	64	24	2	-38	Annual Budget
Azure Cloud Migration	258	216	0	-42	Project completed
Direct Debit Automation Project	30	24	0	-6	Project completed
Intranet Project	50	13	0	-37	Project completed
Learning Management System	20	35	0	15	Project completed
Replacement of Firewalls	60	89	0	29	Project completed
Analogue to Digital	38	8	2	-28	In Progress
Apps - Operations	360	201	122	-37	In Progress
Digital Skills for staff	50	0	0	-50	In Progress
Regulatory Services Project	420	318	0	-102	Project closed
Heycentric Implementation	50	23	24	-3	Under Review
IT Service Mangement Platform	40	0	0	-40	Under Review
	422	312	2	-108	

Transformation Project Budgets to commence in 2025/26					
Contact Centre Software	88				In Progress
Customer First Digital Project (CRM)	680				In Progress
Digital Data Platform and Reporting	180				In Progress
Digital Housing Maintenance System	290				In Progress
Locata Data Warehouse Reporting	7				In Progress
Regulatory Services Project (NEW)	666				In Progress
Revs and Bens NEC Customer Portal	74				In Progress
	2,447				

ICT Delivery – Benefits realisation



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Project Name	Benefit Highlights
Learning Management System	<ul style="list-style-type: none">• New LMS linked to the HR Hub• Improved reporting• New online training modules
Intranet	<ul style="list-style-type: none">• New modern intranet site• 2000 pages reduced to 200• Review and refresh of content• Consistent and accessible look and feel
Direct Debit Automation	<ul style="list-style-type: none">• Self serve direct debit sign up for residents• Sundry Income, Housing Benefits, Council Tax now online and automated• Reduced admin for staff• Circa 1,800 in online sign ups since late summer 2024
Azure Cloud Migration	<ul style="list-style-type: none">• Modern server infrastructure in the cloud• Reduced on site footprint supporting our climate• Modern features and security for our servers

ICT Delivery – Benefits realisation



Project Name	Benefit Highlights
Analogue to Digital	<ul style="list-style-type: none">• Supporting the nationwide analogue switch off• New internet connectivity to support frontline services
Hardley Depot ICT	<ul style="list-style-type: none">• Full ICT services at our new depot• High speed wi-fi connectivity
M365 Adoption	<ul style="list-style-type: none">• Teams chat part of the day to day• Teams Guest access available with other councils• SharePoint Team Sites for pages and files• Power BI for modern dashboards• Power Automate for process and task automation• Productivity apps like Planner
SharePoint Email Add In for Legal	<ul style="list-style-type: none">• Easy 'drag and drop' of legal case emails into SharePoint• Reduction in officer admin time for case management• 6-month benefit review planned
St George's Hall Internet	<ul style="list-style-type: none">• Broadband wi-fi internet at the hall for visitors to access

What's happening now

Delivery

- Deliver the ICT work programme and Digital Transformation projects
- Customer Digital Platform, Data Project, Housing Maintenance System, Regulatory Services system, Digital Skills for all, Asset management...

New Digital Strategy 2025-2028

Operations

- Maintain the availability, stability and security of our network and devices
- Windows 11
- Windows Server Upgrades
- Cyber Essentials



Recommendations



- The Resources and Transformation Overview and Scrutiny Panel are asked to note the contents of this update.
- Feedback and questions are welcomed by all panel members.

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Resources and Transformation Overview and Scrutiny Panel –

March 2025

Digital Strategy 2025-2028

Purpose	For review
Classification	Public
Executive Summary	<p>This report provides the council’s proposed digital strategy for 2025-2028.</p> <p>The current digital strategy expires in 2025 therefore it has been updated in line with the corporate suite of documents to ensure alignment with the Corporate Plan, Transformation Strategy and Customer Strategy.</p>
Recommendation(s)	<p>That the panel members provide feedback on:</p> <ol style="list-style-type: none"> 1. The Digital Strategy 2025-2028 included in Appendix 1 2. The proposed Cabinet recommendation as follows: <p>That Cabinet approve the Digital Strategy 2025-2028 and its adoption</p>
Reasons for recommendation(s)	<p>To support the delivery of the corporate plan, transformation strategy, customer strategy and people strategy.</p> <p>To support the strategic vision for digital at NFDC and best position it for local government reorganisation.</p>
Ward(s)	All
Portfolio Holder(s)	Councillor Jeremy Heron – Finance and Corporate

Strategic Director(s)	Alan Bethune – Strategic Director Corporate Resources and Transformation (Section 151 Officer)
Officer Contact	<p>Rich Bird Data, Development and Delivery Manager Rich.Bird@nfdc.gov.uk</p> <p>Kim Gray ICT Operations Manager Kim.Gray@nfdc.gov.uk</p> <p>Sponsored by:</p> <p>Alan Bethune Strategic Director Corporate Resources & Transformation Section 151 Officer alan.bethune@nfdc.gov.uk</p> <p>Rebecca Drummond Assistant Director - Transformation Rebecca.drummond@nfdc.gov.uk</p>

Introduction and background

1. The Digital Strategy 2025 – 2028 has been developed following the adoption of and in support of the Corporate Plan, Transformation Strategy and Customer Strategy. This inward facing strategy enables the implementation of these outwardly focused strategies by setting out focused digital principles and to leverage new modern technologies to support our residents, staff and members in our digital journey.
2. The proposed strategy will run from 2025-2028 with a mindful focus on activities and priorities in line with local government reorganisation (LGR).
3. The digital strategy enables the delivery of the six digital principles:

a. Principle 1 - Customer first, digital by design

Customer needs will be at the heart of the digital services that we deliver using full end to end digital process models.

b. Principle 2 - Data driven

All services will proactively use data to inform decision making and report performance.

c. Principle 3 – Digital transformation

Digital Transformation will deliver modern digital technologies, automate manual processes and enhance our digital culture

d. Principle 4 – Secure by design

Digital services will be secure by design to protect the council's data, systems, people and residents.

e. Principle 5 - Robust and resilient infrastructure

The core foundations of our digital services will be robust and resilient to ensure we are working, and our services can be accessed, in the right place, at the right time and with the right device.

f. Principle 6 – Digital skills for all

Digital skills for all will support our staff and members through learning and development to safely benefit, effectively contribute to and access the councils' digital services.

4. Our digital strategy is mindful that the technology landscape can change quickly in today's modern digital world and to support local government reorganisation (LGR), so it will remain agile in its activities through regular strategic review points and the supportive guidance of the council's governance groups.
5. The proposed approach to digital is consistent with many other organisations, public and private. The development of the strategy considered the best practices currently being adopted across public and private sectors as well as needs and ideas unique to NFDC.

Corporate plan priorities

6. The digital strategy supports delivery of the Future New Forest programme.
7. The digital strategy aligns with the 'Customer and digital services' theme within our Transformation strategy.
8. The digital strategy links closely to our customer strategy with alignment throughout.
9. The digital strategy supports the 'empower' theme within our people strategy including a 'Digital skills for all' programme.

Options appraisal

10. The current digital strategy expires in 2025 and therefore required a refreshed strategy.

Consultation undertaken

11. The digital strategy is a joint delivery by the ICT Leadership team sponsored by the Strategic Director Corporate Resources and Transformation (Section 151 Officer) and Assistant Director - Transformation.
12. Assessment against other public sector strategies was undertaken.
13. Internal consultation with our Senior Leadership Team (SLT) contributed to the strategy content.
14. Internal consultation with the Executive Management Team (EMT) contributed to the strategy content.
15. The draft digital principles were presented to the Resources and Transformation Panel in November 2024 to seek feedback and contribute to the content of the strategy. The authors gratefully

acknowledge guidance from the panel group on, but not limited to, the following items:

- a. Process redesign and the use of tools such as process workflow diagrams
 - i. Considered in principles 1 and 3 when redesigning services. Process modelling tools are part of our standard toolkit.
- b. Digital services are accessible from all types of devices
 - i. Considered in principle 3 to design services that are 'device agnostic' and accessible from laptop, mobile, tablet and Windows, Android, Apple. Robust testing is being enhanced as part of our standard toolkit.
 - ii. Considered in principle 5 to ensure the provision of the right device for our staff and members.
- c. Clarity in language across the principles
 - i. Considered in all principles during development to the viewpoints of our residents, staff and members.
 - ii. Considered in principle 2 and how the proposed approach to accurate data or 'golden records' across multiple systems is reflected.
- d. Inclusivity of digital services for all
 - i. Considered in principle 1 and 3 including customers will still be able to contact us in a range of different ways alongside digital, according to their needs, including by phone and face to face.

Financial and resource implications

- 16. The annual ICT budget and Transformation business case will be funding the activities of this strategy. Transformation for example refers to the digital transformation projects and associated resources.
- 17. No additional resources are being requested at this time beyond what was included in the original transformation business case. A point in time review of skills and resource needs was completed in February 2025 with confidence in the approach and roles to be recruited. Future resource needs will be agile and proportionate.
- 18. All proposed resources are still required. Operational and Delivery activities continue to progress with resources being diverted to the highest priorities and a realistic and proportionate approach to timelines, quality and task completion.

Legal implications

19. None arising directly from this report. Applicable digital strategy activities will be appropriately assessed and taken under advisement of the Council's Legal team.

