

# NOTICE OF MEETING

**Meeting:** CABINET

**Date and Time:** WEDNESDAY, 2 JULY 2025, AT 10.00 AM

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

**Enquiries to:** Email: [democratic@nfdc.gov.uk](mailto:democratic@nfdc.gov.uk)  
Joe Tyler Tel: 023 8028 5982

## 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.

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## PUBLIC PARTICIPATION:

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

- (a) on items within the Cabinet'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 Friday, 27 June 2025.

**Kate Ryan**  
Chief Executive

Appletree Court, Lyndhurst, Hampshire. SO43 7PA  
[www.newforest.gov.uk](http://www.newforest.gov.uk)

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# AGENDA

## Apologies

### 1. LEADER'S ANNOUNCEMENTS

### 2. MINUTES

To confirm the minutes of the meeting held on 7 May 2025 as a correct record.

### 3. 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.

### 4. PUBLIC PARTICIPATION

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

### 5. CORPORATE PLAN KEY PERFORMANCE DATA FOR QUARTER 4 2024-2025, AND TARGET REFRESH APRIL 2025 TO MARCH 2026 (Pages 3 - 40)

### 6. ANNUAL PERFORMANCE 2024/25 (Pages 41 - 60)

### 7. FINANCIAL MONITORING REPORT – PROVISIONAL BUDGET OUTTURN (Pages 61 - 74)

### 8. ANNUAL COMPLAINTS PERFORMANCE AND SERVICE IMPROVEMENT REPORT 2024/25 (Pages 75 - 188)

### 9. HAMPSHIRE AND THE SOLENT LOCAL GOVERNMENT REORGANISATION - PROGRAMME AND RESOURCES (Pages 189 - 218)

### 10. STRATEGIC ASSET MANAGEMENT POLICY (Pages 219 - 358)

### 11. PUBLIC SPACE PROTECTION ORDER(S) REVIEW & EXTENSION (Pages 359 - 370)

### 12. ADOPTION OF THE NEW FOREST SKILLS ACTION PLAN (Pages 371 - 482)

To:

#### Councillors

Jill Cleary (Chairman)  
Steve Davies (Vice-Chairman)  
Geoffrey Blunden

#### Councillors

Jeremy Heron  
Dan Poole  
Derek Tipp

**Cabinet - 2 July 2025**

## **Corporate Plan: Key Performance Data for quarter 4 2024-2025, and target refresh April 2025 to March 2026**

Purpose	For approval
Classification	Public
Executive Summary	<p>This report presents the Key Performance Indicators (KPIs) for Quarter 4 (January to March 2025). Additionally, it includes any annually reported measures for which data is available covering the period April 2024 to March 2025.</p> <p>The report also outlines the outcomes of the target-setting refresh exercise for all KPIs that required defined targets for the 2025/2026 period.</p>
<b>Recommendation(s)</b>	<p><b>That Cabinet:</b></p> <ol style="list-style-type: none"> <li><b>1. approve the Q4 dashboard.</b></li> <li><b>2. approve the target refresh of measures.</b></li> </ol>
Reasons for recommendation(s)	<p>The Key Performance Indicators (KPIs) are a core component of our Corporate Plan 2024–2028. The processes for reporting progress and ensuring accountability against the commitments outlined in the plan are detailed in our Performance Management Framework.</p> <p>Some of our measures had targets that were initially marked as TBC (To Be Confirmed) for 2025/2026. In these cases, relevant services have been engaged to develop appropriate targets for this financial year. This is our target refresh exercise. Measures previously designated as 'monitor' have also been reviewed. The target refresh included consideration of any indicators impacted by the reprioritisation of the Corporate Plan,</p>

	which was driven by the CPC action plan and ongoing Local Government Reorganisation (LGR) discussions.
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 and approval. Having recently published and circulated data for Q1-Q3, we can now present data for Q4 covering January 2025 to March 2025, and annual data covering April 2024 to March 2025 where available.
2. As per our Performance Management Framework, following EMT approval, the dashboard is passed through to panels with associated covering reports. These reports will focus attention to the measures aligned to each panel. Further feedback from panels will be added to the covering report for Cabinet.
3. The following should be read in conjunction with the Q4 dashboard referenced in appendix 1.

## **Layout of the dashboard.**

4. This quarter again, we present a new format for the dashboard.
5. Following the sign-off of our new corporate plan, we committed to exploring improved visualisation formats to enhance the readability of our KPIs. Now, with four quarters of data integrated into the new dashboard, we have a richer dataset to work with. This allows us to better illustrate the progress of each measure and reflect on the journey so far.
6. The new format will give a rolling 4 quarters worth of data (where available), present this data in a table as well as on a graph.



7. Each KPI includes a narrative history, providing a comprehensive view of the story behind performance trends and emerging patterns. This also enables cross-examination of previously submitted narratives, including any control measures or mitigation steps taken in response to any areas of underperformance.
8. The previous 4 quarters of RAG status is provided (where available).
9. There are 48 KPIs in total presented in the dashboard. Each is organised by associated Overview and Scrutiny Panel, Corporate Plan theme and priority.
10. Data metadata is shown as follows:
  - Target – shows the desired value
  - 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
  - RAG status is as per our Performance Management Framework
    - Green, on target or above target
    - Amber, up to 10% below target
    - Red, over 10% below target

#### **Quarter 4 and 2025/2026 end of year performance.**

11. Data is presented for 32 of the KPIs.

#### **Highlights**

ID	Observation
<b>Housing and Communities</b>	
1	<p>Homelessness duty cases successfully prevented lies just below the target.</p> <p>This continues to present challenges due to the limited supply of both social and affordable private rented sector properties, especially family sized homes. To improve these figures, we have invested in training and are recruiting additional Homelessness Prevention Floating Support Workers to assist residents in sustaining tenancies.</p>

2	<p>Households in emergency accommodation. The Q4 figure is 1 number off the target and performance has remained consistent over the year.</p> <p>This is against the backdrop of families with complex needs and the affordability of private rented accommodation.</p>
3	<p>Number of families with children under 16 in external emergency shared accommodation over 6 weeks.</p> <p>From a red-rated starting point at the beginning of the year, performance has remained green for the rest of the year.</p>
4	<p>Number of Appletree Careline customers. Over 100 services were added over the quarter however numbers were impacted by customer deaths and movements to residential and nursing care.</p> <p>The current team has dedicated resources contacting and managing the switchover from analogue to digital services for existing customers. All Appletree careline literature and promotional material has been refreshed and rebranded highlighting the benefits of digital careline units, in particular highlighting the cost savings to clients no longer requiring fixed telephone lines for service delivery.</p>
8	<p>Only one education and awareness session was held (in relation to serious crime). However, 129 young people participated in the programme.</p>
10	<p>Number of cultural events and activities supported by New Forest District Council.</p> <p>The year-end cumulative is well above the target with 34 events supported.</p>
11	<p>Annual figure of social housing homes delivered by NFDC and its partners, 55 homes were completed, and this is green-rated to the target.</p>
12	<p>Annual figures of affordable council homes delivered, 36 homes were completed, and this is green-rated to the target.</p>
14	<p>Annual figure of council homes achieving the EPC rating of 'C' or above.</p> <p>198 homes were improved over the year with enhancements including the installation of new windows, heating systems,</p>

	doors, and loft insulation—contributing to warmer, greener, and more cost-effective homes for residents.  Performance is green-rated.
15	Our five safety and compliance management measures all scored 100% at year-end, covering gas, fire, asbestos, water and lift safety.
<b>Place and Sustainability</b>	
16-19	Major planning applications determined in time is above target.  Minor planning applications determine in time is just below our local target but is 22% points above the government target.  Other planning applications has performed at green-rated all year.  Six appeals were heard in the last quarter, and all were dismissed.
22	Households using our chargeable garden waste service has performed at green all year.
23	Annual figure for the emissions from the council's vehicle fleet is set at monitor. There was a reduction of 38 tonnes of CO2 emissions compared with last year.
25	The number of fly-tipping incidents has remained below target throughout the year reflecting education and preventative measures taken. The actual number of incidents was 696, with the lowest figure in the year being during Q3.
<b>Resources and Transformation</b>	
37	81% of vacancies were filled first time with this measure being reported at green throughout the year.
38	Annual figures for percentage staff turnover is 13% and is red-rated. There were 108 leavers last year. Optional exit interviews are seldom taken up and so it is not easy to understand leaver destinations.

	To gain better insight into leaver destinations, HR will carry out a data-gathering exercise and monitor the results to inform future actions.
39	Sickness remains a challenge but is amber-rated this quarter (from red in all previous quarters this year). The trend is also a downwards one.
40	Annual figure of apprenticeships is green-rated with 18 arranged against the target of 10.
43	Council tax collected in the year. Some mitigation was offered in the Q3 amber-reporting. This has now taken effect with the year-end position being above target.
44	Non-domestic rates collections has been green-rated all year and very closely aligned to the target.
45	Benefits realisation from ICT investment is performing well and continues to be green-rated.
46	ICT incidents resolved within the SLA has been green-rated through the year.
47	93% of annual ICT work programme has been delivered on time and within budget, being green-rated through the year. This measure reports in relation to the latest agreed programme plan.

### **Target Refresh summary for next year, 2025/2026**

12. The following should be read in conjunction with appendix 2 (target refresh summary).
13. During the development of the new corporate plan dashboard, The Performance and Insight Team collaborated with service teams to establish a baseline and define targets for the next four years. In some instances, a one-year target was set initially to allow for a more accurate baseline to be determined.
14. Measures requiring a target for this year (2025/2026) have been explored with colleagues and a target is now set.
15. We also endeavoured to review measures with a 'monitor' status to ensure these should remain targeted in this way.

16. Some of our measures have been impacted by changes arising from the re-prioritisation activity earlier this year resulting from our Corporate Peer Challenge action plan.
17. Some measures are impacted by changes arising from the ongoing LGR.
18. All changes are summarised in appendix 2.
19. Attention is drawn to:
  - All panels - Six measures across the dashboard were sourced from the resident survey. We are currently unable to confirm a date for the next resident survey, following a Cabinet decision made during the re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).
  - Housing and Communities – KPI 004, Appletree Careline services. Following a Cabinet decision made during the re-prioritisation exercise—prompted by the Corporate Peer Challenge action plan and the potential impacts of Local Government Reorganisation (LGR), a revised target has been approved. Starting from the baseline, the target will increase by 60 services each year.
  - Place and Sustainability – KPI 019, the percentage of allowed appeals measure has had a change of calculation. Quarterly appeals are low in number and there is often a need to contextualise this with the number of decisions made. Although not directly linked, a ratio of these two values is proposed for this measure from April 2025. We still expect numbers to be low, but the updated measure will give us a more meaningful trend pattern.
  - Place and Sustainability – KPI 022, chargeable waste. Performance was strong over the last year and so targets have been increased further over this year demonstrating growth to this income-generating service.
  - Place and Sustainability – KPI 025, Fly-tipping incidents. In a change to how data is reported, we now have a phased, cumulative quarterly target for this measure, leading up to a year-end goal of fewer than 13.94.

20. Aside these points of note, updated targets have been set where necessary, aligned with the direction established last year.

### **Overview and Scrutiny panel comments**

21. The quarter 4 dashboard and target refresh summary is presented to all three panels as follows:
- 18/06/2025 – Housing and Communities Overview and Scrutiny panel
  - 19/06/2025 – Place and Sustainability Overview and Scrutiny panel
  - 26/06/2025 – Resources and Transformation Overview and Scrutiny panel
22. The Panels undertook a thorough and engaged review of the performance measures within their remit.
23. They commended the improved layout of the report, noting that it offered clearer insight into the narrative behind performance trends and emerging patterns. The revised format also enabled more effective cross-examination of previously submitted narratives. The structure was widely regarded as clear and accessible.
24. The overall performance status was considered balanced, with a healthy distribution of green-rated measures indicating areas of strong performance.
25. The Panels also noted the actions taken as part of the target refresh exercise, including those perception-based measures that were originally intended to be informed by the resident survey, which has since been deferred.

### **Corporate plan priorities**

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

### **Options appraisal**

27. 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**

28. 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.
29. In examining the results and target-setting for 2025-26, our Executive Management Team has reviewed the content, with comments and suggestions accommodated.

## **Financial and resource implications**

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

## **Legal implications**

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

## **Risk assessment**

32. 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**

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

## **Equalities implications**

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

## **Crime and disorder implications**

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

## **Data protection / Information governance / ICT implications**

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

## **New Forest National Park implications**

37. Visibility of our measures promotes good outcomes across the land within the National Park area. Measures within our direct control furthers the interests of the National Park/National Landscape. These include making appropriate planning decisions, dwelling supply, reducing homelessness, managing interventions where there are breaches of the Public Spaces Protection Orders, promoting recycling, garden waste removal, provision of water-filling stations and taking action on fly-tipping incidents.

## **Conclusion**

38. Review of our key performance indicators ultimately provides a sense check of progress against our corporate plan commitments. Passing the dashboard through the levels of governance outlined in our Performance Management Framework promotes accountability.

### **Appendices:**

Appendix 1 – Q4 Corporate  
Dashboard.pdf


Appendix 2 – Target refresh  
summary

### **Background Papers:**





## 2024/2025 Performance Summary


KPIs are rated RAG (Red, Amber, Green) according to the performance against target.

















































 On target or above target

 Below and up to 10% deviation from the lower threshold of the target

 Over 10% deviation from the lower threshold of the target

 KPI marked TBC due to lag in data availability, context and an estimated data availability is provided in these cases.

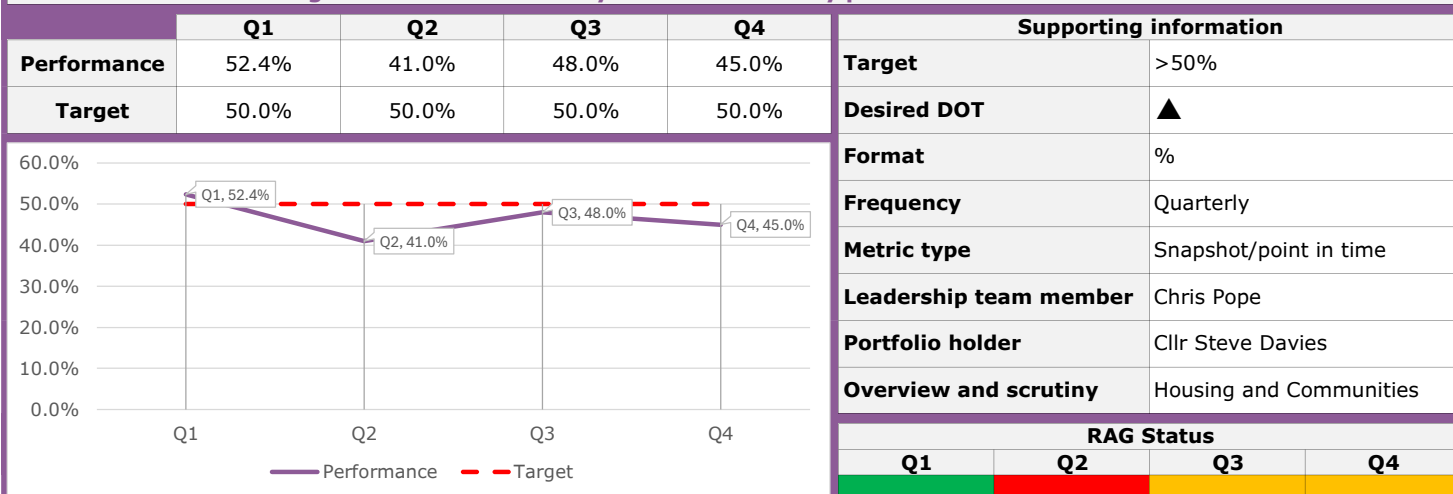
 KPI marked N/A due to performance being outside of our direct control and influence, or data not being collected during period.