Risk assessment

20. Recruitment of the right skills and in a timely manner remain a challenge across the public sector.
21. The ICT service maintains and regularly reviews its service risk register to feed into the corporate principal risk register. Individual ICT projects maintain a risk log detailing specific tactical risks.
22. The technology landscape often changes at an accelerated pace and our strategy will remain agile to evolving internal and external factors such as LGR. We will prioritise, be open to opportunities and strategically review our direction to realign if needed within the guidance of our governance processes.
23. We will need to prioritise delivery of new digital solutions, whether planned or unplanned. The ICT work programme highlights regular strategic review points to align on strategic priorities and the service follows a demand management process.

Environmental / Climate and nature implications

24. Recycling of old ICT equipment is embedded within ICT Operational processes.
25. Digitising processes and reducing manual paper prints contribute to a positive climate and environment.
26. Adoption of cloud-based systems reduces the on premise footprint and usage of power and air conditioning as examples.
27. Through the provision of online self-service options, we facilitate reduced travel to our offices and therefore reduced emissions from vehicles.

Equalities implications

28. The digital strategy includes the 'digital skills for all' programme in partnership with the transformation strategy to promote a workplace where the digital training needs of all our staff and members are inclusive and considered.

Crime and disorder implications

29. None arising directly from this report.

Data protection / Information governance implications

30. None arising directly from this report. Changes impacting the collection and use of personal data will be appropriately assessed and taken under advisement of the Council's Information Governance team.

New Forest National Park / Cranborne Chase National Landscape implications

31. None identified

Appendices:

Appendix 1 – Digital Strategy 2025-2028 v0.5

Background Papers:

None

Appendix 1 – Digital Strategy 2025-2028 v0.5



Digital Strategy
2025-2028 v0.5.pdf

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Digital Strategy

2025-2028

ICT Services

Document publish date: 11/03/2025

Version number: 0.5

Version	Author	Date	Changes made
0.1	Data Development Delivery Manager ICT Operations Manager	23/10/24	Initial draft. Informal feedback.
0.2	Data Development Delivery Manager ICT Operations Manager	05/11/24	Senior Leadership Team (SLT) feedback.
0.3	Data Development Delivery Manager ICT Operations Manager	20/11/24	Consultation with SLT and ICT management team
0.4	Data Development Delivery Manager ICT Operations Manager	02/12/24	Incorporated feedback from SLT, Executive Management Team (EMT), Resources and Transformation Panel.
0.5	Data Development Delivery Manager ICT Operations Manager	11/03/25	Internal consultation. Approved by EMT.

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Principle 5 – Robust and resilient infrastructure.....	11
Principle 6 – Digital skills for all.....	12
Digital Pillars.....	13

Introduction

New Forest District Council (NFDC) has a Corporate Plan for 2024 to 2028 to meet our customer needs, protect finances and embed sustainability.

Our Digital Strategy covering 2025 to 2028 is an internal document intended to guide the organisation through digital decision making and best practice with commitments and actions that support delivery of the more outward facing customer and transformation strategies.

Our strategy will be delivered with 6 digital principles at its core:

- 1. Customer first, digital by design**
- 2. Data driven**
- 3. Digital transformation**
- 4. Secure by design**
- 5. Robust and resilient infrastructure**
- 6. Digital skills for all**

Previous digital strategies have delivered the foundations of our technology stack today including the use of a leading cloud server platform, reliable end user devices with remote access and the beginnings of cloud-based solutions supporting digital business processes.

Our updated strategy places our customers at the centre of the digital experience, and we are ambitious to embrace further the modern technologies of the future to offer a more immediate, personalised and convenient customer experience.

Customers who are unable to navigate our digital solutions will still be able to contact us in a range of different ways, according to their needs, including by phone and face to face.

Our strategy sets out plans to digitally transform, make better use of data and grow our digital skills together through a collaborative approach with staff, members, partners and other public sector organisations.

We will be realistic with our journey and visionary in our ambitions to meet the needs of a digital council.

Where are we now

The ICT service catalogue today has circa 200 digital services supporting the delivery of council services and providing digital tools to our staff.

The council's digital landscape is one where investment has allowed flexible working from any location through a resilient and accessible server infrastructure, staff have access to a variety of devices to best suit their needs and our software portfolio has seen a reduction in legacy applications with greater use of modern cloud platforms.

We continue to make use of platforms such as Microsoft 365 to support day to day working and reduce manual effort through automation. We are mindful there is more to do in this area alongside the introduction of new back-office systems.

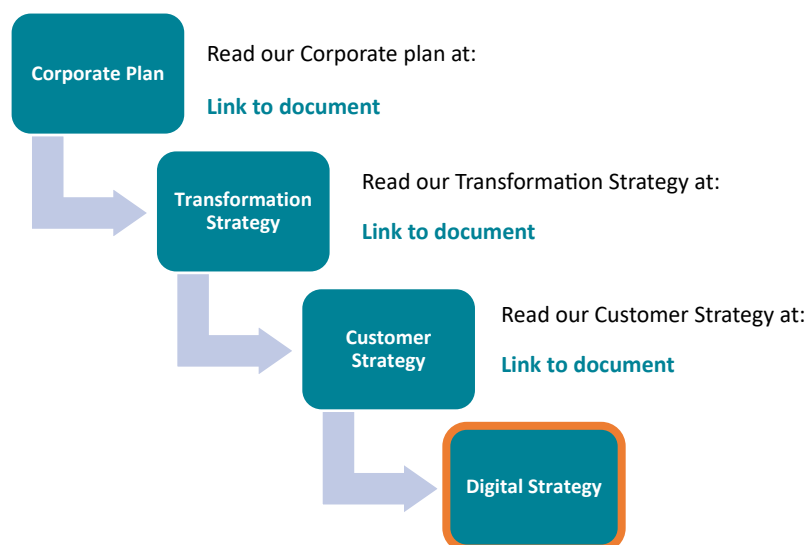
Our ICT Service team skillset has and continues to grow in all areas as we work to keep pace with an ever-changing digital world. This is equally true for our staff and members, where the adoption of digital systems has accelerated, and we must be mindful of this change impact and the need for further support to maximise the use of technology.

We have supportive ICT processes in place for, but not limited to, demand management, technical assurance, change management, project delivery, service delivery and cyber security which continues to be an ever-growing threat with increased and more sophisticated attacks on local government organisations a reality rather than a possibility.

We continue to balance our resources and plan appropriately to support and deliver growth in our digital maturity across the organisation.

With our new strategy in place, we are well placed to embark on a journey of digital transformation whilst fortifying the foundations put in place by previous strategies.

Strategic Planning and Alignment



Our digital strategy aligns with our overarching corporate plan and fits with the 'Customer and digital services' theme within our Transformation strategy.

Our digital strategy links closely to our customer strategy by supporting the growing demand from our customers for access to digital services by:

- Focusing on customer needs and outcomes when redesigning services.
- Supporting customers to self-help through online services.
- Updating systems and processes to keep pace with advancing digital technologies.
- Improving customer experience by integrating data and systems.
- Making it easier for customers to find services and connect at their convenience.

Our digital strategy supports the 'empower' theme within our people strategy including a 'Digital skills for all' programme that aims to support digital learning and development for all staff and members.

Collaboration and enablement are part of our digital strategy to support the delivery of departmental service plans so all our services can realise the benefits that modern technology can bring.

Digital Vision and Principles

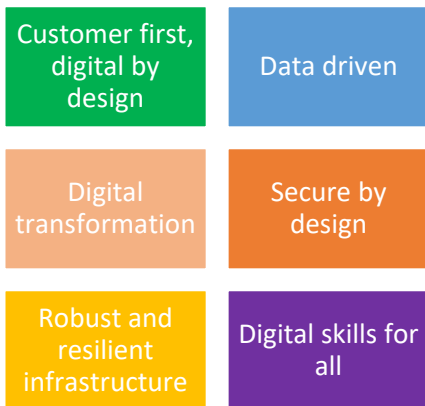
Our 6 digital principles are the foundation of our digital strategy, all contributing to the overall digital vision to be a digital council that embraces the opportunities of technology and modern digital service design to empower our staff with best-in-class digital tools to efficiently deliver an effective 'customer first' experience for its residents.

Our principles will drive how digital technology is adopted and used across the council with clear alignment to our corporate plan and transformation strategy.

Our Digital Vision:

“to be a digital council that embraces the opportunities of technology and modern digital service design to empower our staff with best in class digital tools to efficiently deliver an effective ‘customer first’ experience for its residents”

The 6 Digital Principles



Principle 1 - Customer first, digital by design



Customer needs will be at the heart of the digital services that we design and deliver.

Our digital services will be inclusive to the needs of all our customers including residents, staff, members, partners and local businesses.

Through a 'customer first, digital by design' approach the council can offer services that are accessible twenty-four hours a day, allowing our customers to apply for, pay for, view and report at times that are convenient to them.

By working in partnership with service areas, ICT can be an enabler of digital across the council, helping individual teams realise their digital benefits.

We will:

- design services to improve customer experiences, make better use of technology and reduce manual effort through automation
- enable customers to interact and access services digitally at a time that suits them
- implement a customer relationship management system that keeps customers informed on progress and instils confidence in service delivery
- increase the number of services available online

- ensure customers will still be able to contact us in a range of different ways alongside digital, according to their needs, including by phone and face to face.
- be a strategic enabler for services across the council to enable them to realise their digital goals through collaborative and two-way partnership working
- build a 'Customer First, Digital by Design' mindset and shared understanding in the council.



How will this be measured:

- Resident satisfaction with Council services
- effectiveness of collaboration between ICT and service areas identified through regular feedback and senior leadership participation
- reduction in use of paper to digital methods for high transactions
- increase in online payment options for high transactions
- increase online service and self-service options for high customer contact and key transactions

"Customer needs will be at the heart of the digital services that we deliver using full end to end digital process models."

Principle 2 - Data driven



All services will proactively use data to inform decision making and report performance.

The council securely stores various datasets to support the services it delivers. Typically, data is based on a person, a place or a thing.

Through a council wide Data Framework that incorporates the best practice of Master Data Management (MDM), data can be extracted, transformed, stored and made available to those who need it and are permitted to access it.

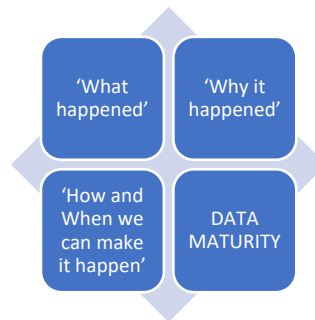
We will hold a central and accurate record relating to each of our customers and assets which can be relied on for informed decision making.

With accurate data, council staff will be able to see a '360 view' of our customers and assets providing an integrated and consolidated view of data from multiple systems.

The introduction of a Digital Data Platform will provide the technical foundations for storing data held by the council. The platform will store the council's data securely, will provide access to those who need it and facilitate visually rich reports and dashboards for analysis and business intelligence.

As the council's data maturity position evolves, it will describe 'What

happened', diagnose 'Why it happened' and in time predict 'How and When we can make it happen'.



We will:

- deliver a Data Framework to be adopted across the council that outlines our approach to data including policies, processes and systems
- deliver a Digital Data Platform based on modern technology for the secure storage of council data and to act as a data warehouse
- make use of digital tools such as Power BI to visualise, analyse and report on data
- develop the skills of our staff to use data in the most effective way

How will this be measured:

- adoption of a council wide Data Framework
- real world examples of where data analysis has helped inform and improve service delivery
- the number of datasets available online

“The Data Framework and Digital Data Platform will ensure our data is Manageable, Accurate, Searchable and Compliant”

Principle 3 - Digital transformation



Digital Transformation will introduce positive change through the design of modern and innovative digital services.

Digital Transformation (DT) will create new or modify existing business processes, culture, and deliver exceptional customer experiences.

The ICT work programme will deliver digital change through various projects that support our wider Transformation programme and put our customers at the forefront of service design.

Supportive governance and best practice project delivery including detailed planning, risk management, financial management and resource planning will look to mitigate risks of not delivering on time and on budget.

Our technical enterprise architecture will bring together different technologies such as cloud computing, artificial intelligence, data analytics, and automation to standardise and apply common design patterns to increase efficiency and release capacity across the council.

“Digital Transformation will deliver modern digital technologies, automate manual processes and enhance our digital culture”

We will:

- standardise and apply common design patterns and platforms across the council to release capacity and deliver efficiency benefits
- maximise the use of new technology and keep our software up to date
- maximise the use of M365 technology
- explore the safe, compliant and ethical use of AI
- explore the use of low code platforms and the benefits of developing in house solutions alongside ‘off the shelf’ products
- build services that are device agnostic, working on all laptop and mobile devices
- enable digital goals to be met through service led design whilst maximising the benefits and expertise of the central ICT team
- benchmark against industry best practice and other local government organisations

How will this be measured:

- percentage of annual ICT work programme delivered on time and on budget
- benefit realisation from ICT investment
- resident satisfaction score with the quality of NFDC digital services
- staff satisfaction score with NFDC ICT services

Principle 4 – Secure by design



Digital services will be secure by design to protect the council's data, systems, people and residents.

All digital services that we offer will be secure by design. This prioritises security from the outset of product design and throughout its lifecycle.

The council will need to take a holistic approach to cyber security prioritising it as a core business requirement rather than a technical feature.

The management of cyber security risk is an organisational wide responsibility, not limited to the ICT service. ICT will provide expert technical advice for the organisation to mitigate or accept.

Security for projects within the ICT work programme will be technically assured throughout its lifecycle and sustained through its transition into live service.

There are obligations that the council must meet in relation to cyber security and information security as well as standards that the council will commit to maintaining. These obligations and standards should be met with a minimal impact on delivering good quality services.

We will:

- design services in line with security best practice ensuring that the council maintains compliance to Public Services Network Code of Connection and DWP Memorandum of Understanding
- affirm the council meets industry standards for security through recognised accreditations like Cyber Essentials
- follow the corporate approach to risk management and align with its appetite to risk
- ensure the council has a robust and fit for purpose cyber security policy and staff awareness plan
- undertake a proactive approach to cyber security event prevention and response management

How will this be measured:

- minimised impact from security incidents
- accreditations and compliance gained year on year
- less vulnerabilities being captured within the internal and external scans
- 100% of staff undertaking the mandatory security and information governance policy training

“The council will need to take a holistic approach to cybersecurity prioritising it as a core business requirement”

Principle 5 – Robust and resilient infrastructure



Digital services will be underpinned by robust and resilient infrastructure.

Delivery of all services is increasingly reliant on ICT systems and connectivity therefore it is essential that the underpinning infrastructure is robust and resilient but also flexible and agile to meet changing business requirements, technology advancements and the ever-changing landscape of cyber security threats.

The technical (servers, networks, end-user devices) and non-technical (operating model, policies, licencing, training, roles & responsibilities) infrastructure must become flexible and responsive to meet the accelerating pace of technology changes being embraced by the council.

The council already makes use of Infrastructure as a Service (IaaS) and Platform as a Service (PaaS) via the Microsoft Azure stack, reducing our on-premise server footprint and maximising the benefits of a globally recognised platform.

Service areas will maintain their own business continuity plans to invoke in the event of a disaster affecting digital services.

We will:

- provide secure, robust and reliable systems and support that underpin service delivery
- ensure there are robust ICT disaster recovery and ICT business continuity plans in place for ICT systems
- ensure staff and members have the right end user device for their role
- be a 'cloud first' council, making use of Software as a Service (SaaS), Infrastructure as a Service (IaaS) and Platform as a Service (PaaS) platforms where appropriate

How will this be measured:

- the percentage of unscheduled downtime for critical systems will be less than 5%
- regular testing of the disaster recovery plan to ensure its fit for purpose
- reduction in hardware-based incident tickets

“The core foundations of our digital services will be robust and resilient to ensure we are working in the right place, at the right time and with the right device.”

Principle 6 – Digital skills for all



Staff will be supported through learning and development in digital skills to safely benefit from and contribute to the councils digital services.

Through our 'Customer First, Digital by Design' principle, we will be introducing new digital technology for staff, members and residents to make use of.

We know that our residents want to transact digitally with us and have access to services at a time that is convenient to them so the need to keep pace with the ever-changing technology landscape is important to maximise the use of technology and ensure we are realising the benefits that digital business processes can bring.

Cyber threats continue to evolve in the digital age so equipping our staff with the right skills to use technology safely and ensure our data is secure is fundamental.

We must be mindful that our staff have varying levels of digital skills so investment in skills development, training and career progression opportunities will help ensure an appropriately skilled, resilient and positive wellbeing workforce.

We will:

- ensure ICT staff have learning and development objectives that align to the current and future technology landscape
- explore Digital Skills training for all council staff and members
- embed training for staff as part of digital projects to ensure appropriate skill levels at the point of service transition

“Digital Skills for All will be inclusive and mindful of the specific digital learning needs of all staff”

“Digital Skills for All will support our staff through learning and development to safely benefit, effectively contribute to and access the councils’ digital services”

How will this be measured:

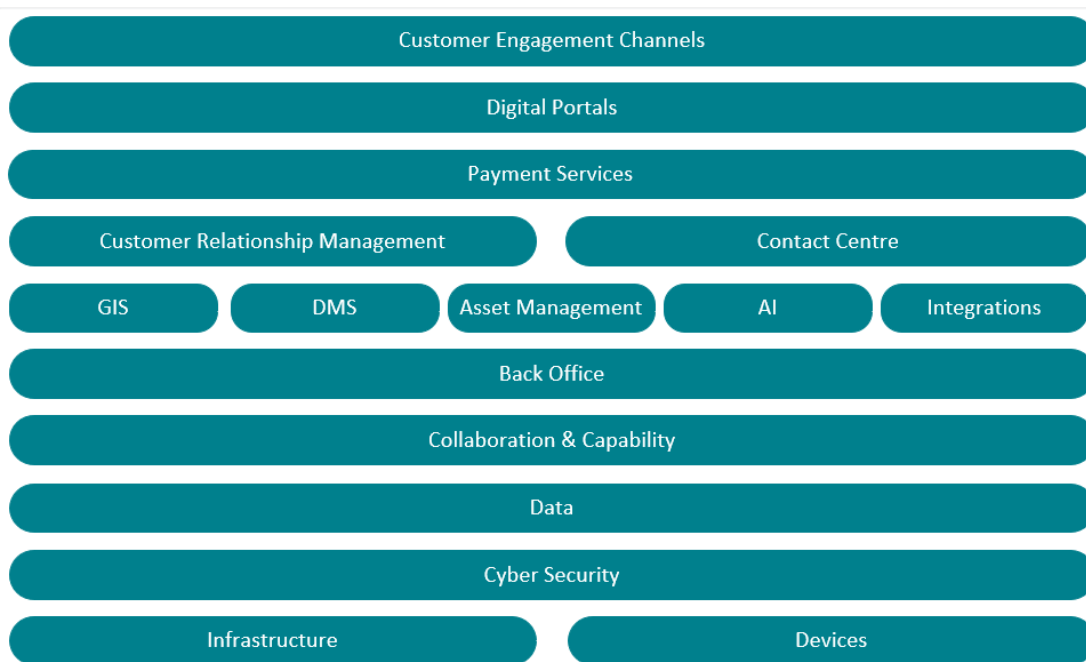
- digital skills maturity assessment of staff before and after the 'Digital Skills for All' programme
- increased efficiency in services through the more efficient use of technology demonstrated by real work examples
- Staff satisfaction score with NFDC ICT services

Digital Pillars

The development of customer first, digital by design services will be facilitated through the provision, operation and enhancement of our digital pillars.