PEOPLE	ID	KPI Name	RAG		
	1	Percentage of homelessness duty cases successfully prevented			
	2	Number of households in external emergency accommodation			
	3	Number of families with children under 16 in external emergency shared accommodation over 6wks			
	4	Number of Appletree careline services provided to customers			
	5	Resident perception that their quality of life is affected by the fear of crime			
	6	Resident perception that they feel safe when outside in their local area			
	7	Investment in and rollout of public space CCTV system			
	8	Number of education and awareness sessions in relation to serious crime			
	9	Number of positive interventions in response to Public Spaces Protection Orders (1 and 2)			
	10	Number of cultural events and activities supported by New Forest District Council			
	11	Number of social housing homes delivered by NFDC and its partners		Summary	
	12	Number of affordable council homes delivered against the 2026 target set		RED	0
	13	Percentage score for the overall tenant satisfaction with the Council as a landlord (TSMs)		AMBER	3
	14	Number of council homes achieving Energy Performance Certification band C		GREEN	7
	15	Percentage scores for the 5 safety and compliance management (TSMs)		TBC	0
				N/A	5
PLACE	ID	KPI Name	RAG		
	16	Percentage of major planning applications determined in time			
	17	Percentage of minor planning applications determined in time			
	18	Percentage of other planning applications determined in time			
	19	Percentage of allowed planning appeals			
	20	The total outstanding net dwelling supply as set out in our development plan			
	21	Kilogrammes of non-recycled waste produced per household			
	22	Households using our chargeable garden waste service as a percentage of total properties in NFDC		Summary	
	23	Emissions from the council's vehicle fleet		RED	0
	24	Percentage of household waste sent for recycling		AMBER	1
	25	Number of fly-tipping incidents per 1,000 people		GREEN	6
	26	Percentage customer satisfaction with the appearance of their local area		TBC	3
	27	Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted		N/A	2
PROSPERITY	ID	KPI Name	RAG		
	28	Squared metres of industrial/employment land developed		Summary	
	29	Level (£) of retained business rates (at source)		RED	0
	30	Resident perception of our highstreets and town centres		AMBER	0
	31	Vacancies of retail premises within town/local centres		GREEN	0
	32	Employment rate percentage of working age adults (aged 16-64)		TBC	3
	33	Proportion (in percentage terms) of employee jobs with hourly pay below the living wage		N/A	3
FUTURE NEW FOREST	ID	KPI Name	RAG		
	34	Resident satisfaction with Council services			
	35	Staff satisfaction score with NFDC ICT services			
	36	Resident satisfaction score with the quality of NFDC digital services			
	37	Percentage of vacancies filled first time			
	38	Percentage staff turnover			
	39	Average number of days sickness absence per employee			
	40	Number of council apprenticeships			
	41	Percentage variance to Council budget +/- (General fund budget variations)			
	42	Percentage variance to Housing Revenue budget +/- (HRA budget variations)			
	43	Percentage of Council Tax collected in year		Summary	
	44	Percentage of Non-domestic Rates collected in year		RED	3
	45	Benefit realisation from ICT investment		AMBER	1
	46	Percentage of ICT incidents resolved within SLA		GREEN	8
	47	Percentage of annual ICT work programme delivered on time and on budget		TBC	1
	48	Percentage unscheduled downtime for critical systems		N/A	2

## Housing and Communities Overview and Scrutiny panel

### People: Helping those in our community with the greatest need

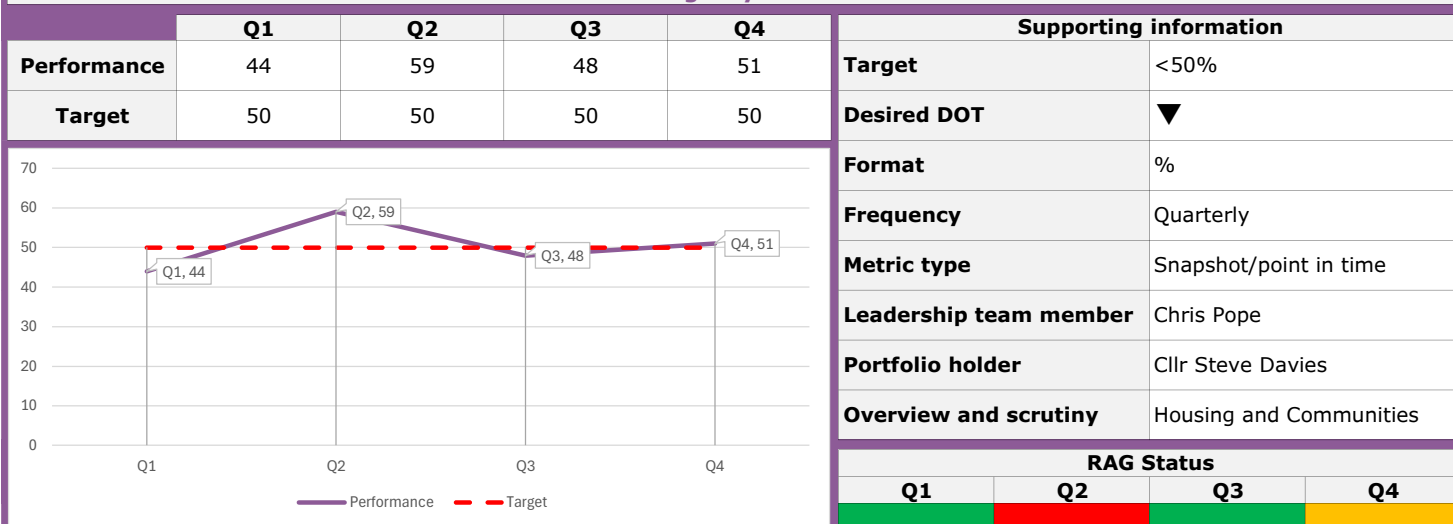
#### NFDC ID NO.1: Percentage of homelessness duty cases successfully prevented



#### Supporting narrative

<b>Q1</b>	-
<b>Q2</b>	The prevention duty is where we try to prevent people from becoming homeless by either securing their current accommodation or seeking new accommodation for them. Despite the challenges in the private sector rented sector, the team work hard to support clients by providing advice or practical support.
<b>Q3</b>	The current private rented sector remains challenging, with several factors affecting renters. Including the limited number of rental properties, 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.
<b>Q4</b>	Despite the hard work of our teams to prevent homelessness and relieve those experiencing homelessness, it is recognised that this is a challenge due to the limited supply of both social and affordable private rented sector properties, especially family sized homes. To improve these figures, we have invested in training and are recruiting additional Homelessness Prevention Floating Support Workers to assist residents in sustaining tenancies.

#### NFDC ID NO.2: Number of households in external emergency accommodation



#### Supporting narrative

<b>Q1</b>	-
<b>Q2</b>	The number of people in Emergency Accommodation (EA) fluctuates throughout the year. The reason for the jump in EA usage is due to the number of people being asked to leave family accommodation or private landlords ending tenancies. In these scenarios we try to prevent homelessness by searching for our new private accommodation or using our own Temporart Accommodation (TA) which is an enormous challenge currently as there are not many available in the price range that our clients can afford and our own TA is at capacity.
<b>Q3</b>	Preventing the need to use EA remains a significant challenge with increasingly larger families often with complex needs and affordability of private sector accommodation.
<b>Q4</b>	Despite the hard work of our teams to prevent homelessness and relieve those experiencing homelessness, it is recognised that this is a challenge due to the limited supply of both social and affordable private rented sector properties, especially family sized homes. To improve these figures, we have invested in training and are recruiting additional Homelessness Prevention Floating Support Workers to assist residents in sustaining tenancies.

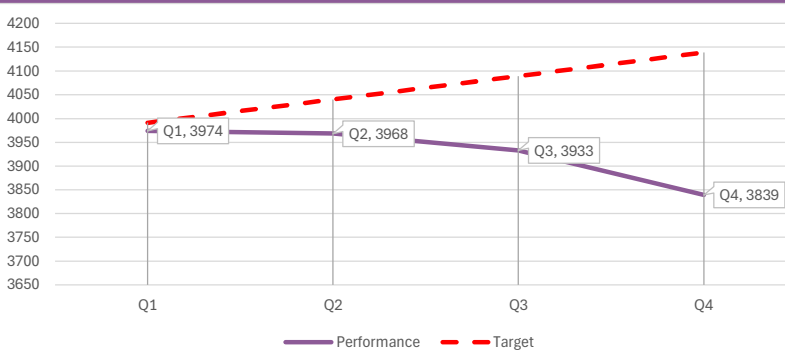
**NFDC ID NO.3: Number of families with children under 16 in external emergency shared accommodation over 6 weeks**

	Q1	Q2	Q3	Q4	Supporting information			
Performance	12	7	5	7	Target	<7		
Target	7	7	7	7	Desired DOT	▼		
<p>Q1, 12</p> <p>Q2, 7</p> <p>Q3, 5</p> <p>Q4, 7</p> <p>— Performance — Target</p>					Format	Numerical		
					Frequency	Quarterly		
					Metric type	Snapshot/point in time		
					Leadership team member	Chris Pope		
					Portfolio holder	Cllr Steve Davies		
					Overview and scrutiny	Housing and Communities		
					RAG Status			
					Q1	Q2	Q3	Q4

**Supporting narrative**

<b>Q1</b>	The main reason for the poor performance is finding suitable temporary accommodation (TA) in locations where families need to live. The team continue to work hard to find accommodation to move families to, searching our own TA stock initially. Performance has been impacted by staff availability due to the time to year and annual leave.
<b>Q2</b>	A higher number of households with large numbers of children, often with complex needs, requiring accommodation.
<b>Q3</b>	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.
<b>Q4</b>	To reduce the number of families in EA a dedicated officer is tasked with liaising with landlords to identify possible family sized accommodation and to move families as quickly as possible. Performance is in line with target.

**NFDC ID NO.4: Number of Appletree careline services provided to customers**

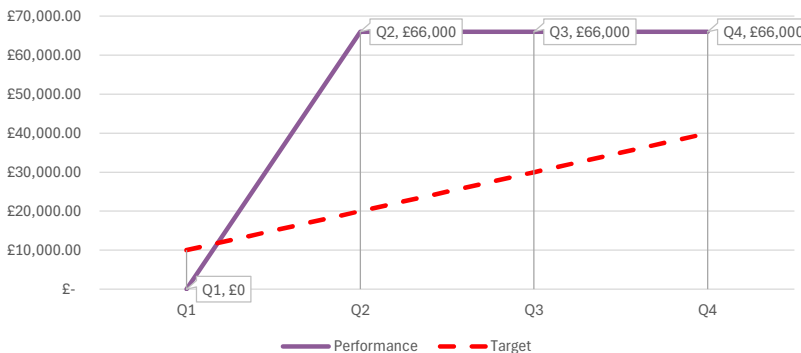
	Q1	Q2	Q3	Q4	Supporting information			
Performance	3974	3968	3933	3839	Target	Increase of 5% by 31/3/2026		
Target	3991	4040	4089	4139	Desired DOT	▲		
 <p>Q1, 3974</p> <p>Q2, 3968</p> <p>Q3, 3933</p> <p>Q4, 3839</p> <p>— Performance — Target</p>					Format	Numerical		
					Frequency	Quarterly		
					Metric type	Snapshot/point in time		
					Leadership team member	Brian Byrne		
					Portfolio holder	Cllr Dan Poole		
					Overview and scrutiny	Housing and Communities		
RAG Status								
Q1	Q2	Q3	Q4					

**Supporting narrative**

<b>Q1</b>	17 more services would bring this measure to target, it should be noted that this represents less than half a percentage point below target.
<b>Q2</b>	Due to the fluctuation in client base and services being delivered changing daily, The highest service by volume was 4004 at the end of July with 3965 at the end of August. In addition to dispersed alarms and services delivered, the service also provides fixed careline monitoring alarms in Housing Extra Care stock to 112 flats which does not form part of this data.
<b>Q3</b>	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.
<b>Q4</b>	52 new customer installations with over 100 services combined during the quarter. Whilst the growth has continued alongside existing customers being retained and upgraded to digital services, this has been impacted by the death of 29 customers and 37 moving from independent to residential/nursing care accommodation, accounting for a combined loss of 130 services. Current team focus on retention and growth, dedicated resources contacting and managing the switchover from analogue to digital services for existing customers. All Appletree careline literature and promotional material has been refreshed and rebranded highlighting the benefits of digital careline units, in particular highlighting the cost savings to clients no longer requiring fixed telephone lines for service delivery.

People: Empowering our residents to live healthy, connected and fulfilling lives					
NFDC ID NO.5: Resident perception that their quality of life is affected by the fear of crime					
	2022/3	2024/5	Supporting information		
Performance	24.5%	N/A	Target	20%	
Target	N/A	N/A	Desired DOT	▼	
<b>Supporting narrative</b>  The scheduled resident survey was not conducted this year due to the pre-election sensitivity period preceding the general election in 2024, which impacted our ability to carry out this insight. As a result, the necessary data for this measure is not available for the period.  Additionally, we are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the Corporate Plan Priority re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).			Format	%	
			Frequency	Upon completion of resident survey	
			Metric type	Snapshot/point in time	
			Leadership team member	Rebecca Drummond	
			Portfolio holder	Cllr Dan Poole	
			Overview and scrutiny	Housing and Communities	
			RAG Status		
2022/3		2024/5			
N/A		N/A			
NFDC ID NO.6: Resident perception that they feel safe when outside in their local area					
	2022/3	2024/5	Supporting information		
Performance	85.0%	N/A	Target	85%	
Target	N/A	N/A	Desired DOT	▲	
<b>Supporting narrative</b>  The scheduled resident survey was not conducted this year due to the pre-election sensitivity period preceding the general election in 2024, which impacted our ability to carry out this insight. As a result, the necessary data for this measure is not available for the period.  Additionally, we are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the Corporate Plan Priority re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).			Format	%	
			Frequency	Upon completion of resident survey	
			Metric type	Snapshot/point in time	
			Leadership team member	Rebecca Drummond	
			Portfolio holder	Cllr Dan Poole	
			Overview and scrutiny	Housing and Communities	
			RAG Status		
2022/3		2024/5			
N/A		N/A			

**NFDC ID NO.7: Investment in and rollout of public space CCTV system**

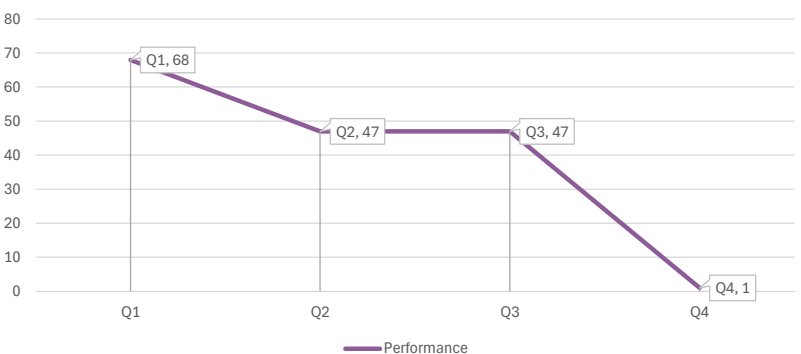
	Q1	Q2	Q3	Q4	Supporting information			
Performance	£0	£66,000	£66,000	£66,000	Target	£40,000		
Target	£10,000	£20,000	£30,000	£40,000	Desired DOT	▲		
 <p>£70,000.00 £60,000.00 £50,000.00 £40,000.00 £30,000.00 £20,000.00 £10,000.00 £-</p> <p>Q1 Q2 Q3 Q4</p> <p>— Performance — Target</p>					Format	£		
					Frequency	Quarterly		
					Metric type	Cumulative/year to date		
					Leadership team member	Brian Byrne		
					Portfolio holder	Cllr Dan Poole		
					Overview and scrutiny	Housing and Communities		
					RAG Status			
					Q1	Q2	Q3	Q4

**Supporting narrative**

<b>Q1</b>	The CCTV expansion report was reviewed at panel on July 17th, receiving full support prior to full cabinet in August. Once agreed at Cabinet the programme of installation can commence.
<b>Q2</b>	66K has been spent on securing 10 x 4g PTZ cameras for rural locations which also includes transmission costs for 2 years. A camera has been installed in Calshot Play park as part of the upgrade to St. Georges Hall providing 24 hour monitoring, live linked to the control room.
<b>Q3</b>	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.
<b>Q4</b>	Following full handover of the Hardley Depot, A further 10 cameras went live, increasing the total to 28. Fire and security alarms are also live monitored within the main CCTV control room. Electrification works have been confirmed on all proposed public space sites with these being prepared for full camera installation. Terms for a further location on a retail store were agreed in Brockenhurst and a site in Ringwood. Securing these locations provides optimum placement for monitoring whilst negating local disruption.

**NFDC ID NO.8: Number of education and awareness sessions in relation to serious crime**

	Q1	Q2	Q3	Q4	Supporting information	
Performance	68	47	47	1	Target	Monitor
Target	MONITOR	MONITOR	MONITOR	MONITOR	Desired DOT	N/A



80  
70  
60  
50  
40  
30  
20  
10  
0

Q1 Q2 Q3 Q4

— Performance

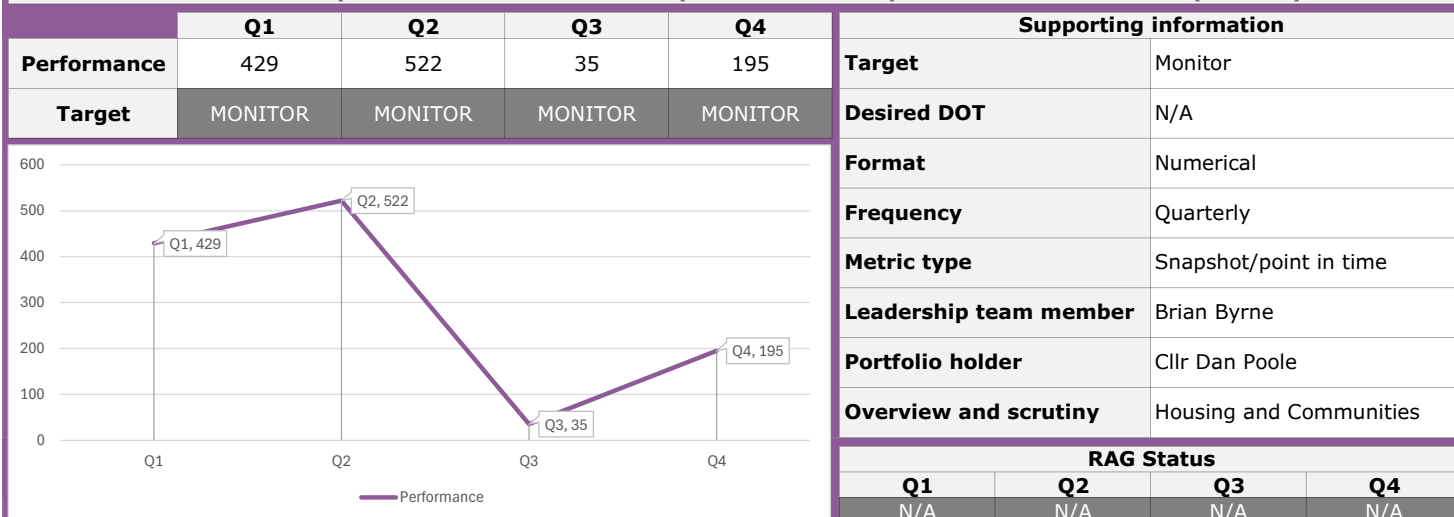
	Q1	Q2	Q3	Q4
Performance	68	47	47	1

Supporting information	
Format	Numerical
Frequency	Quarterly
Metric type	Snapshot/point in time
Leadership team member	Brian Byrne
Portfolio holder	Cllr Dan Poole
Overview and scrutiny	Housing and Communities

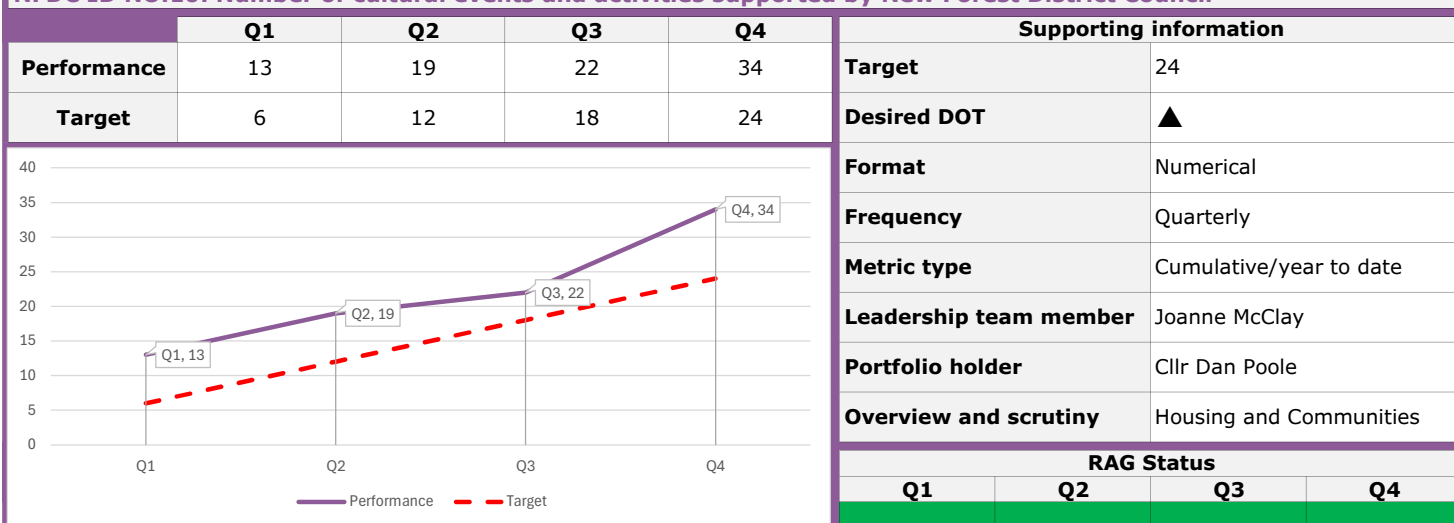
RAG Status			
Q1	Q2	Q3	Q4
N/A	N/A	N/A	N/A

**Supporting narrative**

<b>Q1</b>	Preparation work has commenced on the roll out of a district wide, weapons intervention programme facilitated by the Community Safety Team. Following engagement with the Head Teachers network and youth engagement services, we are receiving nominations for training in the autumn of 2024.
<b>Q2</b>	Sessions delivered on weapons prevention between July 1st and September 30th included workshops and assemblies to 130 young people and 47 sessions delivered to 15 individual participants on a 1:1 basis. Lower figure of 47 sessions confirmed and awaiting final number of sessions delivered to 130 people. Final numbers delayed and will be updated at a later date once clarified with partners.
<b>Q3</b>	47 sessions were delivered to 289 attendees with participant breakdown being 55% male and 45% female.
<b>Q4</b>	129 young people participated in a prevention of weapons education programme. Over the past 12 months, weapons prevention education has been delivered to 563 young people within either group or 1-2-1 sessions across the district.