These digital pillars will comprise of many technologies and systems brought together in a consistent and integrated suite of products and services.

The digital pillars will facilitate our enterprise architecture, where our approach is to reuse and maximise value of technology across all council services, providing a consistent customer experience with simplified and automated processes.



“The Digital Pillars will align to and support our organisational design principles with an holistic systems thinking approach and corporate enterprise architecture design”

“The Digital Pillars are a suite of integrated digital products and services providing the technical foundations for our council services.”

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Resources and Transformation Overview and Scrutiny Panel

20 March 2025

Platinum Jubilee Business Park – Removal of BREEAM Very Good accreditation condition.

Purpose	Non-Decision making
Classification	Public
Executive Summary	The report gives an overview of the removal of a planning condition to attain BREEAM Very Good accreditation on a Council owned commercial development.
Recommendation	That the Panel consider and review the contents of the report.
Reasons for recommendation	To follow a recommendation made by the Planning Committee on 09 th October 2024.
Ward(s)	All
Portfolio Holder(s)	Cllr Jeremy Heron Portfolio Holder for Finance and Corporate
Strategic Director(s)	Alan Bethune Strategic Director Corporate Resources & Transformation Section 151 Officer
Officer Contact	Philip Marston Estates & Valuation Manager Telephone Number: 02380 285126 Email address: Philip.marston@nfdc.gov.uk

Introduction and background

1. In June 2019, the Council purchased employment development land under its adopted 'Asset Investment Strategy' 2017 (Revised Sept 2022). The intention was to build the development under its existing planning permission which was obtained by the previous owners – Linden Homes Southern Ltd.

2. The existing planning permission included other adjacent development not pertaining to this purchase being residential and a care home. Linden Homes developed the residential phase and sold the care home and flexible business units (Class B1) in phases, the latter phase purchased by the Council.
3. A business case was produced and a budget of £8,445,000 (including contingency £1.08m) was approved by Council in September 2021. The Business Case confirmed that: 'The project is seeking to provide a development which meets the requirements of BREEAM Very Good.' At that time, the Council's adopted planning policy did not include a position relating to BREEAM 'Very Good' accreditation.
4. An application was made in October 2021 to widen the use class to include B8 (Storage and distribution) on 14 of the 20 business units. This application was approved but not until September 2022 and with a new condition that Blocks B, C, D and E are required to achieve a BREEAM 'Very good' standard. This did not apply to Block A and the office Blocks F and G.
5. What is BREEAM? - **Building Research Establishment Environmental Assessment Method** is used to masterplan projects, infrastructure, and buildings. It focuses on sustainable value across range of categories:
 - Energy.
 - Innovation
 - Land use and ecology.
 - Water.
 - Health and wellbeing.
 - Pollution.
 - Transport.
 - Materials
 - Waste.
 - Management.
6. The Council commissioned SRE as its BREEAM consultants in 2020 and a pre-assessment was undertaken outlining a potential route to the targeted score.
7. BREEAM was not set as a specific planning condition for the scheme until part way through the construction process in September 2022, however all efforts were made by the project management team to achieve the required credits. It was confirmed in 2023 following completion of the development that this was not achievable.
8. It was therefore necessary to seek to remove the planning condition to avoid any breach.

9. Many BREEAM criteria require early-stage planning to be implemented to achieve the required standards. The BREEAM assessment is a wide-reaching sustainability approach which requires specific design and construction standards and monitoring which were not considered and undertaken during the initial stages of the construction works (including during the initial construction of the access road by Linden Homes, as a condition of the sale). As the development passed these time thresholds and has been completed without the appropriate consideration being given, it now cannot achieve certain mandatory credits required early in the process to achieve a BREEAM rating. A BREEAM Review Report was commissioned and submitted with the planning application which outlines that, at this stage, it is not possible to feasibly achieve a BREEAM standard due to the failure to achieve mandatory credits earlier in the process (appendix 1).

Corporate plan priorities

10. The development was primarily completed to support the economic growth priorities within the previous iteration of the Corporate plan. This is still relevant within the current iteration of the Corporate Plan, through the following Prosperity priorities;
- Priority 1: Maximising the benefits of inclusive economic growth and investment.
 - Priority 2: Supporting our high-quality business base and economic centres to thrive and grow.

Consultation undertaken

11. As part of the planning application process, both internal and external consultation was carried out, resulting in one submitted comment from Ringwood Town Council being: *Happy to accept a delegated officer decision. The Council was very disappointed that the developer and NFDC didn't meet BREEAM 'very good' requirements from the outset, given that this was flagged in the 2018 BREEAM pre-assessment and carried out by SRE for NFDC, and that NFDC finds itself in the position where it is now unobtainable.*
12. No other Councillor or consultee comments were received.

Financial and resource implications

13. The project was delivered within the allocated budget of £8,445,000 with an overall underspend of approximately £460,000. More than

£250,000 was specifically dedicated to sustainable elements of the development.

Legal implications

14. The relevant planning condition has been removed after the Planning Committee's decision on 9 October, so there are no legal implications of a potential breach of the planning permission.

Risk assessment

15. There is no requirement for a risk assessment, as the report is intended for review only.

Environmental / Climate and nature implications

16. Although the BREEAM accreditation was not achieved, the development has achieved many sustainable features that are requirements of BREEAM accreditation including:
 - Live energy and water monitoring.
 - Installation of Photo Voltaic (PV) solar roof panels to 15 of the 20 business units.
 - High Energy Performance Certificate (EPC) ratings from the highest ratings of two units being A+, twelve units being A and one unit of B rating.
 - Installation of soakaways and attenuation tanks.
 - Electric Vehicle (EV) charging points to every unit.
 - Flood risk assessments.
 - Managing the development during construction to minimise the impact on surrounding properties.
 - Use of certified contractors.

Equalities implications

17. No implications.

Crime and disorder implications

18. No Implications.

Data protection / Information governance / ICT implications

19. No implications.

Conclusion

20. Although an early BREEAM Pre Assessment was undertaken outlining a potential route to the targeted score, it is understood

that BREEAM was not set as a specific planning condition for the scheme until part way through the construction process. This is very unusual and in direct conflict with the intent of the BREEAM process, which is focused on embedding sustainability into projects from the outset, as demonstrated by the 17no. targets that require action prior to the completion of RIBA Stage 2. If early-stage credits are not actioned, it is extremely challenging for a project to achieve BREEAM certification and, in this case, not possible.

21. BREEAM aims to push projects above and beyond best practice, therefore it stands to reason that unless the relevant items are specifically targeted, they are highly unlikely to be achieved. A detailed review of the project documentation confirms this. While there are some relevant references in isolation, these would not be sufficient to achieve certification.
22. Regrettably, there is a clear implication on the lapse in actions and the timing of the BREEAM aspiration at the outset and the actual planning condition requirement to achieve it. Learning from this is to engage early in the pre-construction period and to attempt a more successful engagement with previous landowners.

1. Appendices:

Appendix 1 -RIDGE -Platinum
Jubilee Business Park BREEAM
Review Report March 2024.

Background Papers:

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RIDGE

PLATINUM JUBILEE BUSINESS PARK,
RINGWOOD
BREAM REVIEW REPORT
MARCH 2024



**PLATINUM JUBILEE BUSINESS PARK, RINGWOOD
BREEAM PRE-ASSESSMENT REPORT**

March 2024

Prepared for
New Forest District Council

Prepared by
Ridge and Partners LLP
1 Royal Court
Kings Worthy
Winchester
SO23 7TW

Tel: 01962 834400

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Abby Foster
Sustainability Consultant
afoster@ridge.co.uk

Tel: 07469379175

1. INTRODUCTION

Ridge and Partners LLP have been appointed by Andrew Morton of New Forest District Council (NFDC) to undertake a review of the BREEAM assessment for the Jubilee Business Park project, also known as Crow Arch Lane.

From discussions with Andrew and Chris Webb of Currie and Brown, it is understood that BREEAM became a planning requirement on the scheme mid-way through construction when a condition for BREEAM Very Good was set. Prior to this there had been an aspiration to achieve BREEAM certification however this had not been embedded into the project documentation as confirmed by a review of the tender pack.

This report has been written by Abby Foster (previously Bartlett), a qualified Building Research Establishment Environmental Assessment Method (BREEAM) assessor; BRE Reg. SHD-AB41

2. BREEAM PROCESS

2.1. Overview

BREEAM is a performance-based assessment method and certification scheme for new buildings. The primary aim of the BREEAM process is to mitigate the life cycle impacts of new buildings on the environment in a robust and cost-effective manner. This is achieved through integration and use of the scheme by clients and their project teams at key stages in the design and procurement process. This enables the client, through the BREEAM Assessor and the BRE Global certification process, to measure, evaluate and reflect the performance of their building against best practice in an independent and robust manner. This performance is quantified by a number of individual measures and associated criteria stretching across a range of environmental issues which is ultimately expressed as a single certified BREEAM rating.



Figure 1 - BREEAM Categories

The potential BREEAM ratings for a building are as shown below:

Table 1 – BREEAM Rating Benchmarks

RATING	PERCENTAGE SCORE	EQUIVALENT PERFORMANCE
Outstanding	≥ 85	Less than 1% of UK new non-domestic buildings
Excellent	≥ 70	Top 10% of UK new non-domestic buildings
Very Good	≥ 55	Top 25% of UK new non-domestic buildings
Good	≥ 45	Top 50% of UK new non-domestic buildings
Pass	≥ 30	Top 75% of UK new non-domestic buildings
Unclassified	<30	Failed to meet minimum BREEAM criteria

2.2. Assessment Timeline

Figure 2 below provides a comparison of the RIBA outline plan of work with the BREEAM assessment stages.

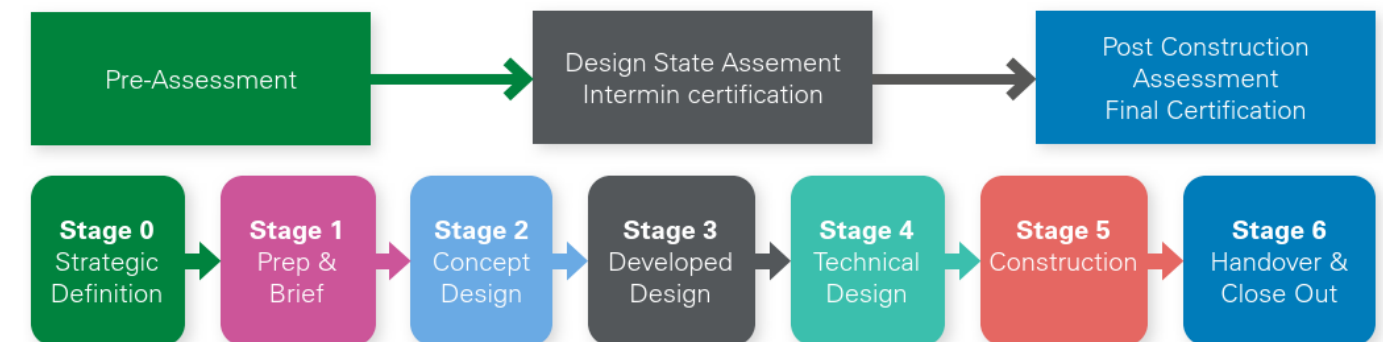


Figure 2 - BREEAM assessment and certification stages and the RIBA Outline plan of works

2.3. Scoring

The BREEAM assessment is made up of a total of 10 separate categories as summarised in Figure 1 on the previous page, each containing a variety of different environmental issues. Although some of the issues are mandatory for specific scores, as summarised in the next section, the majority are tradable i.e. the team can choose to target them or not depending on their suitability and achievability for the assessed building.

Each of the categories carries an associated weighting which is applied to credits achieved in that category to calculate the total score for the assessed building. The weightings vary depending on the type of building being assessed and whether certain elements are included or excluded from the scheme. For example, if a lift or escalator are not part of the proposals then Ene 06 – Energy Efficient Transportation Systems will be filtered out of the assessment and the weightings updated accordingly, similarly shell and core developments will have certain criteria filtered out as they are beyond the scope of the development.

As a summary, the fully fitted scheme weightings are typically as follows:

Table 2 – Scheme weightings

ENVIRONMENTAL CATEGORY	WEIGHTING
Management	11%
Health & Wellbeing	14%
Energy	16%
Transport	10%
Water	7%
Materials	15%
Waste	6%
Land Use & Ecology	13%
Pollution	8%
Innovation (additional)	10%

Therefore, when design teams are considering tradable credits, it is important to remember that the loss of a single credit in the energy or health and wellbeing category is likely to have a different impact on the overall score than the loss of a water or waste credit.

2.4. Mandatory Requirements

Whilst most BREEAM credits are tradable and can be targeted in various configurations to achieve the required overall score, there are minimum requirements set to achieve certain BREEAM ratings. Table 3 below highlights the mandatory requirements for all of the different BREEAM ratings.

Table 3 – BREEAM New Construction v6.1 Mandatory Requirements

BREEAM ISSUE	PASS	GOOD	VERY GOOD	EXCELLENT	OUTSTANDING
Man 03: Responsible construction practices	None	None	None	One credit (Responsible Construction Management)	Two credits (Responsible Construction Management)
Man 04: Commissioning and handover	None	None	One credit (Commissioning test schedule and responsibilities)	One credit (Commissioning test schedule and responsibilities)	One credit (Commissioning test schedule and responsibilities)

Man 04: Commissioning and handover	None	None	Criterion 11 (Building User Guide)	Criterion 11 (Building User Guide)	Criterion 11 (Building User Guide)
Man 5: Aftercare	None	None	None	One credit (Commissioning implementation)	One credit (Commissioning implementation)
Ene 01: Reduction of energy use and carbon emissions	None	None	None	Four credits (Energy performance or Prediction of operational energy consumption*)	Six credits (Energy performance) and Four credits (Prediction of operational energy consumption*)
Ene 02: Energy monitoring	None	None	One credit (First sub-metering credit)	One credit (First sub-metering credit)	One credit (First sub-metering credit)
Wat 01: Water consumption	None	One credit	One credit	One credit	Two credits
Wat 02: Water monitoring	None	Criterion 1 only	Criterion 1 only	Criterion 1 only	Criterion 1 only
Mat 03: Responsible sourcing of materials	Criterion 1 only	Criterion 1 only	Criterion 1 only	Criterion 1 only	Criterion 1 only
Wst 01: Construction waste management	None	None	None	None	One credit
Wst 03: Operational waste	None	None	None	One credit	One credit

2.5. Early-Stage Actions

It is recommended that the client and design team review all available credits as early as possible in the project, as they can become difficult or indeed impossible to achieve if considered later in the design stages of the development as it is generally easier to incorporate changes into the design before it has developed too far.

The BRE recognise this within the BREEAM New Construction version 6.1 methodology and as such there are various time bound issues that can be targeted which are summarised in Table 4 below;

Table 4 – Early RIBA stages summary

RIBA STAGE	CREDIT REFERENCE	NOTES
Stage 1	Tra 02 Sustainable Transport Options	During preparation of Project Brief the design team consult with local authority about local cycling network and publicly available pedestrian routes
	Mat 03 Responsible Sourcing of Construction Products	Company/Site Wide Sustainable Procurement Plan to be in place before Concept Design
	Mat 06 Material Efficiency	Set targets and report on opportunities and methods to optimise the use of materials
	Le 02 Ecological Risks & Opportunities	For Route 2 - Suitably Qualified Ecologist (SQE) appointed prior to completion of Preparation & Brief stage to undertake survey of site and evaluate its current ecological baseline.
Stage 2	Man 01 Project brief and design	Project delivery stakeholders to meet and discuss all relevant items prior to completion of Concept Design Design team to consult with all interested parties prior to completion of Concept Design – these discussions should influence the Initial Project Brief and Concept Design A BREEAM AP is appointed at Concept Design stage to work with the design team to facilitate the BREEAM assessment. This is a separate role to BREEAM assessor but can be carried out by the same person if they are suitably qualified.
	Man 02 Life cycle cost and service life planning	Elemental Life Cycle Cost (LCC) analysis to be completed at this stage
	Hea 06 Safety and Security	Suitably Qualified Security Specialist to conduct an evidence-based Security Needs Assessment of the site prior to the end of Concept Stage.

Ene 04 Low carbon design	Passive design and free cooling options to be analysed at Concept Stage to identify opportunities for implementing measures. An accredited energy assessor to complete an LZC feasibility study and specify technologies for implementation
Mat 01 Environmental Impact	Team to demonstrate environmental performance of the building at Concept Design by carrying out LCA on 2-4 different superstructure options and submit results to BRE before end of Concept Design. Covers superstructure, substructure, hard landscaping and building services.
Wst 01 Construction Waste Management	Where relevant a pre-demolition audit must be undertaken at Concept Design by a competent person.
Wst 05 Adaption to climate change	Climate Change Adaptation Strategy Appraisal to be produced providing recommendations or solutions to mitigate possible future impacts.
Wst 06 Functional adaptability	Building specific Functional Adaptation Strategy Study to be developed by the end of Concept Stage to include recommendations or solutions for the design to incorporate.
Le 02 Ecological Risks & Opportunities	Project team liaise and collaborate with representative stakeholders to consider ecological outcome for site.
Le 03 Managing Negative Impacts on Ecology	Roles and responsibilities to be clearly defined and implemented to support successful delivery of project outcomes to influence Concept Design or Design Brief

3. BREEAM REVIEW

The Platinum Jubilee Business Park scheme has been completed and handed over for some time now with practical completion achieved on 27 April 2023, unfortunately the BREEAM certification has not yet been confirmed.

To explore the reasons behind this, Abby Foster, accredited BREEAM assessor, met with Andrew Morton of NFDC and Chris Webb of Currie and Brown on two separate occasions;

- Friday 9th February 2024
- Tuesday 5th March 2024

Following the initial meeting, Chris Webb provided a link that contained project documentation. This was reviewed with regards to specific reference to BREEAM and also a high-level consideration of whether BREEAM related targets were included. Please note that where BREEAM criteria is referenced e.g. Wat 02, this does not mean that the documentation provided confirmed compliance, simply that it aligns with the type of documentation that would usually be expected to be seen. It is beyond the scope of this exercise to confirm compliance with BREEAM criteria.