**NFDC ID NO.9: Number of positive interventions in response to Public Spaces Protection Orders (1 and 2)****Supporting narrative**

<b>Q1</b>	In the first quarter, there were 429 interventions with the public relating to PSPO 1 and 2. 313 engagements related to animals and 116 related to fire. 1 fixed penalty notice was issued.
<b>Q2</b>	Quarterly data is collated by Forestry England and includes data from the National Parks Authority and the Verderers.
<b>Q3</b>	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.
<b>Q4</b>	Quarter 4 period resulted in 31 reports to services regarding concerns of compliance with the orders with Wednesday being the busiest of days. Direct engagement was held with 195 people, with 180 relating to animals and 15 to fire.

**NFDC ID NO.10: Number of cultural events and activities supported by New Forest District Council****Supporting narrative**

<b>Q1</b>	8 projects funded by NFDC, 3 projects managed and led by NFDC. Projects include managing Folio, and supporting Culture in Common, funding projects such as the BBC Gardeners World, Elevate creative work experience programme, Future First youth climate play production, creative drop-ins at the Totton creative hub and a new LGBTQ+ artist hub.
<b>Q2</b>	This quarter we have funded the development of Suitcase Stories, a school based theatre project via SPF funding. As well as providing funding for improved music production at this years New Forest Pride in Lymington. We have also provided project support to Waterside Arts Festival, Artful Scribe's Play on Words festival in New Milton, and the NFDC Litter Nest project. We have also lead Folio in developing their new project ROAM, as well as continued funding, project support and leadership on multiple projects from Q1.
<b>Q3</b>	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.
<b>Q4</b>	5 Projects supported this quarter via SPF are Nightjar, Folio training programme, Folio transition support, Milford on Sea beach event and CODA celebration event. 6 cultural projects were supported by the Community Grants programme in 24/25. 1 project has received CIL funding of £142,000 to improve the access to cultural facilities, locally.

People: Meeting housing needs

NFDC ID NO.11: Number of affordable homes delivered by NFDC and its partners

	2023/4	2024/5	Supporting information	
Performance	133	188	Target	186
Target	N/A	186	Desired DOT	On forecast
<b>Supporting narrative</b>  A total of 55 homes (including NFDC and other providers) completed during 2024/25.			Format	Numerical
			Frequency	Annually
			Metric type	Cumulative/year to date
			Leadership team member	Tim Davis
			Portfolio holder	Cllr Steve Davies
			Overview and scrutiny	Housing and Communities
			RAG Status	
			2023/4	2024/5
			N/A	

NFDC ID NO.12: Number of affordable council homes delivered against the 2026 target set

	2023/4	2024/5	Supporting information	
Performance	339	375	Target	373
Target	N/A	373	Desired DOT	On forecast
<b>Supporting narrative</b>  36 additional council homes were completed in 2024/25 towards the 2026 target.			Format	Numerical
			Frequency	Annually
			Metric type	Cumulative/year to date
			Leadership team member	Tim Davis
			Portfolio holder	Cllr Steve Davies
			Overview and scrutiny	Housing and Communities
			RAG Status	
			2023/4	2024/5
			N/A	

NFDC ID NO.13: Percentage score for overall tenant satisfaction with the Council as a landlord, as determined in the Tenant Satisfaction Measures (TSMs)

	2023/4	2024/5	Supporting information	
Performance	81.1%	N/A*	Target	81.6%
Target	N/A	81.6%	Desired DOT	▲
<b>Supporting narrative</b>  *Final satisfaction figures for 2024/5 will be published in the 2025/6 Q1 dashboard along with the final publication of our TSM scores.			Format	%
			Frequency	Annually
			Metric type	Snapshot/point in time
			Leadership team member	Kirsty Farmer
			Portfolio holder	Cllr Steve Davies
			Overview and scrutiny	Housing and Communities
			RAG Status	
			2023/4	2024/5
			N/A	N/A

NFDC ID NO.14: Number of council homes achieving Energy Performance Certification band C				
	2023/4	2024/5	Supporting information	
Performance	2546	2744	Target	2646
Target	N/A	2646	Desired DOT	▲
<b>Supporting narrative</b>  Significant progress was achieved in improving housing quality and energy efficiency over the last year.  98 homes were improved under the Government’s Social Housing Decarbonisation Fund (SHDF). Additionally, a further 100 were improved from an EPC rating of D to a more energy-efficient band C through routine maintenance and repairs.  These enhancements included the installation of new windows, heating systems, doors, and loft insulation all contributing to warmer, greener, and more cost-effective homes for residents.			Format	Numerical
			Frequency	Annually
			Metric type	Cumulative/year to date
			Leadership team member	Sophie Tuffin
			Portfolio holder	CLlr Steve Davies
			Overview and scrutiny	Housing and Communities
			RAG Status	
			2023/4	2024/5
			N/A	

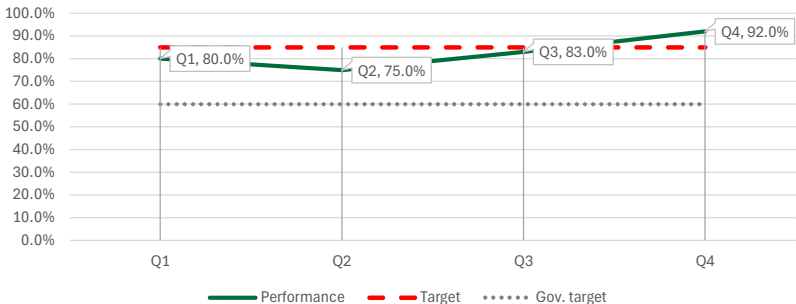
NFDC ID NO.15: Percentage scores for the 5 safety and compliance management Tenant Satisfaction Measures (TSMs)																					
	Q1	Q2	Q3	Q4	Supporting information																
Performance	96.85%	99.27%	97.67%	100.00%	Target	96.80%															
Target	96.80%	96.80%	96.80%	96.80%	Desired DOT	▲															
<table><caption>Percentage scores for the 5 safety and compliance management Tenant Satisfaction Measures (TSMs)</caption><tr><th>Quarter</th><th>Performance (%)</th><th>Target (%)</th></tr><tr><td>Q1</td><td>96.85%</td><td>96.80%</td></tr><tr><td>Q2</td><td>99.27%</td><td>96.80%</td></tr><tr><td>Q3</td><td>97.67%</td><td>96.80%</td></tr><tr><td>Q4</td><td>100.00%</td><td>96.80%</td></tr></table>					Quarter	Performance (%)	Target (%)	Q1	96.85%	96.80%	Q2	99.27%	96.80%	Q3	97.67%	96.80%	Q4	100.00%	96.80%	Format	%
					Quarter	Performance (%)	Target (%)														
					Q1	96.85%	96.80%														
					Q2	99.27%	96.80%														
					Q3	97.67%	96.80%														
Q4	100.00%	96.80%																			
Frequency	Quarterly																				
Metric type	Snapshot/point in time																				
Leadership team member	Sophie Tuffin																				
Portfolio holder	Cllr Steve Davies																				
Overview and scrutiny	Housing and Communities																				
RAG Status																					
Q1	Q2	Q3	Q4																		
Supporting narrative																					
Q1	-																				
Q2	High compliance rates for the end of September for all 5 safety and compliance management measures.																				
Q3	Our 5 safety and compliance management measures continue to perform very well.																				
Q4	Our year-end results show strong performance across all five of our safety and compliance management measures, each achieving 100%. These final figures will be submitted to the regulator as part of our annual return.																				



Place and Sustainability Overview and Scrutiny panel

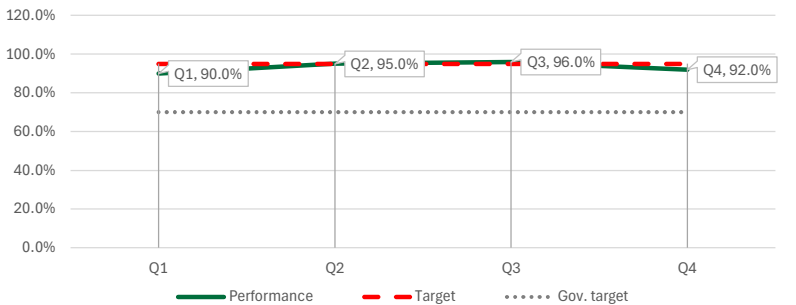
Place: Shaping our place for now and for future generations

NFDC ID NO.16: Percentage of major planning applications determined in time

	Q1	Q2	Q3	Q4	Supporting information	
Performance	80.0%	75.0%	83.0%	92.0%	Target	85.0%
Target	85.0%	85.0%	85.0%	85.0%	Desired DOT	▲
Gov. target	60.0%	60.0%	60.0%	60.0%	Format	%
					Frequency	Quarterly
					Metric type	Snapshot/point in time
					Leadership team member	Mark Wyatt
					Portfolio holder	Cllr Derek Tipp
					Overview and scrutiny	Place and Sustainability
					RAG Status	
					Q1	Q2

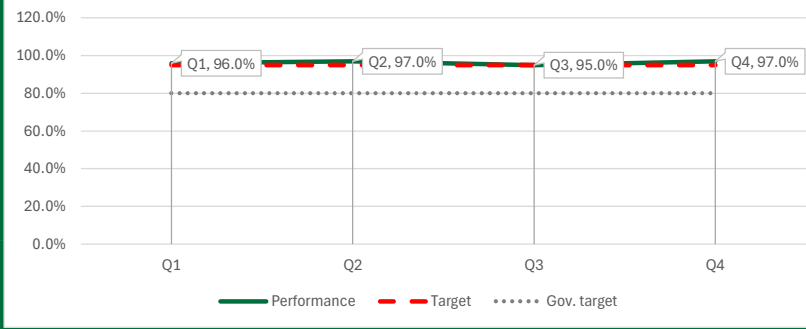
Supporting narrative	
Q1	Although flagged as amber, should be noted the local target is set at 25% above the Government target of 60%.
Q2	The prevention duty is where we try to prevent people from becoming homeless by either securing their current accommodation or seeking new accommodation for them. Despite the challenges in the private sector rented sector, the team work hard to support clients by providing advice or practical support.
Q3	Although flagged as amber, should be noted the local target is set at 25% above the Government target of 60%.
Q4	Performance exceeds both local and Government targets.

NFDC ID NO.17: Percentage of minor planning applications determined in time

	Q1	Q2	Q3	Q4	Supporting information	
Performance	90.0%	95.0%	96.0%	92.0%	Target	95.0%
Target	95.0%	95.0%	95.0%	95.0%	Desired DOT	▲
Gov. target	70.0%	70.0%	70.0%	70.0%	Format	%
					Frequency	Quarterly
					Metric type	Snapshot/point in time
					Leadership team member	Mark Wyatt
					Portfolio holder	Cllr Derek Tipp
					Overview and scrutiny	Place and Sustainability
					RAG Status	
					Q1	Q2

Supporting narrative	
Q1	Although flagged as amber, should be noted the local target is set at 25% above the Government target of 70%.
Q2	Improvement on last quarter and above target.
Q3	Improvement on last quarter and above target.
Q4	Although flagged as amber, should be noted the local target is set at 25% above the Government target of 70%. Our performance consistently exceeds Government set targets.

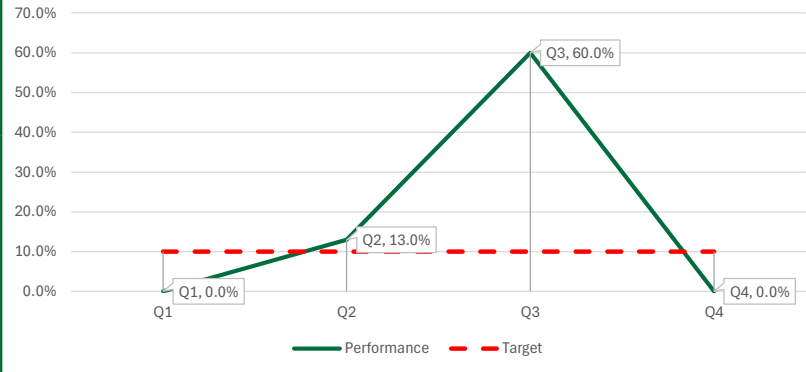
NFDC ID NO.18: Percentage of other planning applications determined in time

	Q1	Q2	Q3	Q4	Supporting information	
Performance	96.0%	97.0%	95.0%	97.0%	Target	95.0%
Target	95.0%	95.0%	95.0%	95.0%	Desired DOT	▲
Gov. target	80.0%	80.0%	80.0%	80.0%	Format	%
					Frequency	Quarterly
					Metric type	Snapshot/point in time
					Leadership team member	Mark Wyatt
					Portfolio holder	CLlr Derek Tipp
					Overview and scrutiny	Place and Sustainability
RAG Status						
Q1		Q2	Q3	Q4		

Supporting narrative

Q1	The local target is set at 15% above the Government prescribed target of 80%.
Q2	Performance is on target.
Q3	Performance is on target.
Q4	Performance exceeds both local and Government targets.

NFDC ID NO.19: Percentage of allowed planning appeals

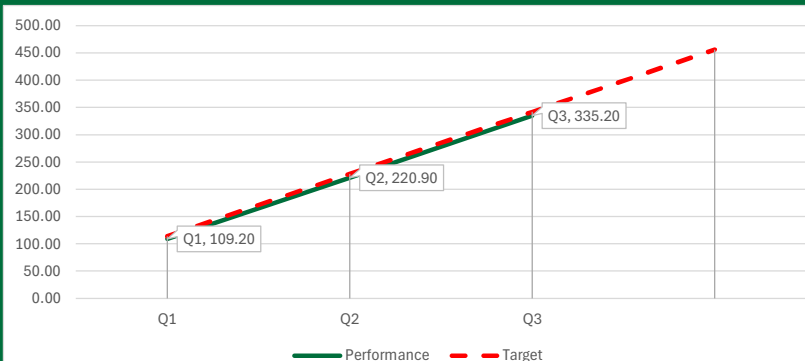
	Q1	Q2	Q3	Q4	Supporting information	
Performance	0.0%	13.0%	60.0%	0.0%	Target	<10%
Target	10.0%	10.0%	10.0%	10.0%	Desired DOT	▼
					Format	%
					Frequency	Quarterly
					Metric type	Snapshot/point in time
					Leadership team member	Mark Wyatt
					Portfolio holder	CLlr Derek Tipp
					Overview and scrutiny	Place and Sustainability
RAG Status						
Q1		Q2	Q3	Q4		

Supporting narrative

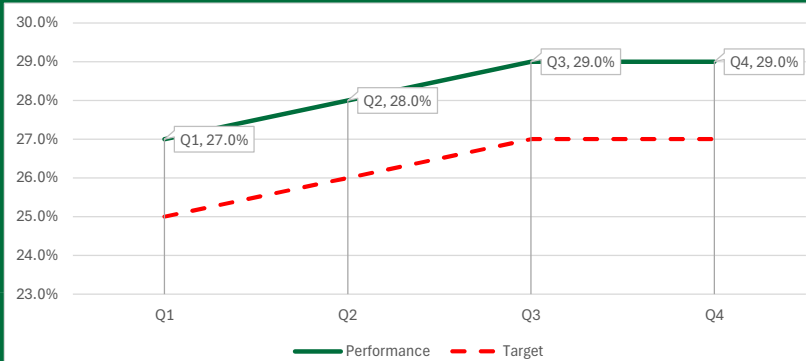
Q1	No planning appeals were allowed.
Q2	Of 15 appeals during the quarter, 2 were allowed and 13 dismissed.
Q3	3 appeals allowed, 2 appeals dismissed. Between October and December 2024 there were 195 decisions made, 173 granted and 22 refused.
Q4	6 appeals, all dismissed.