Hoare Lea Engineering Services Specification – Volume 1

- No direct reference to BREEAM

Hoare Lea “Y” Section MEP Services Reference Specification - Volume 2

- BREEAM 2014 credit Man 05 to be achieved (p203)
- Y71 (p274) confirms all meters to be provided with Modbus pulsed outputs (Ene 02)
- Y25 (p93) confirms pules output water meter to be provided (Wat 02)

Hoare Lea Performance Specification - Volume 3

- BREEAM Very Good to be achieved (p4)
- Water utility meter to have pulsed output for monitoring and alarming for BREEAM (Wat 02) (p5)
- Leak detection (Wat 02) (p6)
- External lighting (Hea 01, Ene 03, Pol 05) (p8)
- PV panels (Ene 04)

Hoare Lea Supporting Docs - Volume 4

- SRE BREEAM Pre Assessment appended dated 28/10/2020 – proposed score of 62.78% for offices and 63% for industrial
- SRE Thermal Comfort Analysis appended dated 05/11/2020 (Hea 04)

AKS Ward Civil & Structural Employers Requirements

- Confirms Flood Risk Assessment completed by RPS in Nov (Pol 03)
- Proposed approach is that surface water drains to soakaways which should allow Pol 03 credits to be maximised if this was undertaken although robust evidence would be required to confirm this if claimed

Boyle & Summers - Architectural Specification and drawings

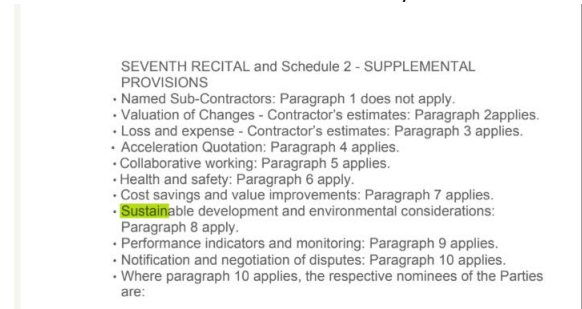
- No direct reference to BREEAM
- No reference to common responsible sourcing schemes e.g. FSC or BES 6001, although specific products are referenced that we know do have some accreditation e.g. Kingspan Kooltherm, so this could be reviewed further
- Welfare block provided which includes shower facility – may help towards Tra 03 credits
- Cycle hoops provided – Tra 03 overlap

Currie & Brown Pre-Construction Information

- No reference to BREEAM

Tender Pack (2no. separate docs)

- No reference to BREEAM only reference to Sustainability was in the Prelims as follows;



Amiri Appendix C3 Basis of Tender

- States that they have included for the measures incorporated into the issued architectural and services specification, no allowance has been made for any other measures that may be required (p6)

BREEAM/Sustainability Measures: We have included the measures incorporated within the issued architectural and services specifications, no allowance has been made for any other measures that may be required. We understand that this aspect of the project is aspirational, therefore please note the provisional sum we have included at this stage for any related testing, reporting or other associated services that may be required.

4. CONCLUSION

Following discussions with Andrew Morton of NFDC and Chris Webb of Currie and Brown, and a detailed review of project documentation, the primary reason that BREEAM has not been achieved to date appears to be related to the timing around it being set as a formal requirement.

Although an early BREEAM Pre Assessment was undertaken outlining a potential route to the targeted score, it is understood that BREEAM was not set as a specific planning condition for the scheme until part way through the construction process. This is very unusual and in direct conflict with the intent of the BREEAM process which is focused on embedding sustainability into projects from the outset, as demonstrated by the 17no. targets that require action prior to the completion of RIBA Stage 2, outlined in section 2.5 of this report. If early stage credits are not actioned, it is much more challenging for a project to achieve BREEAM certification.

On a practical level, once the scheme is halfway through construction it is far too late for any of the design related requirements to be incorporated as the design itself has already been completed and coordinated between the various disciplines. Perhaps even more significantly, it is also too late for the majority of construction related requirements to be achieved as these typically would have to be in place from the start of the construction process, for example collation of energy, water and transportation data for the construction site.

It is worth highlighting that BREEAM aims to push projects above and beyond best practice therefore it stands to reason that unless the relevant items are specifically targeted, they are highly unlikely to be achieved. A detailed review of the project documentation confirms this. While there are some relevant references as outlined in section 3, in isolation these would not be sufficient to achieve certification.

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Resources and Transformation Overview and Scrutiny Panel – 20 March 2025

Corporate Plan: Key Performance Data for Quarter 3 2024-25

Purpose	For Review
Classification	Public
Executive Summary	Corporate Plan Key Performance Indicators (KPIs) are presented for Q3 covering October 2024 to December 2024. Measure IDs 34 through to 48 only are for Resources and Transformation review.
Recommendation(s)	That the Panel consider and review the Q3 dashboard.
Reasons for recommendation(s)	These Key Performance Indicators are integral to our Corporate Plan 2024-2028. Reporting and accountability for the commitments set out in the plan are described in our Performance Management Framework.
Ward(s)	All
Portfolio Holder(s)	Councillor Jill Cleary, Leader
Strategic Director(s)	Alan Bethune, Strategic Director Corporate Resources S151 and Transformation
Officer Contact	Saqib Yasin Performance and Insight Manager 023 8028 5495 Email address: saqib.yasin@nfdc.gov.uk

Introduction and background

1. The Corporate Plan Key Performance Indicators (KPIs) dashboard is presented for review. Having recently published and circulated data for Q1 and Q2, we can now present data for Q3 covering October 2024 to December 2024 where available.

2. Data reported with a lag is updated to the respective quarterly dashboard where this is now available. Both measures are allocated to the Place and Sustainability panel and are:
 - **Kilogrammes of non-recycled waste produced per household.** Quarter 2 data is now available and is indicated on the Q3 dashboard under 'previous period' value. i.e. 220.9kg.
 - **Percentage of household waste sent for recycling.** Quarter 2 data is now available and is indicated in the Q3 dashboard under 'previous period' value. i.e. 39.0%.
3. As per our Performance Management Framework, following EMT approval (on the 25/02/2025), the Q3 dashboard will be passed through to panels with associated covering reports. These reports will focus attention to the measures aligned to each panel.

The following should be read in conjunction with the Q3 dashboard referenced in the appendix.

4. **Layout of the dashboard.**

There are 48 KPIs in total presented in the dashboard. Each is organised by Corporate Plan theme and then priority. The Portfolio Holder and associated panel for each KPI is given.

Data metadata is shown as follows:

- Desired direction of travel – indicates whether good performance is typified by an increasing or decreasing value
- Return format – shows the unit of the value being reported
- Frequency – shows how often the KPI is to be reported
- Target – shows the desired value
- This period – shows the value for the given reporting period
- RAG status are as per our Performance Management Framework
 - Green, on target or above target
 - Amber, up to 10% below target
 - Red, over 10% below target

5. Feedback from previous panels

6. It was acknowledged that complementing the dashboard, this Panel received a number of significant reports on a regular basis, for example on the Freeport, the Transformation Programme, complaints and numerous budget reports.
7. The layout of the dashboard has been upgraded as per recommendations from panels. The dashboard is presented in colour and it is recommended that it is best viewed on an electronic device. The dashboard can then be viewed and zoomed in as appropriate.

Panels asked that it be clearer which panels the KPIs relate to. The dashboard now has a header for each panel with the KPIs listed below, further organised by Corporate Plan priority.

The rearrangement of the dashboard has enabled the presentation to fit the page in a clearer format.

8. Quarter 3

Data is presented for 27 of the KPIs with 10 KPIs marked for consideration at Resources and Transformation Panel.

Highlights

ID	Observation
Resources and Transformation	
37	<p>Percentage of vacancies filled first time.</p> <p>We have recalculated this measure in line with the definition and rationale that was set as part of the corporate plan.</p> <p>This was previously counting recruitment campaigns, many of which were still open at the time of reporting. This was negatively affecting results where a recruitment decision had not yet been made. The KPI has been revised and takes into account the following:</p> <ul style="list-style-type: none">• The number of appointments made in the reporting period.• Of those appointment made, the percentage that were appointed to in the first round of recruitment.

	<p>Performance is above target this quarter, as are revised figures for quarters 1 and 2.</p> <p>This revision was approved at the Executive Management Team meeting in February 2025.</p>
39	<p>Average number of days sickness absence per employee.</p> <p>Although still red-rated, this has improved from the position last quarter. Every step is taken to be satisfied that sickness absence is genuine, that sickness is reducing and that we are managing sickness effectively.</p> <p>HR colleagues work closely with managers to apply our policies effectively and seek resolution to any sickness absence.</p>
41 and 42	<p>Council budget and Housing Revenue account – although preliminary figures, our budget position remains strong.</p>
43	<p>Council tax collection. This is amber with some holiday lets being transferred from business rates to council tax following Valuation Office Agency determinations. These bills have only recently been set with some residents disputing the decision. In other cases, some collections have been spread to March and so we expect collection to be on target at year-end.</p>
44	<p>Non-domestic rates collection is above target.</p>
45	<p>Benefits realisation from ICT investment is performing well with residual work for the security module of the learning management system expected to be achieved in quarter 4.</p>
47	<p>93% of annual ICT work programme has been delivered on time and within budget. The direct debit delivery was re-profiled to enable further transition work with services.</p>
46 and 48	<p>97% of ICT incidents were resolved within the SLA and there was only 0.16% of unscheduled down-time for critical systems.</p>

Corporate plan priorities

9. The dashboard presents the KPIs ordered by our new corporate plan priorities.

Options appraisal

10. The KPI list 2024-2028 has been developed following extensive work and consideration of alternative KPIs and targets. This work was completed in conjunction with the development of the Corporate Plan 2024-2028.