NFDC ID NO.20: The total outstanding net dwelling supply as set out in our development plan				
	2023/4	2024/5	Supporting information	
Performance	8443	N/A*	Target	8241
Target	N/A	8241	Desired DOT	▼
<b>Supporting narrative</b>  2024/25 target has been determined using targeted 7720 performance and outturn shortfall of 521 as at the end of the previous financial year 2023/4.  *2024/5 data likely to be available July/August 2025.			Format	Num
			Frequency	Annually
			Metric type	Snapshot/point in time
			Leadership team member	Tim Guymer
			Portfolio holder	CLlr Derek Tipp
			Overview and scrutiny	Place and Sustainability
			RAG Status	
			2023/4	2024/5
			N/A	N/A*

Place: Protecting our climate, coast and natural world

NFDC ID NO.21: Kilogrammes of non-recycled waste produced per household								
	Q1	Q2	Q3	Q4	Supporting information			
Performance	109.20	220.90	335.20	N/A*	Target	456		
Target	114.00	228.00	342.00	456.00	Desired DOT	▼		
					Format	kg		
					Frequency	Quarterly		
					Metric type	Cumulative/year to date		
					Leadership team member	Liz Mockridge		
					Portfolio holder	Cllr Geoffrey Blunden		
					Overview and scrutiny	Place and Sustainability		
					RAG Status			
					Q1	Q2	Q3	Q4
								N/A*
Supporting narrative								
Q1	-							
Q2	-							
Q3	-							
Q4	*Quarter 4 data will not be available until approx. 2 months after quarter end when returned to us from HCC.							

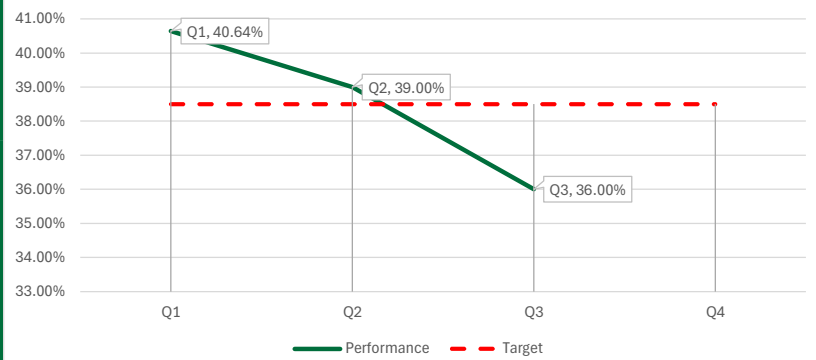
NFDC ID NO.22: Households using our chargeable garden waste service as percentage of total properties in NFDC

	Q1	Q2	Q3	Q4	Supporting information	
Performance	27.0%	28.0%	29.0%	29.0%	Target	27%
Target	25.0%	26.0%	27.0%	27.0%	Desired DOT	▲
					Format	%
					Frequency	Quarterly
					Metric type	Cumulative/year to date
					Leadership team member	Liz Mockeridge
					Portfolio holder	Cllr Geoffrey Blunden
					Overview and scrutiny	Place and Sustainability
					RAG Status	
					Q1	Q2
					Q3	Q4
Supporting narrative						
Q1	-					
Q2	-					
Q3	-					
Q4	End of year performance exceeds target.					

NFDC ID NO.23: Emissions from the council's vehicle fleet

	2023/4	2024/5	Supporting information	
Performance	1696	1658	Target	Monitor
Target	MONITOR	MONITOR	Desired DOT	▼
<p>Supporting narrative</p> <p>There was a reduction of 38 tonnes of CO2 emissions compared with the previous year.</p> <p>A proportion of this reduction is attributed to the trial of HVO (Hydrotreated Vegetable Oil - renewable fuel source). The quantity of fuel drawn was similar when compared to last year (670,709 litres 2024/5, 675,357 litres 2023/24). This 4,648 litre reduction equates to 11 tonnes CO2 emissions.</p> <p>The cost of HVO is 16 pence per litre higher than diesel based on figures from our neighbouring authorities, which would increase cost of fuel by £107K per annum. Medium term a further reduction in CO2 emissions would be made at a higher financial cost to NFDC.</p>			Format	Tonnes of CO2e
			Frequency	Annual
			Metric type	Snapshot/point in time
			Leadership team member	Chris Noble
			Portfolio holder	Cllr Geoffrey Blunden
			Overview and scrutiny	Place and Sustainability
			RAG Status	
			2023/4	2024/5
			N/A	N/A

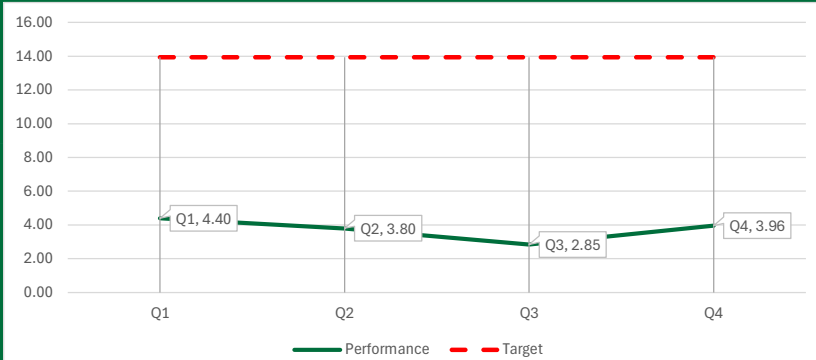
NFDC ID NO.24: Percentage of household waste sent for recycling

	Q1	Q2	Q3	Q4	Supporting information	
Performance	40.64%	39.00%	36.00%	N/A*	Target	38.50%
Target	38.50%	38.50%	38.50%	38.50%	Desired DOT	▲
					Format	%
					Frequency	Quarterly
					Metric type	Snapshot/point in time
					Leadership team member	Liz Mockeridge
					Portfolio holder	CLlr Geoffrey Blunden
					Overview and scrutiny	Place and Sustainability
					RAG Status	
		Q1	Q2	Q3	Q4	
						N/A*

Supporting narrative	
Q1	The increase in recycling rate is mostly due to the increased tonnages of garden waste collected with the move to wheeled bins. This will be influenced by seasonal garden growth so may not continue to remain this high.
Q2	-
Q3	The decrease in quarter 3 is likely due to the seasonal nature of the garden waste service and the reduction in collected tonnages over the winter months.
Q4	*Quarter 4 data will not be available until approx. 2 months after quarter end when returned to us from HCC.

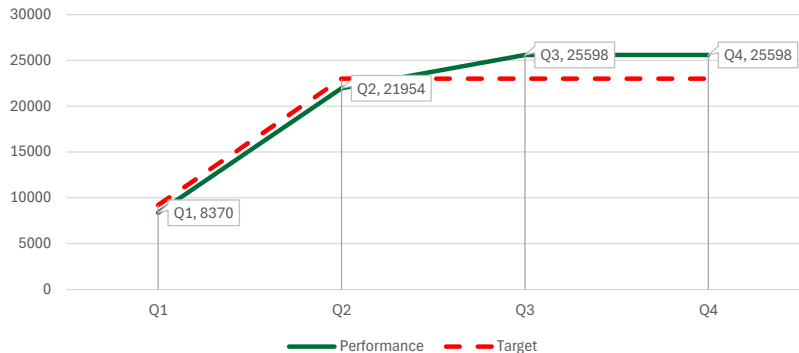
Place: Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way

NFDC ID NO.25: Number of fly-tipping incidents per 1,000 people (total population 175,942)

	Q1	Q2	Q3	Q4	Supporting information	
Performance	4.40	3.80	2.85	3.96	Target	13.94
Target	13.94	13.94	13.94	13.94	Desired DOT	▼
					Format	Numerical
					Frequency	Quarterly
					Leadership team member	Snapshot/point in time
					Data owner	Chris Noble
					Portfolio holder	CLlr Geoffrey Blunden
					Overview and scrutiny	Place and Sustainability
					RAG Status	
		Q1	Q2	Q3	Q4	

Supporting narrative	
Q1	The reported figure is based on the total of 775 fly-tipping incidents occurring in Q1.
Q2	The reported figure is based on the total of 670 fly-tipping incidents occurring in Q2.
Q3	The reported figure is based on the total of 502 fly-tipping incidents occurring in Q3.
Q4	The reported figure is based on the total of 696 fly-tipping incidents occurring in Q4.

NFDC ID NO.26: Percentage customer satisfaction with the appearance of their local area				
	2022/3	2024/5	Supporting information	
Performance	N/A	N/A	Target	75%
Target	N/A	75.0%	Desired DOT	▲
<b>Supporting narrative</b> <p>The scheduled resident survey was not conducted this year due to the pre-election sensitivity period preceding the general election in 2024, which impacted our ability to carry out this insight. As a result, the necessary data for this measure is not available for the period.</p> <p>Additionally, we are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the Corporate Plan Priority re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).</p>			Format	%
			Frequency	Upon completion of resident survey
			Metric type	Snapshot/point in time
			Leadership team member	Rebecca Drummond
			Portfolio holder	Cllr Geoffrey Blunden
			Overview and scrutiny	Place and Sustainability
			RAG Status	
			2022/3	2024/5
			N/A	N/A

NFDC ID NO.27: Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted						
	Q1	Q2	Q3	Q4	Supporting information	
Performance	8370	21954	25598	25598	Target	23,000
Target	9200	23000	23000	23000	Desired DOT	▲
 <p>Q1, 8370      Q2, 21954      Q3, 25598      Q4, 25598</p> <p>— Performance    - - - Target</p>					Format	Numerical
					Frequency	Quarterly
					Metric type	Cumulative/year to date
					Leadership team member	Chris Noble
					Portfolio holder	Cllr Geoffrey Blunden
					Overview and scrutiny	Place and Sustainability
					RAG Status	
Q1		Q2	Q3	Q4		
Supporting narrative						
Q1	Cooler weather and lower visitor numbers than usual throughout spring/early summer. 3 water meters not registering.					
Q2	As above.					
Q3	Short period of operation during Q3 before units turned off for winter. Units are not operational during winter months.					
Q4	Units are not operational during the winter months and therefore there is no additional data available for Q4.					

Place and Sustainability Overview and Scrutiny panel					
Prosperity: Maximising the benefits of inclusive economic growth and investment					
NFDC ID NO.28: Squared metres of industrial/employment land developed					
	2023/4	2024/5	Supporting information		
Performance	21,209	N/A*	Target	Monitor	
Target	MONITOR	MONITOR	Desired DOT	▲	
<b>Supporting narrative</b>  *2024/5 data likely to be available July/August 2025.			Format	Sqm	
			Frequency	Annually	
			Metric type	Snapshot/point in time	
			Leadership team member	Tim Guymer	
			Portfolio holder	Cllr Derek Tipp	
			Overview and scrutiny	Place and Sustainability	
			RAG Status		
			2023/4	2024/5	
N/A			N/A		
NFDC ID NO.29: Level (£) of retained business rates (at source)					
	2023/4	2024/5	Supporting information		
Performance	£0	£0	Target	£0	
Target	N/A	£0	Desired DOT	▲	
<b>Supporting narrative</b>  To date, £0 in retained business rates from Solent Freeport activity is recorded which is as expected at this stage.			Format	£	
			Frequency	Annually	
			Metric type	Snapshot/point in time	
			Leadership team member	Ryan Stevens	
			Portfolio holder	Cllr Derek Tipp	
			Overview and scrutiny	Place and Sustainability	
			RAG Status		
			2023/4	2024/5	
N/A			N/A		
Prosperity: Supporting our high-quality business base and economic centres to thrive and grow					
NFDC ID NO.30: Resident perception of our highstreets and town centres					
	2022/3	2024/5	Supporting information		
Performance	N/A	N/A	Target	82.5%	
Target	N/A	82.5%	Desired DOT	▲	
<b>Supporting narrative</b>  The scheduled resident survey was not conducted this year due to the pre-election sensitivity period preceding the general election in 2024, which impacted our ability to carry out this insight. As a result, the necessary data for this measure is not available for the period.  Additionally, we are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the Corporate Plan Priority re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).			Format	%	
			Frequency	Upon completion of resident survey	
			Metric type	Snapshot/point in time	
			Leadership team member	Rebecca Drummond	
			Portfolio holder	Cllr Geoffrey Blunden	
			Overview and scrutiny	Place and Sustainability	
			RAG Status		
			2022/3	2024/5	
N/A			N/A		

NFDC ID NO.31: Vacancies of retail premises within town/local centres				
	2023/4	2024/5	Supporting information	
Performance	10%	N/A*	Target	Monitor
Target	MONITOR	MONITOR	Desired DOT	▼
Supporting narrative  *2024/5 data likely to be available July/August 2025.			Format	%
			Frequency	Annually
			Metric type	Snapshot/point in time
			Leadership team member	Tim Guymer
			Portfolio holder	CLlr Derek Tipp
			Overview and scrutiny	Place and Sustainability
			RAG Status	
			2023/4	2024/5
			N/A	N/A

Prosperity: Championing skills and access to job opportunities

NFDC ID NO.32: Employment rate percentage of working age adults (aged 16-64)				
	2023	2024	Supporting information	
Performance	82.3%	N/A*	Target	Monitor
Target	MONITOR	MONITOR	Desired DOT	▲
Supporting narrative  *Figures for 2024 have not yet been released, and are not expected until 2025/6.  Latest data is 82.3% (2023 period) according to ONS.			Format	%
			Frequency	Annually
			Metric type	Snapshot/point in time
			Leadership team member	Jeannie Satchell
			Portfolio holder	CLlr Derek Tipp
			Overview and scrutiny	Place and Sustainability
			RAG Status	
			2023	2024
			N/A	N/A

NFDC ID NO.33: Proportion (in percentage terms) of employee jobs with hourly pay below the living wage				
	2023	2024	Supporting information	
Performance	13.30%	14.20%	Target	Monitor
Target	MONITOR	MONITOR	Desired DOT	▼
Supporting narrative  Provisional 2024 data, according to ONS.			Format	%
			Frequency	Annually
			Metric type	Snapshot/point in time
			Leadership team member	Jeannie Satchell
			Portfolio holder	CLlr Derek Tipp
			Overview and scrutiny	Place and Sustainability
			RAG Status	
			2023	2024
			N/A	N/A



## Resources and Transformation Overview and Scrutiny panel

### Future New Forest: Putting our customers at the heart

#### NFDC ID NO.34: Resident satisfaction with council services

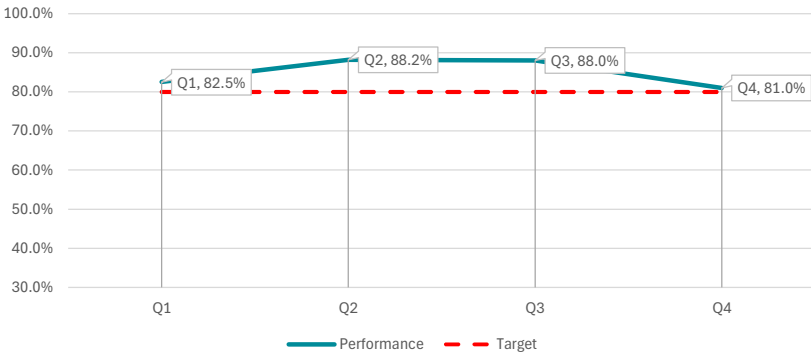
	2022/3	2024/5	Supporting information	
Performance	62.0%	N/A	Target	65.0%
Target	N/A	65.0%	Desired DOT	▲
<b>Supporting narrative</b>  The scheduled resident survey was not conducted this year due to the pre-election sensitivity period preceding the general election in 2024, which impacted our ability to carry out this insight. As a result, the necessary data for this measure is not available for the period.  Additionally, we are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the Corporate Plan Priority re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).			Format	%
			Frequency	Upon completion of resident survey
			Metric type	Snapshot/point in time
			Leadership team member	Rebecca Drummond
			Portfolio holder	Leader Cllr Jill Cleary
			Overview and scrutiny	Resources and Transformation
			RAG Status	
			2022/3	2024/5
			N/A	N/A

#### NFDC ID NO.35: Staff satisfaction score with NFDC ICT services

	2023/4	2024/5	Supporting information	
Performance	N/A	N/A*	Target	70%
Target	70.0%	70.0%	Desired DOT	Maintain
<b>Supporting narrative</b>  *Data not available until completion of next staff survey due to take place in Q1 2025/26.			Format	%
			Frequency	Annually
			Metric type	Snapshot/point in time
			Leadership team member	Rich Bird/Kim Gray
			Portfolio holder	Cllr Jeremy Heron
			Overview and scrutiny	Resources and Transformation
			RAG Status	
			2023/4	2024/5
			N/A	N/A

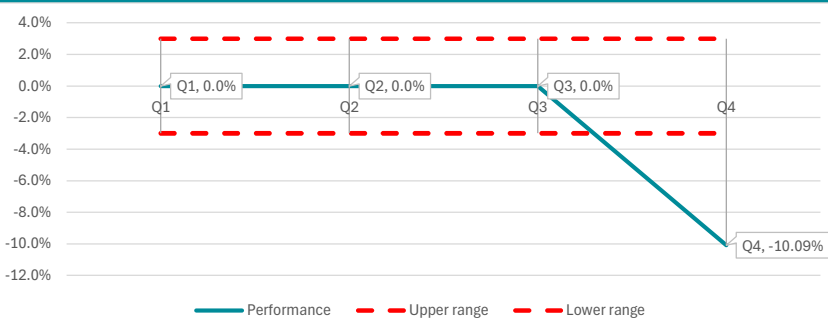
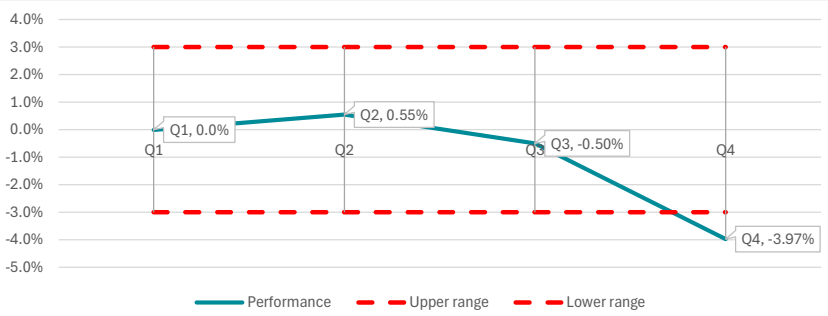
#### NFDC ID NO.36: Resident satisfaction score with the quality of NFDC digital services