Consultation undertaken

11. The performance team have worked closely with data owners, responsible service managers and Strategic Directors to form the KPI list 2024 / 28. We have sought to identify KPIs which align with corporate plan objectives. Consideration was given to setting a baseline and reviewing benchmarking data (where applicable) for the setting of SMART targets.

Financial and resource implications

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

Legal implications

13. There are no legal implications arising from this report.

Risk assessment

14. There are no new risks arising from this report. The nature of KPI reporting means performance is scrutinised at a service level as data becomes available and any associated risks and mitigation are put in place and reported in the KPI narrative as appropriate.

Environmental / Climate and nature implications

15. There are no environmental / climate and nature implications arising from this report.

Equalities implications

16. There are no equalities implications arising from this report.

Crime and disorder implications

17. There are no crime and disorder implications arising from this report.

Data protection / Information governance / ICT implications

18. There are no data protection / information governance / ICT implications arising from this report.

Conclusion

19. Review of our key performance indicators, ultimately provides Cabinet with a sense check of progress against our corporate plan commitments. Passing the scorecard through the levels of governance outlined in our Performance Management Framework promotes accountability. We look forward to bringing back quarter 4, leading to our end of year performance report.

Appendices:

List appendices here:-
Appendix 1 – [Q3 Corporate Plan dashboard.pdf](#)

Background Papers:

Corporate performance dashboard Q3 - October to December 2024

Housing and Communities

Corporate plan priority: Helping those in our community with the greatest need

Corporate plan theme: People
 Portfolio holder(s): Cllr Steve Davies (KPI no.1-3), Cllr Dan Poole (KPI no.4)
 Overview and scrutiny panel: Housing and communities

NFDC ID	KPI Name	Desired DOT	Return Format	Freq.	Previous Period	Q3 Target	This period	RAG Status	Supporting Narrative
1	Percentage of homelessness duty cases successfully prevented	Up	%	Q	41%	>50%	48%	Amber	Preventing homelessness remains a key priority. The current private rented sector remains challenging, with several factors affecting renters. Including the limited number of rental properties within the district, changes to landlord circumstances resulting in sale of the property, increasing demands from letting agents, including rent advanced payments and rent guarantors, all creating barriers and difficulties for potential tenants. Despite these challenges in the private sector, we work hard to support clients by providing advice, and practical support.
2	Number of households in external emergency accommodation	Down	Num	Q	59	<50	48	Green	Preventing the need to use emergency accommodation (EA) remains a significant challenge with increasingly larger families often with complex needs and affordability of private sector accommodation.
3	Number of families with children under 16 in external emergency shared accommodation over 6 weeks	Down	Num	Q	7	<7	5	Green	EA for families with children is only used when no other accommodation is available in the location that the family needs. Moving families in to accommodation with no shared facilities remains a priority. We must consider the needs of the family when seeking accommodation including school/education, doctor or health facilities, family support networks, employment factors or other complex needs.
4	Number of Appletree careline services provided to customers	Up	Num	Q	3,968	4,089	3,933	Amber	Although 52 new customers joined careline services in October and November, over the same period we experienced higher monthly averages in cancellations of 59 clients, with a reduction of 118 services. Of these 59 clients, 21 were deceased and 31 moved into full time residential or nursing care placements. This is in line with seasonal expectations i.e flu etc. December in comparison, between cancellations and installations saw a positive uplift of 8 services overall.

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Corporate plan priority: Empowering our residents to live healthy, connected and fulfilling lives

Corporate plan theme: People
 Portfolio holder(s): Cllr Dan Poole (KPI no.5-10)
 Overview and scrutiny panel: Housing and communities

NFDC ID	KPI Name	Desire d DOT	Return Format	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
5	Resident perception that their quality of life is affected by the fear of crime	Down	%	Every 2 years	N/A	N/A	N/A		Data not available until completion of next resident survey.
6	Resident perception that they feel safe when outside in their local area	Up	%	Every 2 years	N/A	N/A	N/A		Data not available until completion of next resident survey.
7	Investment in and rollout of public space CCTV system	Up	£	Q	£66k	£30k	£66k		Target is cumulative. The installation plan over Q3 has enabled a partnership to be developed with a large retail store, allowing siting of cameras on their buildings, simplifying the installation process and reducing costs. This will cover locations including Holbury, Bransgore and Fordingbridge. Additional locations have been secured in Fawley, Gangwarily and Ashley. 17 cameras from the Hardley depot have interlinked with the CCTV control room and it is anticipated a further 10 live monitored cameras will be installed by end of January.
8	Number of education and awareness sessions in relation to serious crime	Neutral	Num	Q	47	Monitor	47		In quarter 3, 47 sessions were delivered to 289 attendees with participant breakdown being 55% male and 45% female.
9	Number of positive interventions in response to Public Spaces Protection Orders (1 and 2)	Neutral	Num	Q	522	Monitor	35		Quarter 3 showed a reduced number of interactions which is anticipated outside of the main holiday season. Of the 35 engagements, 2 related to fire with the remaining 33 relating to petting of animals. No interactions required escalation necessitating the issuing of any fixed penalty notices. Yearly fire data compiled for the Safer New Forest annual strategic assessment on crime and disorder, show incidents of fire have reduced over the past year since the order was approved. Further monitoring will continue to consider all aspects that have contributed to this reduction.
10	Number of cultural events and activities supported by New Forest District Council	Up	Num	Q	19	18	22		Target is cumulative. Grant for new project Suitcase Stories in partnership with Forest Forge. Resource and support shared in supporting HCT take over the Folio network and sector support function. Funding allocated to the development of ROAM arts festival, bid writer funded by NFDC at this stage.

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Corporate plan priority: Meeting housing needs

Corporate plan theme: People
 Portfolio holder(s): Cllr Steve Davies (KPI no.11-15)
 Overview and scrutiny panel: Housing and communities

NFDC ID	KPI Name	Desire d DOT	Return Format	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
11	Number of affordable social housing homes delivered by NFDC and its partners	On forecast	Num	Annually	N/A	N/A	N/A		Data last reported 2023/24 EOY position to determine a baseline figure.
12	Number of affordable council homes delivered against the 2026 target set	On forecast	Num	Annually	N/A	N/A	N/A		Data last reported 2024/25 Q1 Corporate Dashboard.
13	Percentage score for overall tenant satisfaction with the Council as a landlord, as determined in the Tenant Satisfaction Measures (TSMs)	Up	%	Annually	N/A	N/A	N/A		Data last reported 2024/25 Q1 Corporate Dashboard.
14	Number of council homes achieving Energy Performance Certification band C	Up	Num	Annually	N/A	N/A	N/A		Data last reported 2024/25 Q1 Corporate Dashboard.
15	Percentage scores for the 5 safety and compliance management Tenant Satisfaction Measures (TSMs)	Up	%	Q	99.27%	96.80%	97.67%		Our five safety and compliance management measures continue to perform very well.

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Place and Sustainability

Corporate plan priority: Shaping our place now and for future generations

Corporate plan theme: Place
 Portfolio holder(s): Cllr Derek Tipp (KPI no.16-20)
 Overview and scrutiny panel: Place and sustainability

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
16	Percentage of major planning applications determined in time	Up	%	Q	75%	85.0%	83%	Amber	Although this is flagged as amber, it should be noted that local target is set at 25% above the Government prescribed target of 60% and Q3 performance shows an increase of 8% from Q2.
17	Percentage of minor planning applications determined in time	Up	%	Q	95%	95.0%	96%	Green	Improvement on last quarter and above target.
18	Percentage of other planning applications determined in time	Up	%	Q	97%	95.00%	95%	Green	Performance is on target.
19	Percentage of allowed planning appeals	Down	%	Q	13%	<10%	60%	Red	3 appeals allowed, 2 appeals dismissed. Between October and December 2024 there were 195 decisions made, 173 granted and 22 refused.
20	The total outstanding net dwelling supply as set out in our development plan	Down	Num	Annually	N/A	N/A	N/A	Grey	Data last reported 2024/25 Q1 Corporate Dashboard.

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Corporate plan priority: Protecting our climate, coast, and natural world Corporate plan theme: Place
 Portfolio holder(s): Cllr Geoffrey Blunden (KPI no.21-24)
 Overview and scrutiny panel: Place and sustainability

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
21	Kilogrammes of non-recycled waste produced per household	Down	Kg	Q	220.9kg	342	N/A		Quarter 3 data will not be available until approx. 2 months after quarter end when returned to us from HCC. Data will be updated at a later date. Quarter 2 data has since become available and is referenced in the 'previous period' column.
22	Households using our chargeable garden waste service as a percentage of total properties in NFDC	Up	%	Q	28%	27%	29%		Target is cumulative.
23	Emissions from the council's vehicle fleet	Down	Tonnes of CO2e	Annually	N/A	Monitor	N/A		Data last reported 2023/24 EOY position to determine a baseline figure.
24	Percentage of household waste sent for recycling	Up	%	Q	39%	38.5%	N/A		Target is cumulative. Quarter 3 data will not be available until approx. 2 months after quarter end when returned to us from HCC. Data will be updated at a later date. Quarter 2 data has since become available and is referenced in the 'previous period' column.