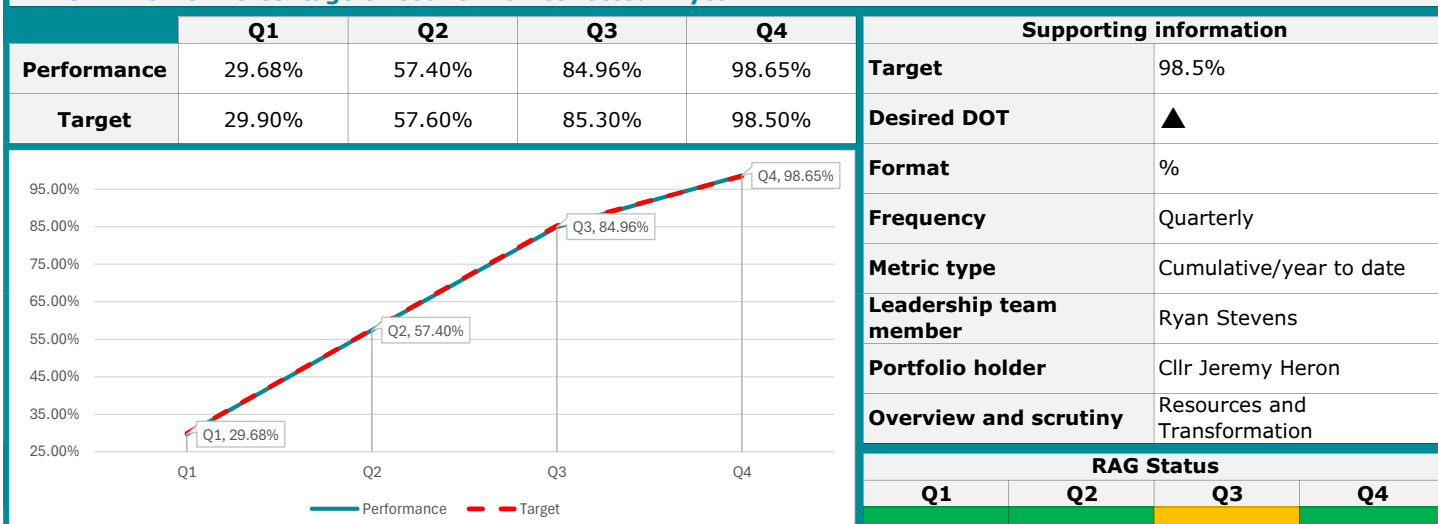
	2022/3	2024/5	Supporting information	
Performance	N/A	N/A	Target	70%
Target	N/A	70.0%	Desired DOT	▲
<b>Supporting narrative</b>  The scheduled resident survey was not conducted this year due to the pre-election sensitivity period preceding the general election in 2024, which impacted our ability to carry out this insight. As a result, the necessary data for this measure is not available for the period.  Additionally, we are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the Corporate Plan Priority re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).			Format	%
			Frequency	Upon completion of resident survey
			Metric type	Snapshot/point in time
			Leadership team member	Rich Bird/Kim Gray
			Portfolio holder	Cllr Jeremy Heron
			Overview and scrutiny	Resources and Transformation
			RAG Status	
			2022/3	2024/5
			N/A	N/A

Future New Forest: Being an employer of choice						
NFDC ID NO.37: Percentage of vacancies filled first time						
	Q1	Q2	Q3	Q4	Supporting information	
Performance	82.5%	88.2%	88.0%	81.0%	Target	80%
Target	80.0%	80.0%	80.0%	80.0%	Desired DOT	▲
					Format	%
					Frequency	Quarterly
					Metric type	Snapshot/point in time
					Leadership team member	Heleana Aylett
					Portfolio holder	Leader Cllr Jill Cleary
					Overview and scrutiny	Resources and Transformation
					RAG Status	
Q1	Q2	Q3	Q4			
Supporting narrative						
Q1	22 vacancies were filled first time.					
Q2	45 vacancies were filled first time.					
Q3	33 vacancies were filled first time.					
Q4	End of year position exceeds target.					
NFDC ID NO.38: Percentage staff turnover						
	2023/4	2024/5	Supporting information			
Performance	13.48%	13.00%	Target	11%		
Target	N/A	11.00%	Desired DOT	▼		
<b>Supporting narrative</b> <p>We had a total of 108 leavers last year.</p> <p>Exit interviews are optional and rarely completed, making it difficult to track where employees go.</p> <p>Of the 30 interviews conducted last year, 8 were due to retirement.</p> <p>To gain better insight into leaver destinations, HR will carry out a data-gathering exercise and monitor the results to inform future actions.</p>			Format	%		
			Frequency	Annually		
			Metric type	Snapshot/point in time		
			Leadership team member	Heleana Aylett		
			Portfolio holder	Leader Cllr Jill Cleary		
			Overview and scrutiny	Resources and Transformation		
			RAG Status			
2023/4		2024/5				
N/A						

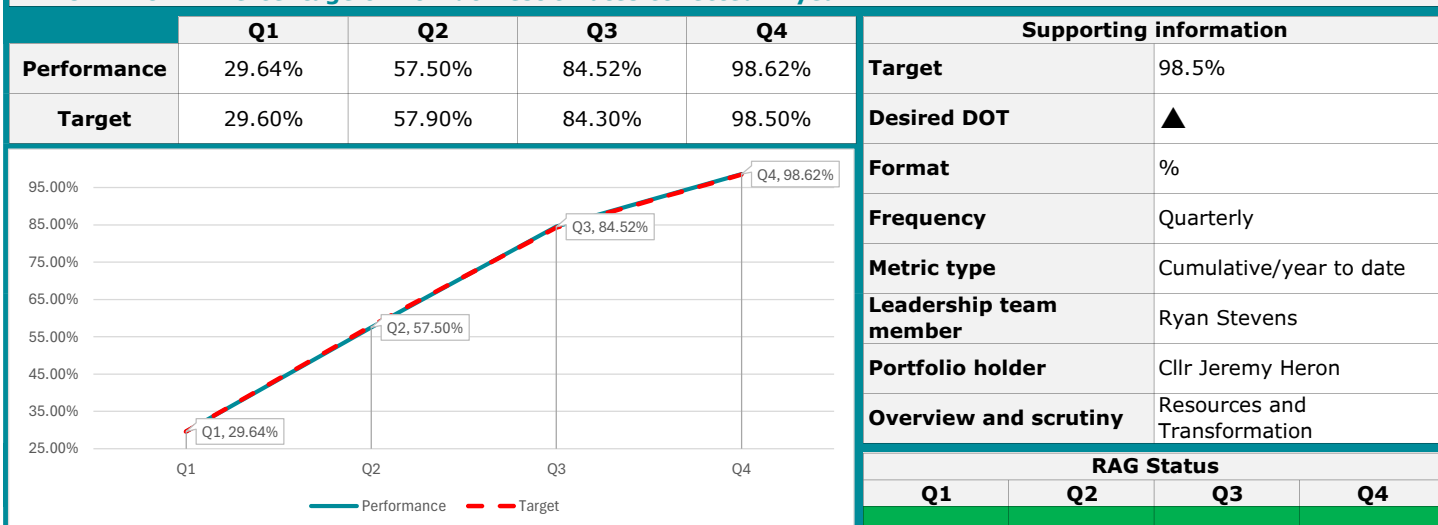
NFDC ID NO.39: Average number of days sickness absence per employee																							
	Q1	Q2	Q3	Q4	Supporting information																		
Performance	9.27	9.78	9.33	8.80	Target	8																	
Target	8.00	8.00	8.00	8.00	Desired DOT	▼																	
<table><tr><th>Quarter</th><th>Performance</th><th>Target</th></tr><tr><td>Q1</td><td>9.27</td><td>8.00</td></tr><tr><td>Q2</td><td>9.78</td><td>8.00</td></tr><tr><td>Q3</td><td>9.33</td><td>8.00</td></tr><tr><td>Q4</td><td>8.80</td><td>8.00</td></tr></table>					Quarter	Performance	Target	Q1	9.27	8.00	Q2	9.78	8.00	Q3	9.33	8.00	Q4	8.80	8.00	Format	Numerical		
					Quarter	Performance	Target																
					Q1	9.27	8.00																
					Q2	9.78	8.00																
					Q3	9.33	8.00																
					Q4	8.80	8.00																
					Frequency	Quarterly																	
Metric type	Snapshot/point in time																						
Leadership team member	Heleana Aylett																						
Portfolio holder	Leader Cllr Jill Cleary																						
Overview and scrutiny	Resources and Transformation																						
					RAG Status																		
Q1		Q2		Q3	Q4																		
Supporting narrative																							
Q1	There are ongoing instances of sickness and our absence management policy requires these are followed up appropriately by managers. Automated notifications are sent to managers to support the application of the policy.																						
Q2	Between Q1 and Q2, there has been a decrease in short term absence (4.22 to 4.17), but an increase in long term (5.06 to 5.61) which has subsequently increased total sickness days per FTE. As HR now have more capacity, we are able to work more closely with managers to support them in assisting their team back to work sooner following absences.																						
Q3	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.																						
Q4	Sickness per FTE has come down since last quarter and continues to come down as can be seen with historical data.																						

NFDC ID NO.40: Number of council apprenticeships				
	2023/4	2024/5	Supporting information	
Performance	12	18	Target	10
Target	N/A	10	Desired DOT	▲
<b>Supporting narrative</b> Of the 18 apprenticeships from 2024/5: 10 apprentices were existing employees. 6 apprentices were new recruits. 2 individuals were undertaking a second apprenticeship: One transitioned from a Level 3 to a Level 4 qualification in Finance. Another moved from a Level 2 to a Level 4 qualification in Project Management.			Format	Numerical
			Frequency	Annually
			Metric type	Snapshot/point in time
			Leadership team member	Heleana Aylett
			Portfolio holder	Leader Cllr Jill Cleary
			Overview and scrutiny	Resources and Transformation
			RAG Status	
2023/4	2024/5			
N/A				

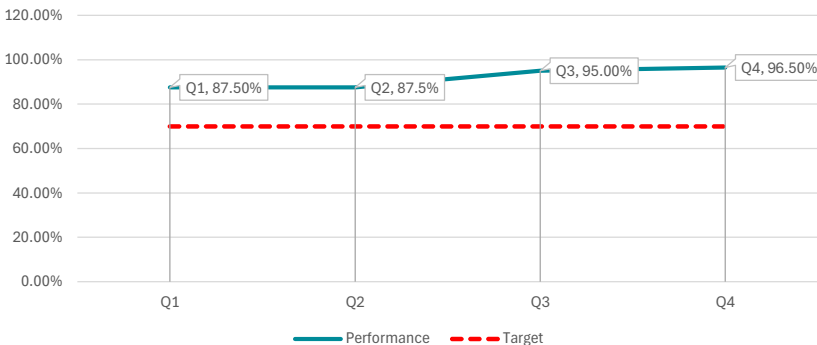
Future New Forest: Being financially responsible								
NFDC ID NO.41: Percentage variance to Council budget +/- (General fund budget variations)								
	Q1	Q2	Q3	Q4	Supporting information			
Performance	N/A	0.0%	0.0%	-10.09%	Target	+/- 3%		
Upper range	3.0%	3.0%	3.0%	3.0%	Desired DOT	▲ or ▼		
Lower range	-3.0%	-3.0%	-3.0%	-3.0%	Format	%		
					Frequency	Quarterly		
					Metric type	Snapshot/point in time		
					Leadership team member	Paul Whittles		
					Portfolio holder	Cllr Jeremy Heron		
					Overview and scrutiny	Resources and Transformation		
					RAG Status			
					Q1	Q2	Q3	Q4
					N/A			
Supporting narrative								
Q1	No budget variation report until Q2.							
Q2	Indicative figures as at 16 October 2024, final figures will be confirmed as set out in the Financial Monitoring Report taken to Cabinet 6 November 2024.							
Q3	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.							
Q4	Figures subject to audit. Full details of variations will be set out in the Budget Monitoring report to be presented to Cabinet on 2 July 2025							
NFDC ID NO.42: Percentage variance to Housing Revenue budget +/- (HRA budget variations)								
	Q1	Q2	Q3	Q4	Supporting information			
Performance	N/A	0.55%	-0.50%	-3.97%	Target	+/- 3%		
Upper range	3.00%	3.00%	3.00%	3.00%	Desired DOT	▲ or ▼		
Lower range	-3.00%	-3.00%	-3.00%	-3.00%	Format	%		
					Frequency	Quarterly		
					Metric type	Snapshot/point in time		
					Leadership team member	Paul Whittles		
					Portfolio holder	Cllr Jeremy Heron		
					Overview and scrutiny	Resources and Transformation		
					RAG Status			
					Q1	Q2	Q3	Q4
					N/A			
Supporting narrative								
Q1	No budget variation report until Q2.							
Q2	Indicative figures as at 16 October 2024, final figures will be confirmed as set out in the Financial Monitoring Report taken to Cabinet 6 November 2024.							
Q3	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.							
Q4	Figures subject to audit. Full details of variations will be set out in the Budget Monitoring report to be presented to Cabinet on 2 July 2025							

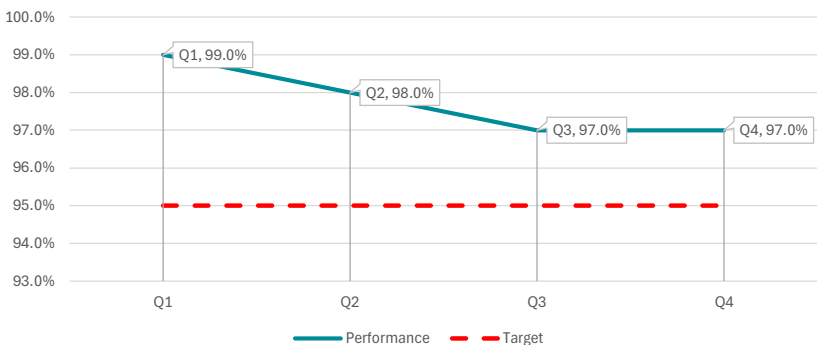
**NFDC ID NO.43: Percentage of Council Tax collected in year****Supporting narrative**

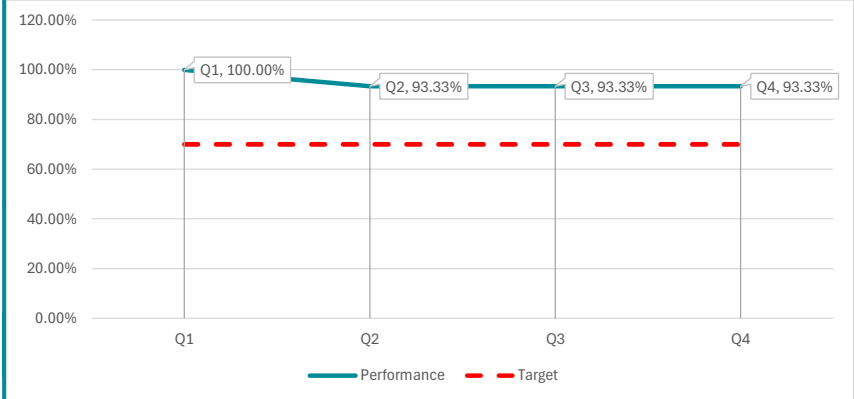
<b>Q1</b>	Collection is slightly down when compared to 23/24, this could be due to extending instalments, and last year there was the also the Council Tax Support Fund payments.
<b>Q2</b>	-
<b>Q3</b>	Target is cumulative. Some instalments have been spread to March 2025 so collection rates should be maintained 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.
<b>Q4</b>	Performance exceeds target.

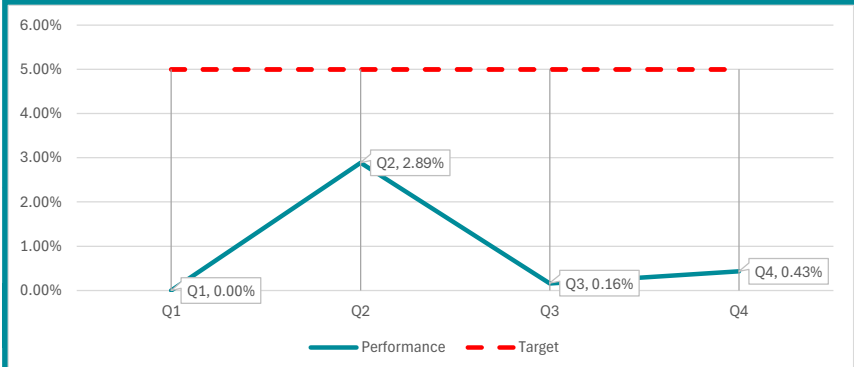
**NFDC ID NO.44: Percentage of Non-domestic Rates collected in year****Supporting narrative**

<b>Q1</b>	-
<b>Q2</b>	-
<b>Q3</b>	-
<b>Q4</b>	Performance exceeds target.

Future New Forest: Designing modern and innovative services								
NFDC ID NO.45: Benefits realisation from ICT investment								
	Q1	Q2	Q3	Q4	Supporting information			
Performance	87.50%	87.5%	95.00%	96.50%	Target	70.00%		
Target	70.00%	70.00%	70.00%	70.00%	Desired DOT	Maintain		
					Format	%		
					Frequency	Every 6 months		
					Metric type	Snapshot/point in time		
					Leadership team member	Rich Bird		
					Portfolio holder	Cllr Jeremy Heron		
					Overview and scrutiny	Resources and Transformation		
					RAG Status			
Q1	Q2	Q3	Q4					
Supporting narrative								
Q1	-							
Q2	-							
Q3	-							
Q4	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)							

NFDC ID NO.46: Percentage of ICT incidents resolved within SLA								
	Q1	Q2	Q3	Q4	Supporting information			
Performance	99.0%	98.0%	97.0%	97.0%	Target	95.0%		
Target	95.0%	95.0%	95.0%	95.0%	Desired DOT	▲		
					Format	%		
					Frequency	Quarterly		
					Metric type	Snapshot/point in time		
					Leadership team member	Kim Gray		
					Portfolio holder	Cllr Jeremy Heron		
					Overview and scrutiny	Resources and Transformation		
					RAG Status			
Q1	Q2	Q3	Q4					
Supporting narrative								
Q1	-							
Q2	-							
Q3	-							
Q4	Performance is above target and remains steady quarter on quarter.							

NFDC ID NO.47: Percentage of annual ICT work programme delivered on time and on budget								
	Q1	Q2	Q3	Q4	Supporting information			
Performance	100.00%	93.33%	93.33%	93.33%	Target	70.0%		
Target	70.00%	70.00%	70.00%	70.00%	Desired DOT	Maintain		
					Format	%		
					Frequency	Quarterly		
					Metric type	Snapshot/point in time		
					Leadership team member	Rich Bird		
					Portfolio holder	Cllr Jeremy Heron		
					Overview and scrutiny	Resources and Transformation		
					RAG Status			
	Q1	Q2	Q3	Q4				
Supporting narrative								
Q1	-							
Q2	-							
Q3	-							
Q4	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.							

NFDC ID NO.48: Percentage unscheduled downtime for critical systems								
	Q1	Q2	Q3	Q4	Supporting information			
Performance	0.00%	2.89%	0.16%	0.43%	Target	<5%		
Target	5.00%	5.00%	5.00%	5.00%	Desired DOT	▼		
					Format	%		
					Frequency	Quarterly		
					Metric type	Snapshot/point in time		
					Leadership team member	Kim Gray		
					Portfolio holder	Cllr Jeremy Heron		
					Overview and scrutiny	Resources and Transformation		
					RAG Status			
	Q1	Q2	Q3	Q4				
Supporting narrative								
Q1	-							
Q2	-							
Q3	-							
Q4	Performance is within targeted expectation.							

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NO.	Short name	2024/5 target	2025/6 target	Outcome	Revised 2025/6 target	Rationale
004	Number of Appletree Careline services provided to customers	4,139	4,238	Change to Monitor	3899	Following a Cabinet decision made during the re-prioritisation exercise—prompted by the Corporate Peer Challenge action plan and the potential impacts of Local Government Reorganisation (LGR), a revised target has been approved. Starting from the baseline, the target will increase by 60 services each year. The new target will be profiled to reflect peaks and troughs of the business, representing a 30 target increase in each Q1 and Q2 and a flatline target for each Q3 and Q4 as follows; Target profile: 3869, 3899, 3899, 3899 per Q respectively.
005	Resident perception that their quality of life is affected by the fear of crime	20%	N/A	Removal of measure	N/A	We are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).
006	Resident perception that they feel safe when outside in their local area	85%	N/A	Removal of measure	N/A	We are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).
007	Investment in and rollout of public space CCTV system	£40,000	TBC	New target set for 2025/6	£80,000	Progress to be monitored towards an £80k total target spend for the financial year 2025/6.
008	Number of education and awareness sessions in relation to serious crime	Monitor	Monitor	Remains Monitor	Monitor	Delivery outside of direct authority control and influence.
009	Number of positive interventions in response to Public Spaces Protection Orders (1 and 2)	Monitor	Monitor	Remains Monitor	Monitor	Delivery outside of direct authority control and influence.
010	Number of cultural events and activities supported by New Forest District Council	24	24	No change	24	The target set in 2024/25 remains unchanged. While there was some discussion in this area, it was agreed that strong partnership working and access to external support are sufficient to maintain current performance levels.
011	Number of affordable homes delivered by NFDC and its partners	186	TBC	New target set for 2025/6	387 (199 in financial year)	Target set based on forecasting projection provided by partners and their expected programme over the next 12 months. We have removed the term 'social housing' from the short definition for this measure. The long definition remains unchanged. It is felt this revision to the short name, is clearer, and more succinct.
012	Number of affordable council homes delivered against the 2018-2026 target	373	TBC	New target set for 2025/6	462 (87 in financial year)	The target takes schemes currently under construction (forecast to reach practical completion during the year) and private homes that are in the process of being purchased on the open market. The target includes schemes that have been commissioned by us as well as homes being built under contract as part of private developments. We are currently negotiating other development opportunities which may increase the number of homes completed during the year plus additional contractual commitments thereafter.

019	Percentage of allowed planning appeals	<10%	<10%	Change to short name and calculation method.	<10%	<p>The existing measure is Percentage of allowed planning appeals (of all planning appeals heard) in the quarter.</p> <p>Quarterly appeals are small numbers and result in huge swings in performance against target. This is often then presented as an exception and requires explaining.</p> <p>We have always reported this with contextual narrative. For example: Q3, there were 5 appeals, with 3 allowed. This is therefore reported as 60%, well above the 10% target. 195 decisions were made over the same period.</p> <p>Therefore we propose amending this to 'flatten' the metric so it is less susceptible to huge swings that do not give a clear reflection of performance.</p> <p>We now present this as appeals composed of two variables in the quarter – Number of appeals and application decisions made.</p> <p>Number of appeal decisions that are allowed by the planning inspectorate (in the quarter) /total number application planning decisions made (in the quarter) x 100</p>
020	The total outstanding net dwelling supply as set out in our development plan	7,720 + delivery shortfall TBC	7,320 + delivery shortfall TBC	New target set for 2025/6	7968	The target has been determined using the outstanding dwelling supply and anticipated shortfall as at the end of 2024/5. This figure is subject to change once 2024/5 completion data is finalised. The 2024/5 target was also assessed and set at 8241, this was determined using the outturn shortfall as at 1 April 2024 of 521.
021	Kilogrammes of non-recycled waste produced per household	456Kg/ per HH	TBC	New target set for 2025/6	425Kg/ per HH	Proposed targetted reduction in residual waste takes in to consideration phased rollout of new service and wheeled bins over coming months. The expectation is that this will continue to improve in to 2026/7 when full service rollout is complete. Target profile: 110, 106, 106, 103Kg/per HH per Q respectively.
022	Households using our chargeable garden waste service as a percentage of total properties in NFDC	27%	TBC	New target set for 2025/6	31%	Target set in line with current performance and to promote sustainable service growth over the coming year. Target profile: 29%, 30%, 31%, 31% per Q respectively.
023	Emissions from the council's vehicle fleet	Monitor	Monitor	No change	Monitor	Infrastructure not yet in place to electrify fleet. Feasibility study to be undertaken to assess viability, therefore review of target may be appropriate in the future.
024	Percentage of household waste sent for recycling	38.5%	TBC	New target set for 2025/6	41%	Proposed targetted increase takes in to consideration phased rollout of new service and wheeled bins over coming months. The expectation is that this will continue to improve in to 2026/7 when full service rollout is complete.
025	Number of fly-tipping incidents per 1,000 people	<13.94	TBC	No change	<13.94	Flytipping is a persistent problem and outside of direct authority control, enforcement activity will continue in effort to influence local behaviour. Therefore target for 2025/6 to be set in line with 2024/5 target. In a change to how data is reported, we now have a phased, cumulative quarterly target for this measure, leading up to a year-end goal of fewer than 13.94.
026	Percentage customer satisfaction with the appearance of their local area.	75%	N/A	Removal of measure	N/A	We are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).
027	Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted	23,000	TBC	No change	23,000	No increase in number of water fillers installed, therefore 2025/6 target to be set in line with 2024/5 target.
028	Squared metres of industrial/employment land developed.	Monitor	TBC	No change	Monitor	Delivery outside of direct authority control and influence.

030	Resident perception of our high streets and town centres	82.5%	N/A	Removal of measure	N/A	We are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).
031	Vacancies of retail premises within town/local centres	Monitor	Monitor	No change	Monitor	Delivery outside of direct authority control and influence.
032	Employment rate percentage of working age adults (aged 16-64)	Monitor	Monitor	No change	Monitor	Delivery outside of direct authority control and influence.
033	Proportion (in percentage terms) of employee jobs with hourly pay below the living wage	Monitor	Monitor	No change	Monitor	Delivery outside of direct authority control and influence.
034	Resident satisfaction with Council services	65%	N/A	Removal of measure	N/A	We are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).
036	Resident satisfaction score with the quality of NFDC digital services	70%	70%	Removal of measure	N/A	We are currently unable to confirm a date for the next resident survey, following a cabinet decision made during the re-prioritisation exercise earlier this year. This exercise was brought about by the corporate peer challenge action plan and the ongoing potential implications of Local Government Reorganisation (LGR).
040	Number of council apprenticeships	10	TBC	New target set for 2025/6	15	Through the newly approved People Strategy we are committed to continuing to support development of staff and identifying opportunities to maximise the use of the apprenticeship levy to do so.

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**Cabinet - 2 July 2025**

## **Corporate Plan: Annual Performance Report 2024/25**

Purpose	For review
Classification	Public
Executive Summary	The Corporate Plan: Annual Performance Report 2024/25 is presented and outlines key achievements and performance highlights aligned with the Corporate Plan's priority areas, covering the period from April 2024 to March 2025.
<b>Recommendation(s)</b>	<b>That Cabinet note the Corporate Plan: Annual Performance Report 2024/25.</b>
Reasons for recommendation(s)	This annual report provides a retrospective overview of key performance activities during the 2024/25 financial year. It marks the first year of assessing progress against the objectives set out in the Corporate Plan 2024–2028. In line with our commitments under the Performance Management Framework, the Annual Performance Report is published annually and will be made publicly available via our website.
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. A new Corporate Plan was introduced in April 2024 and is in place covering the years 2024-2028.
2. The annual report for April 2024-March 2025 therefore represents the first year of reporting against our new Corporate Plan 2024-2028.

## **The Annual Performance Report**

3. The Annual Performance Report (Appendix 1) highlights the Council's key achievements during 2024/25, demonstrating progress against the priorities set out in the Corporate Plan.
4. Complementing the quarterly dashboard updates, the Annual Performance Report offers a year-end summary enriched with detailed insights and contextual narratives from across our service areas, providing a more cohesive and comprehensive account of performance.

## **Corporate plan priorities**

5. The Annual Performance Report is laid out in line with the Corporate Plan priority areas of People, Place, Prosperity, underpinned by the Future New Forest transformation programme.

## **Options appraisal**

6. We have produced annual reports over many years. As part of our Performance Management Framework, we have laid out the commitment to producing quarterly dashboards alongside the Annual Performance Report and that these will be made publicly available via our website.

## **Consultation undertaken**

7. The Annual Performance Report in itself has not been consulted on externally, although this will be a public-facing document. It is internally produced, reflecting on our performance relative to the Corporate Plan 2024-2028.
8. The Annual Performance Report has been developed with input and updates gathered from across our services. To support this, the Performance and Insight Team has collaborated closely with data owners, service managers, and Strategic Directors. Our focus has been on identifying content that aligns with the objectives set out in our Corporate Plan.
9. Our Executive Management Team has reviewed the content, with comments and suggestions accommodated.
10. The Annual Performance Report, once approved at Cabinet, will be presented in the public domain on the New Forest website as part of our accountability and commitments made in our Performance Management Framework.

## **Financial and resource implications**

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

### **Legal implications**

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

### **Risk assessment**

13. There are no new risks arising from this report. The nature of reporting means performance is scrutinised at a service level as content becomes available, and any associated risks and mitigation are put in place and reported as part of our quarterly dashboard reporting and associated narrative as appropriate.

### **Environmental / Climate and nature implications**

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

### **Equalities implications**

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

### **Crime and disorder implications**

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

### **Data protection / Information governance / ICT implications**

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

### **New Forest National Park implications**

18. Visibility of our performance promotes good outcomes across the land within the National Park area. Our progress and the activity under our direct control and delivered with our partners furthers the interests of the National Park and landscape.

### **Overview and Scrutiny panel comments**

19. The Annual Performance Report is presented to all three panels as follows:
- 18/06/2025 – Housing and Communities Overview and Scrutiny panel

- 19/06/2025 – Place and Sustainability Overview and Scrutiny panel
- 26/06/2025 – Resources and Transformation Overview and Scrutiny panel

20. The Annual Performance Report was well received by Panels. It was acknowledged that the report provided a positive overview, effectively conveying a strong narrative of service achievements over the past year.

## **Conclusion**

21. The review of our Annual Performance Report offers a more detailed narrative of the improvement activities undertaken in support of our Corporate Plan commitments. The report has been thoroughly considered through the governance structures outlined in our Performance Management Framework, which reinforces transparency and accountability.

## **Appendices**

Appendix 1 - Annual Performance Report 2024-2025.

## **Background Papers**



# Annual performance report

2024 to 2025





## Leader's foreword

As we take this opportunity to reflect on the past year, we pass a significant milestone for our council, the end of our 50th year of operation since the council's formation in April 1974. We celebrated this achievement with our stand at the New Forest Show in July last year, also using this occasion to officially launch our new Corporate Plan 2024-28.

Our longevity stands as a testament to our collective dedication and commitment to serving our communities. As we recognise our achievements, we embark on a new chapter in our journey in preparing for local government reorganisation (LGR), and we remain focused on delivering high-quality services, driving economic growth and improving the lives of our residents.

The past year has not been without its challenges, LGR, the wider devolution agenda, and the potential changes these will bring to us cannot be ignored. However, we are determined to navigate these changes positively, engaging with the process and working collectively with all councils in Hampshire and the Solent to support the creation of a new Mayoral strategic authority, and develop a proposal for local government reorganisation which protects our district's best interests.

In December we welcomed the Corporate Peer Challenge team from the Local Government Association (LGA). A group of peers facilitated discussion with our officers, elected members

and partners focusing on key issues for the organisation to gain valuable insight. A report was published by the LGA following the completion of the review outlining recommendations, which we have developed into an action plan. Delivery of these actions will be carefully monitored, and reporting will be integrated in our regular performance reporting cycles. The challenge reaffirmed our transformation and improvement journey but highlighted a need to focus our efforts to ensure meaningful progress towards our priorities.

The corporate peer challenge and ongoing LGR discussions have prompted a review of council priorities to ensure our ambitions are balanced with our capacity and focused on the right outcomes. These revised priorities have been approved by our overview and scrutiny panels and cabinet members. The corporate plan sets out these ambitions for the future built around 3 key priorities:

- people
- place
- prosperity

These are underpinned by our realigned transformation programme, 'Future New Forest'.

This report is the first annual reflection on the progress we have made in these key priority areas, showcasing our achievements, whilst recommending areas where we should focus on improvement.


As we look forward, we are committed to embracing the opportunities and challenges that lie ahead, continuing to modernise how we operate, exploring new technologies and ways of working to improve our services, enhance our customers' experience and put us in the best place possible for the future.


**Cllr Jill Cleary**


Leader of New Forest District Council


## 2024/2025 Performance Summary


KPIs are rated RAG (Red, Amber, Green) according to the performance against target.
















 On target or above target













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





 Over 10% deviation from the lower threshold of the target
















 KPI marked TBC due to lag in data availability, context and an estimated data availability is provided in these cases.

 KPI marked N/A due to performance being outside of our direct control and influence, or data not being collected during period.

PEOPLE	ID	KPI Name	RAG		
	1	Percentage of homelessness duty cases successfully prevented			
	2	Number of households in external emergency accommodation			
	3	Number of families with children under 16 in external emergency shared accommodation over 6wks			
	4	Number of Appletree careline services provided to customers			
	5	Resident perception that their quality of life is affected by the fear of crime			
	6	Resident perception that they feel safe when outside in their local area			
	7	Investment in and rollout of public space CCTV system			
	8	Number of education and awareness sessions in relation to serious crime			
	9	Number of positive interventions in response to Public Spaces Protection Orders (1 and 2)			
	10	Number of cultural events and activities supported by New Forest District Council			
	11	Number of social housing homes delivered by NFDC and its partners			
	12	Number of affordable council homes delivered against the 2026 target set			
	13	Percentage score for the overall tenant satisfaction with the Council as a landlord (TSMs)			
	14	Number of council homes achieving Energy Performance Certification band C			
	15	Percentage scores for the 5 safety and compliance management (TSMs)			
				Summary	
				RED	0
				AMBER	3
				GREEN	7
				TBC	0
				N/A	5

PLACE	ID	KPI Name	RAG		
	16	Percentage of major planning applications determined in time			
	17	Percentage of minor planning applications determined in time			
	18	Percentage of other planning applications determined in time			
	19	Percentage of allowed planning appeals			
	20	The total outstanding net dwelling supply as set out in our development plan			
	21	Kilogrammes of non-recycled waste produced per household			
	22	Households using our chargeable garden waste service as a percentage of total properties in NFDC			
	23	Emissions from the council's vehicle fleet			
	24	Percentage of household waste sent for recycling			
	25	Number of fly-tipping incidents per 1,000 people			
	26	Percentage customer satisfaction with the appearance of their local area			
	27	Equivalent number of 0.5 litre bottles filled at water-filling stations – waste averted			
				Summary	
				RED	0
				AMBER	1
				GREEN	6
				TBC	3
				N/A	2

PROSPERITY	ID	KPI Name	RAG		
	28	Squared metres of industrial/employment land developed			
	29	Level (£) of retained business rates (at source)			
	30	Resident perception of our highstreets and town centres			
	31	Vacancies of retail premises within town/local centres			
	32	Employment rate percentage of working age adults (aged 16-64)			
	33	Proportion (in percentage terms) of employee jobs with hourly pay below the living wage			
				Summary	
				RED	0
				AMBER	0
				GREEN	0
				TBC	3
				N/A	3

FUTURE NEW FOREST	ID	KPI Name	RAG		
	34	Resident satisfaction with Council services			
	35	Staff satisfaction score with NFDC ICT services			
	36	Resident satisfaction score with the quality of NFDC digital services			
	37	Percentage of vacancies filled first time			
	38	Percentage staff turnover			
	39	Average number of days sickness absence per employee			
	40	Number of council apprenticeships			
	41	Percentage variance to Council budget +/- (General fund budget variations)			
	42	Percentage variance to Housing Revenue budget +/- (HRA budget variations)			
	43	Percentage of Council Tax collected in year			
	44	Percentage of Non-domestic Rates collected in year			
	45	Benefit realisation from ICT investment			
	46	Percentage of ICT incidents resolved within SLA			
	47	Percentage of annual ICT work programme delivered on time and on budget			
	48	Percentage unscheduled downtime for critical systems			
				Summary	
				RED	3
				AMBER	1
				GREEN	8
				TBC	1
				N/A	2



Council members outside St Georges Hall, Calshot

## People

### Helping those in greatest need

This year, a community project at St George's Hall, Calshot, was launched to refurbish and create a community space in one of our more isolated communities. Collaborating with Fawley Parish Council, Hampshire County Council (HCC) Public Health, the local youth club, the 17 Port and Maritime Regiment, and village residents, renovations were completed in October, followed by a public opening event. The hall now includes a larger kitchen and main hall, cinema room, and accessible toilet. The aim of the project was to provide a warm and welcoming facility for the local community to meet, and in partnership with Fawley Parish Council support greater youth involvement and attract services to use the hall as a community hub in future. The project was partly funded by the Government through the Rural England Prosperity Fund, the UK Shared Prosperity Fund, and the Contain Outbreak Management Fund.

In 2024/25, we supported 17 initiatives through our revised community grants scheme, awarding £130,000 in revenue and £96,040 in capital grants. The funding went towards a range of community interest projects including creative learning activities, supported living for vulnerable adults, support for young carers, residents with

a disability, those experiencing homelessness or mental health concerns, and sports and leisure, and arts and cultural provisions, with the aim of improving the lives of our more vulnerable residents, supporting our valued voluntary networks to have more security over the long term, and creating opportunities to interact with wider wellbeing initiatives and growing economic development opportunities. Beneficiaries included local charitable organisations, and various local councils and clubs. Additionally, £51,100 in community transport grants were given in partnership with HCC and Community First Wessex. For the 2025/6 budget, a total of over £274,000 in capital, revenue and community transport grant funding has been approved.