Corporate plan priority: Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way Corporate plan theme: Place
 Portfolio holder(s): Cllr Geoffrey Blunden (KPI no.25-27)
 Overview and scrutiny panel: Place and sustainability

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
25	Number of fly-tipping incidents per 1,000 people	Down	Num	Q	3.8	<13.94	2.85		The reported figure is based on the total of 502 fly-tipping incidents occurring in Q3. (502/175,942*1000).
26	Percentage customer satisfaction with the appearance of their local area	Up	%	Every 2 years	N/A	N/A	N/A		Data not available until completion of next resident survey.
27	Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted	Up	Num	Q	21,954	23,000	25,598		Target is cumulative. Q3 figure of 3644 is low due to the short period of operation during this period before units turned off for winter. Units are not operational during winter months and are expected to be switched back on early/mid march 2025.

Corporate plan priority: Maximising the benefits of inclusive economic growth and investment

Corporate plan theme: Prosperity
 Portfolio holder(s): Cllr Derek Tipp
 Overview and scrutiny panel: Place and sustainability

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
28	Squared metres of industrial/employment land developed.	Up	Sqm	Annually	N/A	N/A	N/A		Data last reported 2024/25 Q1 Corporate Dashboard.
29	Level (£) of retained business rates (at source)	Up	£	Annually	N/A	N/A	N/A		Data last reported 2023/24 EOY position to determine a baseline figure.

Corporate plan priority: Supporting our high-quality business base and economic centres to thrive and grow

Corporate plan theme: Prosperity
 Portfolio holder(s): Cllr Geoffrey Blunden (KPI no. 30), Cllr Derek Tipp (KPI no.31)
 Overview and scrutiny panel: Place and sustainability

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
30	Resident perception of our highstreets and town centres	Up	%	Every 2 years	N/A	N/A	N/A		Data not available until completion of next resident survey.
31	Vacancies of retail premises within town/local centres	Down	%	Annually	N/A	N/A	N/A		Data last reported 2023/24 EOY position to determine a baseline figure.

Corporate plan priority: Championing skills and access to job opportunities

Corporate plan theme: Prosperity
 Portfolio holder(s): Cllr Derek Tipp (KPI no.32-33)
 Overview and scrutiny panel: Place and sustainability

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
32	Employment rate percentage of working age adults (aged 16-64)	Up	%	Annually	N/A	N/A	N/A		Figures for 2024 have not yet been released, and are not expected until May 2025. Latest data is 82.3% (2023 period) according to ONS.
33	Proportion (in percentage terms) of employee jobs with hourly pay below the living wage	Down	%	Annually	13.3% (2023)	Monitor	14.2% (2024)		Provisional 2024 data, according to ONS.

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Resources and Transformation

Corporate plan priority: Putting customers at the heart

Corporate plan theme: Future New Forest
 Portfolio holder(s): Leader Cllr Jill Cleary (KPI no. 34), Cllr Jeremy Heron (KPI no.35-36)
 Overview and scrutiny panel: Resources and transformation

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
34	Resident satisfaction with Council services	Up	%	Every 2 years	N/A	N/A	N/A		Data not available until completion of next resident survey.
35	Staff satisfaction score with NFDC ICT services	Maintain	Num	Annually	N/A	N/A	N/A		-
36	Resident satisfaction score with the quality of NFDC digital services	Maintain	Num	Annually	N/A	N/A	N/A		Data not available until completion of next resident survey.

Corporate plan priority: Being an employer of choice

Corporate plan theme: Future New Forest
 Portfolio holder(s): Leader Cllr Jill Cleary (KPI no. 37-40)
 Overview and scrutiny panel: Resources and transformation

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
37	Percentage of vacancies filled first time	Up	%	Q	88%	80%	82.5%		33 appointments were filled in the first round of recruitment.
38	Percentage staff turnover	Down	%	Annually	N/A	N/A	N/A		Data last reported 2023/24 EOY position to determine a baseline figure.
39	Average number of days sickness absence per employee	Down	Num	Q	9.78	8	9.33		Whilst we are always finding ways to reduce sickness and absence levels to meet our targets, this is of largely out of our direct control. Every step is taken to be satisfied that sickness absence is genuine, that sickness is reducing and that we are managing sickness effectively to keep this figure reducing. HR work closely with managers to apply our policies effectively to manage sickness.
40	Number of council apprenticeships	Up	Num	Annually	N/A	N/A	N/A		Data last reported 2023/24 EOY position to determine a baseline figure.

Corporate plan priority: Being financially responsible Corporate plan theme: Future New Forest
 Portfolio holder(s): Cllr Jeremy Heron (KPI no. 41-44)
 Overview and scrutiny panel: Resources and transformation

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
41	Percentage variance to Council budget +/- (General fund budget variations)	Up or Down	%	Q	0%	+/- 3%	0%		Indicative figures as at 21 January 2025, final figures will be confirmed as set out in the Financial Monitoring Report taken to Cabinet 5 February 2025.
42	Percentage variance to Housing Revenue budget +/- (HRA budget variations)	Up or Down	%	Q	0.55%	+/- 3%	-0.50%		Indicative figures as at 21 January 2025, final figures will be confirmed as set out in the Financial Monitoring Report taken to Cabinet 5 February 2025.
43	Percentage of Council Tax collected in year	Up	%	Q	57.40%	85.3%	84.96%		Target is cumulative. Some instalments have been spread to March 2025 so collection rates should be maintained come year end. We have also had a number of properties transferring from business rates to council tax as the Valuation Office Agency (VOA) have determined the property is no longer a holiday let, with bills only recently being sent and some disputing the VOA decision.
44	Percentage of Non-domestic Rates collected in year	Up	%	Q	57.50%	84.3%	84.52%		Target is cumulative.

Corporate plan priority: Designing modern and innovative services Corporate plan theme: Future New Forest
 Portfolio holder(s): Cllr Jeremy Heron (KPI no. 45-48)
 Overview and scrutiny panel: Resources and transformation

NFDC ID	KPI Name	Desire d DOT	Retur n Forma t	Freq.	Previo us Period	Q3 Target	This period	RAG Status	Supporting Narrative
45	Benefit realisation from ICT investment	Maintain	%	Every 6 Months	N/A	N/A	95.0%		(Q2 - 87.5%) Narrative for April 24 - April 25: Azure Migration project = 100% (9/9) Learning Management System (LMS) project = 86% (6/7) (Security training module is targeting go live on LMS on the 17th Jan) Direct Debit = 100% (5/5)
46	Percentage of ICT incidents resolved within SLA	Up	%	Q	98%	95%	97%		-
47	Percentage of annual ICT work programme delivered on time and on budget	Maintain	%	Q	93.33%	70%	93.33%		Narrative for April 24 - April 25: Azure Migration project = delivered on time in line with board approved project plan. Learning Management System (LMS) project = delivered on time in line with board approved project plan. Direct Debit = delivery delayed by around 1.5 months whilst transition to BAU was better prepared for within business units.
48	Percentage unscheduled downtime for critical systems	Down	%	Q	2.89%	<5%	0.16%		-

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RESOURCES AND TRANSFORMATION OVERVIEW AND SCRUTINY PANEL WORK PROGRAMME – 2025/26			
25 JUNE 2025			
Commercial and Residential Property Strategies	To receive a presentation on the performance to date in the delivery of the Commercial and Residential Property strategies.	Presentation	Alan Bethune / Andrew Mills
Solent Freeport Annual Update	To receive an update on the current position with Solent Freeport	Presentation / Written Report	Alan Bethune
Transformation Programme Update	To receive an update on the current position with the Transformation programme.	Written Report	Rebecca Drummond / Ingrid Archer
Asset Strategy Update	Update on latest position	Written Report	Alan Bethune / Paul Whittles
Task and Finish Group Arrangements for 2025	To agree the Task and Finish Group arrangements for the 2025 process	Agenda item	Andy Rogers
Information Governance and Complaints Update	To receive the complaints performance and service improvement report.	Written Report	Amanda Wilson
Annual Performance and Budget Outturn Report	To receive the Annual Performance and Budget Outturn Report	Written Report	Paul Whittles / Saqib Yasin
Devolution / LGR Update	To receive an update on the current position.	Written Report / Presentation	Alan Bethune
Performance Dashboards	To receive portfolio performance data	Written Report	Saqib Yasin
18 SEPTEMBER 2025			
Performance Dashboards	To receive portfolio performance data	Written Report	Saqib Yasin

Transformation Programme Update	To receive an update on progress with the Transformation programme.	Written Report	Rebecca Drummond / Ingrid Archer
Procurement Update	To receive an update on the Procurement service.	Written Report	Josie West
Universal Credit Update	To note the current position in regard to the Universal Credit Migration	Written Report	Ryan Stevens
Financial Strategy Task and Finish Group update	To receive an update on the actions recommended in the report of the Financial Strategy Task and Finish group received in November 2024	Written Report	Paul Whittles
Devolution / LGR Update	To receive an update on the current position.	Written Report / Presentation	Alan Bethune
20 NOVEMBER 2025			
Performance Dashboards	To receive portfolio performance data	Written Report	Saqib Yasin
Transformation Programme Update	To receive an update on progress with the Transformation programme.	Written Report	Rebecca Drummond / Ingrid Archer
Citizens Advice New Forest Update	To receive an update from Citizen's Advice New Forest on their activities and operation over the last year and to make recommendations on future funding.	Written Report	Ryan Stevens
Information Governance and Complaints Half Yearly Update	To receive the half yearly update complaints performance and service improvement report (to include the annual complaints performance and	Written Report	Amanda Wilson

	service improvement report 2023/24)		

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