As part of the Household Support Fund we distributed £90,000 this year, to 305 households who were struggling financially, and distributed £401,835 in food vouchers to over 8,000 households who were in receipt of Council Tax Support and Housing Benefit, with the aim of tackling food and fuel poverty.

Partnering with the voluntary sector remains a priority, ensuring support for vulnerable households and those in need. We chair a bi-monthly New Forest Partnership Meeting, bringing together various organisations to





Ringwood Town Football Club pitch

share information and collaborate on projects. This includes working with and supporting local foodbanks, weekly food larders, and 5 community hubs as part of a cost-of-living steering group with officers regularly attending, as well as a disability charity who support hospital discharges, and take up of home adaptations and disability benefits.

Work has continued towards the rollout of universal credit to eligible residents receiving certain benefits. To date 2,013 eligible New Forest residents have been migrated on to universal credit, and our team from our revenues and benefits service have provided signposting, additional support and escalation of specific cases to the DWP to ensure that our residents in greatest need are supported through this process.

### **Empowering our residents to live healthy, connected and fulfilling lives**

A new football facility was opened in Ringwood this year following significant financial contribution from the council including £535,000 in developer contributions and CIL funding. The full scheme (costing a total of £3.4m) includes a club house, pitch facilities and changing rooms. It was officially opened in November 2024 with an event which was attended by our leader, Cllr Jill Cleary. We continue to support this project

through the Ringwood Town Football Facility steering group. Working with Ringwood Town Council, AFC Bournemouth Community Sports Trust to ensure development outcomes are met for the benefit of the town and its residents.

Additionally, £120,000 was provided for a new 3G sports pitch at Testwood School in Totton, enhancing existing facilities for the school and, for the first time, wider community use by local sports clubs, which provide superb facilities for expansion and by reducing travel requirements improves accessibility.

The contracted delivery of 5 council-owned leisure centres continued, with an annual update in September reporting an increase of over 1,700 health and fitness memberships. This year saw utilisation of swimming lessons rising to around 79% of class places filled. Participation in 'healthy communities' sessions, where participants have been referred by their GP, saw a 2,600 increase in uptake.

To help grow the cultural sector to improve access to cultural activities, a New Forest Cultural Development Board was formed, bringing together creative industry partners to focus on creative and cultural development. We facilitated a number of community engagement sessions this year attracting over 150 attendees, an artist and poet were in residence at these sessions,



D Day commemoration, Lyndhurst

and were able to meet with local councillors, young people, local residents and members from the local professional arts and cultural collective Folio.

Local artists from SPUDworks in Sway created an art piece titled 'Anthropogenic Nest, Effects on Nature Caused by Humans' as part of our Look Out for Our Forest project. The piece was launched at the New Forest Show in July and toured the district, visiting town centres to generate interest and discussion within the community about climate and nature sustainability and how we protect our unique environment.

Reflecting our commitment to supporting our varied communities, work has been undertaken towards a revised and updated Armed Forces Covenant. This important document, first signed in 2013 with the armed forces community of HQ Solent Station at Marchwood, outlines the support we provide to those who are or have served in the armed forces, and their families. To better promote this available support, a suite of webpages has been developed, detailing assistance in housing, healthcare, education, employment and community integration, upholding the principles of the covenant and ensuring the armed forces community is treated fairly and with respect. The covenant will be signed by the Council and with the armed forces community in Autumn 2025.

### Meeting housing needs

In response to our strategic priority of returning empty homes in the district back into use, this year, 12 privately owned empty homes were reintegrated into use as part of the empty homes strategy, addressing private sector housing needs and enhancing neighbourhood quality. Contractors cleared homes and gardens, and we engaged with property owners to support them to resolve issues.

In the final year of our Homelessness Strategy rough sleeping in the district reached an 8-year low, with only 1 to 2 individuals identified sleeping rough on any given night. This reduction highlights the effectiveness of our strategy and wider partnerships. Support for rough sleeping in Hythe is delivered in partnership with The Crossings charity.

In response to our commitment to delivering more affordable, and greener, housing our latest affordable housing development at Moore Close, New Milton, saw 6 apartments and 10 houses, including 5 shared ownership properties, completed in January 2025. Built to high energy efficiency standards with features like extra thermal insulation, triple glazing, photovoltaic roof panels, and air source heat pump technology. Each property includes a fitted kitchen, two parking spaces with electric vehicle charging points, and a private garden.





Housing services are preparing for the regulator's new consumer standards, using them to improve services and outcomes for tenants. Although 99% of the council's 5,200 homes meet the current decent home standard, we are not complacent and long-term investment plans are in place to modernise and future-proof housing stock.

This year saw the development of a new Landlord Strategy, drawing on the achievement of our landlord services and setting out the future aims of the service. The strategy aims to continue to provide secure, safe, warm, and affordable homes for our tenants, whilst delivering and building new affordable homes that will benefit our future communities, tenants, leaseholders, the economy, and our environment.

Members and officers want to improve the effectiveness of Tenant Engagement and a new Strategy was approved, setting priorities of listening to tenants, putting tenants first, knowing tenants and supporting engagement, and improving communication. These priorities were co-created with the Tenant Involvement Group, demonstrating the council's commitment to incorporating tenant voices into our decision-making. In the 2024/5 tenant satisfaction survey, 84% of tenants responded that they were 'overall satisfied' with us as a landlord, up 3% from the previous year.

In February a major, and increased, investment total of £22.11m was approved for housing maintenance and improvements to the Council's housing stock. The funding will support several projects to further upgrade properties across the district and continue to provide energy efficient, safe and quality housing for residents. Fire safety improvements have also been budgeted for, whilst £15.2m has been allocated to building and acquiring new council homes. £1.87m has been allocated towards energy efficiency activity to deliver on our Greener Housing Strategy commitments, working towards our long-term goal of bringing all properties to EPC C rating by 2030.

Development of a comprehensive Condensation, Damp and Mould Policy was completed this year, designed to manage tenants reports of these issues and maintain our housing stock and tenant safety. Prioritising health and safety, property maintenance, tenant satisfaction and compliance with regulatory standards, the policy is crucial in meeting housing needs and supporting our tenants.



GIS map of the district

## Place

### Shaping our place now and for future generations

Following the February 2024 approval of a full review of our adopted local plan, activity in this area began this year. This has included a call for development sites exercise which generated over 150 submissions over the 3-month consultation period. Several studies were commissioned to look at requirements for housing for different groups in the community, open spaces, play pitches and play facilities and other considerations to be reflected in planning policy. We hosted 7 engagement sessions across the district, giving over 200 people the opportunity to ask questions directly to our planning policy team, raise issues and concerns and contribute to the consultation. A draft local plan will be considered towards the end of 2025.

A referendum in July saw 83.2% of Ringwood residents (58.93% turn out) vote to adopt the Neighbourhood Plan for Ringwood, which will now be part of the development plans for New Forest District Council and New Forest National Park Authority. This brings several benefits to the town including community-led development, sustainability, environmental enhancements and economic growth.

We successfully lobbied HCC to reconsider plans to close two household waste and recycling centres within the district. The decision to not close the sites was welcomed in October, aligning with our goals to improve recycling and reduce waste.

### Protecting our climate, coast, and natural world

A Climate Change and Nature Emergency update report was published this year, detailing our progress in tackling climate change and improving nature recovery (latest report covering Jan 1, 2023, to Mar 31, 2024), highlighting a reduction in emissions from both the council and district areas of approximately 2%. The report detailed activities which have been undertaken, working in partnership with residents, businesses, community groups and the third sector. This included the launch of Community Energy New Forest supporting renewable energy generation, launch of Cosy Homes New Forest a retrofit tool to advise private residents on basic energy improvements to their homes, establishing orchard habitats at 2 locations within the district, and attending events to raise awareness of proactive action residents could take.





Refurbished beach shelter, Milford On Sea

In addition, we supported New Forest Transition with funding of £40,000 for the New Forest HEAT (Home Energy Advice Team) project (in partnership with community energy south) to fund a new free energy saving advice and volunteer training programme. Funding of £131,000 was also awarded from the UK Government Public Sector Decarbonisation Fund towards the replacement of end-of-life boilers at Appletree Court with more energy efficient Air Source Heat Pumps.

In partnership we secured £41 million for the region through the Warmer Homes Consortium, allowing New Forest residents to apply for grants of up to £25,000 to improve home energy efficiency. This supports the greener housing strategy 2022-32, aiming to meet energy efficiency targets and ease cost-of-living pressures.

This year, the Christchurch Bay and Harbour Flood and Coastal Erosion Risk Management Strategy was approved, developed with BCP council, the Environment Agency, and private consultants. The strategy outlines the preferred actions to protect the coastline from flooding and erosion, covering the NFDC section of coast from BCP's border to Hurst Spit. Development of a similar strategy for the Hurst Spit to Lymington section of our coast is being developed for completion in 2027, and engagement sessions

were held in Lymington and Milford-on-Sea, along with an event for members, officers, and Town and Parish Councilors at Appletree Court.

Ongoing maintenance at Milford-on-Sea was carried out in the autumn to improve seawall protection, this included the placing of 1,100 tons of rock, timber groyne repairs and importing of 2,500 tons of shingle to add to the beach. Improvement works were completed on 8 beach shelters at Milford-on-Sea, Hordle Cliff and Barton-on-Sea, funded by the UK Shared Prosperity Fund, giving them a much-needed facelift and more pleasant and accessible facilities for visitors to our coast.

Works were completed at Woodside Park in Pennington as part of a £1m Green Way recreational mitigation programme to improve walking routes and green spaces (Community Infrastructure Levy (CIL) funded). The works include new foot paths and boardwalks to establish a new and accessible walking route, a dog training and activity area, and a community orchard.

The 'Let it Bee' campaign ran during spring/summer with grassy areas being left to grow wild where possible and only where they would not cause any obstruction. This initiative aligned with many other Local Authorities, landowners, residents and the Government in recognition of



Waste fleet - Marsh Lane Depot, Lymington

the importance of leaving areas to grow naturally during this time to help pollinators.

The Keyhaven Natural Capital Scheme, the first biodiversity net gain (BNG) and nitrate mitigation scheme in the district, was announced creating a 1,000-acre nature reserve. Developers are required to ensure a 10% improvement in biodiversity, if this can't be achieved on their building site, they can buy BNG units from schemes like Keyhaven which also provide Nitrate Mitigation credits to protect water quality. Developed in partnership with Kingwell (Aubrey) Limited, the New Forest National Park Authority, and Hampshire and Isle of Wight Wildlife Trust the project demonstrates our commitment to sustainable development and sets a positive example of how stakeholders can work together to ensure long-term protection of our environment.

Work was carried out this year towards developing our air-quality strategy which proactively seeks to improve public health and the environment through reducing emissions, building on ongoing air quality work. Key priorities of the plan include addressing health inequalities, tackling pollution, and raising public awareness. Implementation of the strategy will be carried out in partnership with local stakeholders.





Officers and council members opening the new Hardley depot

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

It has been a busy year preparing for the launch of our new waste service, commencing in June 2025. Focus has been on ensuring residents are prepared for changes and ensuring we have adequate skills, knowledge and capacity to respond to customer queries.

The new service will be rolled out in 3 phases. To support residents to understand which phase they live in a postcode look-up tool was launched on our website, the page has been viewed over 14,500 times. All residents in the first phase have been sent a letter and information leaflet on how new collections will work, key dates and where to access support if needed, further information will be shared in the coming months. Staff and Councillor sessions were held to introduce the changes and ensure a consistent approach when speaking with residents.

Since April 2024 we have been running a fortnightly garden waste collection service using wheeled bins, replacing the previous sack collection. Customers have responded well and over 29% of residents are now signed up to this paid service. Up to the end of December 2024, this service saw a 46% increase in garden waste tonnage compare to the previous year when the sack service was in place.

The new Hardley Depot, replacing Claymeadow in Totton, opened in March 2025 and will serve as a base for operational services in the east of the district. The depot features spacious offices, meeting rooms, vehicle maintenance areas, electric vehicle charging points, and ample storage. This significant project - finalised after 10 years of work, aims to provide adequate facilities to allow sustainable service growth, better working conditions for staff, and enhanced service delivery for residents.

Our emergency response team was called into action this year, notably responding to a sewage alert/do not swim warning at Milford-on-Sea and multiple water shortages across the east of the district affecting over 18,000 homes. Response included distribution of water, sharing of key messages/updates and ensuring vulnerable residents could access additional support. The team also worked on upskilling local community stakeholders to proactively support their residents to improve their resilience. This was through the Community Forum, a series of events which invites town and parish councillors, local organisations and responders to network, share advice and guidance, hear presentations from key speakers. We have also lobbied with other councils and MPs to secure a more effective and timely response to water shortages from Southern Water.



Salisbury Road Arcade, Totton

## Prosperity

### **Maximising the benefits of inclusive economic growth and investment**

The Solent Freeport is a unique opportunity, bringing sustainable economic growth to the district. The Leader represented the council on the Solent Freeport Board through the year and the following were agreed by Cabinet in April as the priorities for the New Forest which would be achieved through a successfully delivered Solent Freeport: Transport/wider infrastructure, Employment and Skills, Prosperous Communities and Environmental Sustainability. Work has begun on the development of a Local Delivery Plan.

Over £5m funding was allocated in 2024/5 from the Community Infrastructure Levy (CIL), towards projects across the district. The projects will help deliver town centre improvements, develop recreation grounds, walking routes, and support flood defense work. In total 79 bids for CIL funding were received in the 2024 bidding window and funding for the successful schemes will be released during the 2025/6 financial year. The increased uptake in the bidding process could be attributed to a review of our community grant scheme resulting in town and parish council's being encouraged to apply for CIL funding to allow community grant funding

to reach smaller community led and multi-year projects. It has been agreed that the funding window for 2026/7 be opened early, allowing more time for applicants to develop proposals and help accelerate the delivery of future infrastructure improvements.

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

Work has been completed towards the development of the Totton Town Centre Masterplan, working with the Totton Partnership, to regenerate Totton town centre. The plan aims to improve access and connectivity, transform underutilised sites and enhance public space, creating a vibrant, attractive town centre which serves waterside communities, drawing on unique characteristics. Key aspects of the plan include community collaboration, expert support and resident involvement. An update report was endorsed by cabinet in March 2023 which approved further engagement with local partners and residents, further development of the plan and several 'quick wins' to be implemented in the shorter term. Consultants have now been appointed to support the design process.

We continued to sponsor the 'Best Micro-Business' award at the New Forest Business





Young Local Authority of the Year competition

Partnership, Brilliance in Business awards, spotlighting business with fewer than 5 employees.

We secured £1 million from the government's UK Shared Prosperity Fund and just over £0.5 million through the Rural England Prosperity Fund Funds were directed to projects and interventions including town centre improvements in Totton, Fordingbridge, New Milton, Ringwood, Hythe and Dibden, and Marchwood.

### **Championing skills and access to job opportunities**

We participated in an apprenticeship levy transfer initiative working with Solent Business and Skills partnership, funding apprenticeships for local businesses of up to £50,000, easing costs to SMEs within the district and allowing access to apprenticeship training fees they would not otherwise have had access to. We pledged over £20,000 to BlueBird Care, enabling 3 new level 3 care apprenticeships at locations in Totton, Lymington and Ringwood.

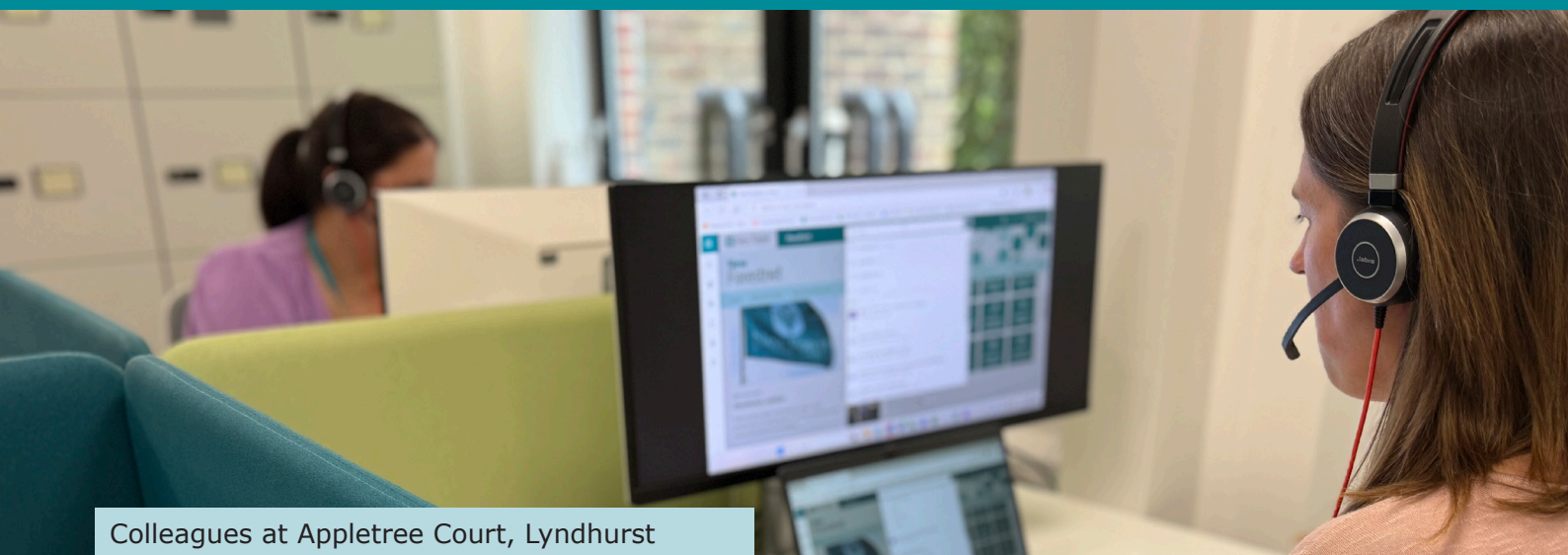
Using UK Share Prosperity funding we partnered with Solent Business & Skills Solutions to launch the New Forest Apprenticeship and Skills Hub early this year. The hub helps local businesses and organisations find suitable training providers, choose relevant apprenticeship or skills programs, and navigate funding options,

including levy transfers. The service aims to enable business to invest in workforce development, enhancing local skills and employment opportunities.

We took part in the annual LGA apprentice of the year competition, which provided an opportunity to learn from, share skills and work and network with other apprentices. The council has 18 people currently on an apprenticeship, working towards nationally recognised qualifications, which exceeds targeted expectation.

A tour of our Moore Close development in New Milton during the construction phase was given to domestic electrical installation students from Brockenhurst College. The tour gave them the opportunity to see how electrical work is carried out on an active site and aimed to enhance their understanding of the trade.

Two colleagues, from our Housing and Environmental Health teams, entered the Young Local Authority of the Year competition in March 2025. The event is designed to provide a supportive atmosphere, offering attendees constructive feedback through a series of formal presentations, discussions and informal challenges. The competition focuses on improving attendees' communication skills and building their confidence and provides a valuable networking opportunity for those in the early stages of their local government careers.



Colleagues at Appletree Court, Lyndhurst

## Future New Forest

### Putting our customers at the heart

Our new Customer Strategy 2024 – 28 sets out our vision and commitment to achieving the best possible customer experience for our residents. The policy outlines how customers will be at the heart of everything we do, utilising technology, a digital design approach and data-led decision making to provide a better and consistent experience for all our customers.

We are committed to providing residents, tenants and customers with quality services, however, sometimes things do go wrong. We encourage our residents to tell us when this happens so we can put things right, learn from our mistakes and improve our services. We have updated our corporate complaints procedure to meet enhanced requirements set out in the Local Government and Social Care Ombudsman's and the Housing Ombudsman's Complaints Handling Codes. The profile of complaints has been raised both locally and at a national level and we have seen a significant increase in the number of corporate complaints during 2024/25 (a 113% increase from 2023/24).

We recognise the importance of complaints as a key source of insight and are committed to using complaints to drive service improvements. Demonstrating our Learning value we have

implemented processes to address failures arising from complaints, implementing actions to improve services and ensure a better future experience for residents, tenants and customers.

In our housing services, a tenant complaint forum has been established. This small group of tenants will monitor the service received by complainants and make recommendations that aim to increase tenant satisfaction, whilst a tenant representative will sit on the Housing Overview & Scrutiny Panel to provide the tenant viewpoint.

We have seen an increase in residents seeking to exercise information rights over their personal data, including subject access requests and requests to change or delete their data. There has been a 100% increase in the number of requests received in 2024/25 from 2023/24.

Work has continued towards implementing a new digital platform which will manage our customer database (often referred to as a customer relationship management (CRM) system) as well as an online customer portal, telephony and call/email handling, and other applications for managing customer cases to create more flexible and efficient customer engagement.





People strategy staff engagement

## Being an employer of choice

The council has developed a new People Strategy aimed at attracting, retaining, and developing staff, demonstrating significant progress towards becoming an employer of choice. The strategy is shaped by four themes: grow, connect, empower, and strong roots, which align with the council's LEAF values. An action plan has been developed, prioritising staff support and development despite the uncertainties of LGR shortening delivery timescales. The strategy has been approved and formally launched in early 2025/6.

Working for the council offers a unique opportunity to make a real difference, combining meaningful, purposeful work with a strong sense of community. This year's staff survey saw an increased response rate of 16% (from 41% in 2022), with 73.5% of respondents strongly agreeing they understand council priorities and objectives, 88% feeling their work makes a difference to our communities, and 81% enjoying working for the authority. The survey highlighted areas for improvement, including access to line managers, ensuring staff are heard, and providing support for those experiencing inappropriate behavior from colleagues or the public.

Several HR policy amendments were approved, including changes to maternity, paternity, and adoption leave, support leave for carers,

flexible working from day one of employment, and a new buying and selling leave scheme. Additionally, 40 staff members across different grades completed management development training, with new cohorts planned for 2025/6, reflecting the council's commitment to developing management skills. Housing Services Managers have begun work to achieve qualifications via the Chartered Institute of Housing (CIH) to meet new requirements set out by the Regulator of Social Housing, whilst the Building Control Team undertook competency assessments to register as Registered Building Inspectors (RBI) to meet new standards. There was an increase in corporate training spend in 2024/5 of 8%.

The council strengthened its approach to equality, diversity, and inclusion. This includes forming the first employee-led LGBT+ network to connect colleagues, support peers, share knowledge, and improve services. Efforts to increase the diversity of applicants resulted in a 4% increase this year, with continued focus through the People Strategy.

The away space, a quiet room open to all colleagues at our Appletree Court offices was opened this year, championed by the Chief Executive, this space is designed to be accessible to all colleagues, for the purposes of quiet contemplation, meditation, time out, prayer, breastfeeding or for pregnant mothers, and to observe religious practices.



Appletree Court, Lyndhurst

The council was awarded Employer of the Year at the Brockenhurst College awards ceremony in July, recognising its commitment to strengthening relationships with the college and joint efforts towards improving apprenticeships and work experience.

### **Being financially responsible**

Brought about by the announcement of LGR the decision was taken to pause a pre-approved accommodation project at Appletree Court, and to pause further work on feasibility options around the Lymington Town Hall Site. Work on the Council's Strategic Asset Management plan commenced, to ensure future opportunities aligned to our broader estate are mindful of impacts that could arise from LGR proposals.

A new LGR reserve was established with an initial £150,000 to ensure the Council is well placed to access resources required to support LGR preparations. A review of the approved transformation strategy and business case was also undertaken to ensure activity is aligned and reasonable given potential impacts of LGR.

To ensure readiness for the reform to the public procurement regime and ensure we meet the requirements of the Procurement Act 2023, preparatory activity took place, including a review of all contract standing orders and benchmarking exercise against some comparator authorities with similar expenditure and population.

### **Designing modern and innovative services**

Work was completed to develop a new Digital Strategy, aligning with other key corporate documents, including The Corporate Plan. The Strategy enables delivery of 6 digital principles, customer first, digital by design, data driven, digital transformation, secure by design, robust and resilient infrastructure and digital skills for all. It was acknowledged by elected members that digital services underpin everything we do in supporting services operate. The strategy has been considered through the lens of potential LGR impacts but recognises the importance of remaining agile moving forwards. It remains important that all services are accessible to all residents, and additional support is available to those who are less digitally confident.

The ongoing commitment to modernise our digital service delivery to support our residents and our staff has seen projects commence to replace our housing maintenance software, alongside our customer facing digital platforms which will position the organisation well for future opportunities.



## Resources and Transformation Overview and Scrutiny Panel – 26 June 2025

Cabinet – 2 July 2025

### Financial Monitoring Report (Provisional Budget Outturn 2024/25)

Purpose	For Decision
Classification	Public
Executive Summary	<p>This report provides the provision outturn of the General Fund, Housing Revenue Account (HRA) and capital programme for the 2024/25 financial year.</p> <p>It states:</p> <ul style="list-style-type: none"> <li>the General Fund has a provisional surplus of £3.366 million with the intention to enhance specific reserves for Devolution and Local Government Reorganisation reserve (£350,000), Depot Improvements (£500,000) and the Council's Capital Programme reserve (£2.516 million).</li> <li>the HRA has a provisional surplus of £1.436 million, which is earmarked to enhance the Acquisition and Development reserve.</li> <li>£46.439 million has been invested in our Capital Programme (General Fund £17.787 million; HRA £28.652 million)</li> </ul>
Recommendation(s)	<p><b>It is recommended that Cabinet:</b></p> <ol style="list-style-type: none"> <li><b>1) note the provisional outturn of the General Fund, HRA, and Capital budgets for 2024/25.</b></li> <li><b>2) note the year-end rephasing, as included in the provisional outturn figures.</b></li> <li><b>3) approve an additional £350,000 is added to the Devolution and Local Government Reorganisation reserve.</b></li> </ol>

	<p><b>Is asked to recommend to Council that they:</b></p> <p><b>4) Approve adding £500,000 to the Capital Programme to facilitate improvements across the Council's depot estate.</b></p>
Reasons for recommendation(s)	<p>To comply with accounting codes of practice and best practice which requires councils to regularly monitor the annual budget position and take any action to support the sustainability of the council's financial position ensuring we are being financially responsible.</p> <p>To comply with the council's financial regulations regarding budget virements and supplementary budget requests.</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>Paul Whittles</p> <p>Assistant Director - Finance</p> <p>02380 285766</p> <p>paul.whittles@nfdc.gov.uk</p>

## Introduction and background

- Following the approval of the Original Budget for 2024/25 in February 2024 and quarterly updates via Financial Monitoring reports presented to Cabinet 4 September 2024, 6 November 2024 and 5 February 2025, this report sets out the provisional outturn results for revenue and capital budgets for both the General Fund and Housing Revenue Account for 2024/25.
- Financial Monitoring is an important feature in the management of the council's finances as it gives an opportunity to reflect on variations as against the latest set budget and reflect on the impact that these variations may have over the period covered by the council's Medium Term Financial Plan (MTFP).

3. Furthermore, the Council's financial planning process supports the delivery of the corporate objectives and the setting of the annual budget, and its performance is an important element of delivering the overall Corporate Plan.
4. The Council's statutory Statement of Accounts will be completed and signed by the Responsible Financial (S151) Officer and will be presented as final to the Audit Committee following the completion of an external audit. Should there be any significant variations from the figures presented in this report, they will be highlighted at that Committee. The Outturn position now presented is in management format.

### **Budget Outturn – General Fund**

5. The overall General Fund Net Budget Requirement (Revenue) provisional outturn position confirms a spend of £22.040 million against an original budget of £24.513 million. A positive variation of £2.473 million.
6. Within those figures, the net spend at Service Portfolio level is £0.615 million below the original budgeted sum for the year (£21.683 million spend as against £22.298 million original budget).
7. Further outturn variations, when compared against the original budget, totalling £1.858 million have occurred outside of the Service Portfolios mainly due to additional interest earnings of £1.287 million above the originally budgeted sum, a £303,000 reduction in Minimum Revenue Provision, £93,000 less interest payable costs and a reduction of £175,000 in revenue financing of the capital programme.
8. In addition, business rates income exceeded the original budget by £124,000, additional Government Grants of £45,000 were received and £724,000 was transferred back from sums allocated to reserves in previous years.
9. These positive variations, totalling £3.366 million, mean that the General Fund has been able to:
  - enhance the Devolution and Local Government Reorganisation Reserve, approved by Cabinet in February, by £350,000 (total £500,000), to ensure we deliver the best possible outcomes for the New Forest.
  - allocate up to £500,000 to welfare improvements across the Council's depot estate, supporting our people strategy and reputation as an employer of choice.

- transfer £2.516 million to the Capital Programme Reserve (resulting in overall annual movement of this reserve from a balance of £10.573m as of 31/3/24, to a balance of £7.989m as of 31/3/25).
10. Rephasing to future years, included in the outturn position, totals £1.035 million and includes:
- Local Plan Grants £298,000
  - Totton Commercial Investment £157,000
  - Homes for Ukraine Support £139,000
  - Economic Development Planning Skills Grant £100,000
  - Improve Digital Planning Grant £63,000
  - Homes for Afghans Support £62,000
  - CCTV £51,000
  - Other £165,000
11. The Financial Monitoring reports presented through Cabinet during the year included the rationale for the in-year variations and the summarised position is shown within Appendix 1, with further detail on the new outturn General Fund variations being shown by portfolio within Appendix 2.
12. In addition to the rephased elements detailed above (£1.035 million; paragraph 10) each portfolio has a number of new expenditure and income variations positively totalling £1.527 million net. Full details can be found at Appendix 2, but the most significant variances are as follows:
- **Health and Leisure Centres (Community and Wellbeing)**  
**-£257,000:** The council invested an additional £190,000 in asset maintenance partly supported by an extra £107,000 of income. Furthermore, £362,000 less was required to support the energy pain share contract provision with our leisure partner with other minor leisure related variances totalling £22,000 net.
  - **Car Parking (Environment and Sustainability)**  
**£200,000:** £93,000 of extra costs predominately regarding maintenance of car parks and vehicle hire were incurred throughout the year. Furthermore, there was a shortfall of £107,000 car parking income against budget.

- **Refuse and Recycling (Environment and Sustainability)**  
**-£325,000:** Additional grant funding to support the new waste service roll out totalling £202,000 was received at the end of the year. Final income figures relating to glass, trade and special collections provided £157,000 more than budgeted expectations. These were mitigated partly due to minor overspends relating to operational costs (£34,000).
  - **Waste Strategy (Environment and Sustainability)**  
**-£121,000:** Primarily as a result of vacant posts in the service relating to waste strategy resource, waste advisor and technical support posts. These savings have been incorporated into the MTFP for 2025/26 following a restructure of the service which removed these posts.
  - **Economic Development (Planning and Economy)**  
**-£265,000:** Predominately due to vacant posts but also includes associated supplies and services underspends.
13. The original General Fund Capital Programme budget was set at £16.579 million. This was increased to £20.545 million via financial monitoring throughout the year to take into account rephased amounts from 2023/24 and new in year requirement updates. The outturn position confirms a spend for the year of £17.787 million.
  14. The Council remains committed to delivering the capital programme, consequently rephasing budgets to future years as part of the outturn position is proposed totalling £1.010 million. Additionally, project savings were £1.748 million in 2024/25, with further details found at Appendix 4.
  15. This results in a year-end variation in comparison to the revised budget of -£2.758 million.

### **Budget Outturn – Housing Revenue Account**

16. The Housing Revenue Account provisional position confirms income for the year of £36.752 million (an increase of £565,000 from the original budget) and revenue spend for the year of £21.265 million (a decrease of £681,000 from the original budget). After taking these variations into account, and after allowing for net transfers to earmarked reserves of £151,000 and contributions to capital of £14.202 million, this results in an overall surplus for the year of £1.436 million, with this sum being transferred to the Acquisition and Development reserve.
17. Full details can be found at Appendix 3, but the most significant variances are as follows:

- General Management -£407,000
  - Cyclical Maintenance -£188,000
  - Housing Scheme and Temporary Accommodation -£163,000
  - Capital Financing Costs -£103,000
18. The original Housing Revenue Account Capital Programme budget was set at £32.380 million. This was reduced via financial monitoring through the year to £32.180 million. The outturn position confirms a spend for the year of £28.652 million. Outturn project underspends, primarily on the Major Repairs and Decarbonisation works were £2.607 million, with project rephasing to future years relating to Major Structural Refurbishments totalling £0.921 million. Further details can be found at the foot of Appendix 4.

### **Corporate plan priorities**

19. Regular monitoring and reporting of our financial activity including adjusting budgets whilst maintaining a balanced medium term financial plan (MTFP), ensures we are being financially responsible and supports our Corporate Plan which underpins the delivery of all our priorities.

### **Options appraisal**

20. In consultation with the s151 Officer a review of the items eligible for rephasing was undertaken to determine those carried forward to support specific deliverable schemes.
21. Furthermore, the council could choose now to allocate the £3.366 million surplus in the general fund to alternative reserves or other council initiatives, but in consultation with the Cabinet those currently proposed best support the council's current priorities. Further exploration of options to utilise the additional funds will be carried out during year, and specifically during the budget preparation process for 2026/27.
22. Additionally, the HRA surplus could be earmarked differently but given the extensive development programme it remains appropriate to enhance the Acquisition and Development reserve (in the knowledge that the reserve will support the financing of 2025/26 Capital Programme).

### **Consultation undertaken**

23. Internal consultation between finance officers, service managers and budget holders has determined the provisional outturn data presented in the report.

### **Financial and resource implications**

24. This is a financial report with budget implications already detailed and considered in the main body of the report.

### **Legal implications**

25. There are no legal implications arising directly from this report.

### **Risk assessment**

26. The provisional outturn figures are prepared in good faith and in line with accounting practice. Some figures are based on estimates and assumptions in consultation with services and all figures are subject to final confirmation following the conclusion of the external audit. Therefore, there is a risk some figures may change. Any changes will be reported to Audit Committee.

## **Environmental / Climate and nature implications**

27. There are no environmental implications arising directly from this report.

## **Equalities implications**

28. There are no equality implications arising directly from this report.

## **Crime and disorder implications**

29. The in-year underspend (£51,000) relating to the council's CCTV project has been rephased into 2025/26 to ensure delivery is achieved.

## **Data protection / Information governance / ICT implications**

30. There are no data protection, information governance or ICT implications arising directly from this report.

### **Appendices:**

Appendix 1 – General Fund Outturn 2024/25

Appendix 2 – Variation Analysis  
General Fund Outturn 2024/25 –  
Portfolio Summary

Appendix 3 – Housing Revenue  
Account Outturn 2024/25

Appendix 4 – Capital Programme  
Outturn 2024/25

### **Background Papers:**

Cabinet 5 February 2025:  
[Financial Monitoring Report -  
\(Based on Performance April to  
December 2024 inclusive\)](#)

Cabinet 6 November 2024:  
[Financial Monitoring Report -  
\(based on Performance April to  
September 2024 inclusive\)](#)

Cabinet 4 September 2024:  
[Financial Monitoring Report -  
\(based on Performance April to  
June 2024 inclusive\)](#)

Cabinet 21 February 2024 –  
Budget Reports 24/25:  
[Housing Revenue Account Budget  
and the Housing Public Sector  
Capital Expenditure Programme  
2024/25](#)

[Medium Term Financial Plan and  
Annual Budget 2024/25](#)



FINANCIAL MONITORING 2024/25 GENERAL FUND OUTTURN 2024/25						
	Feb-24 2024/25 £'000's Original Budget	Feb'25 2024/25 £'000's Updated Budget	Outturn 2024/25			
			2024/25 £'000's New Variations Expend.	2024/25 £'000's New Variations Income	2024/25 £'000's New Variations Rephasings	2024/25 £'000's Outturn Position
<b>PORTFOLIO REQUIREMENTS</b>						
Community, Safety and Wellbeing	3,468	3,466	-236	-198	-118	2,914
Environment and Sustainability	8,540	9,241	32	-334	-65	8,874
Finance and Corporate	4,220	3,702	-218	271	-183	3,572
Housing and Homelessness	3,499	3,291	85	-15	-185	3,176
Leader	1,174	1,271	256	-329	0	1,198
Planning and Economy	3,997	3,839	-453	-21	-484	2,881
Multi Portfolio adjustments - To be allocated	0	367	-367	0	0	0
	24,898	25,177	-901	-626	-1,035	22,615
Reversal of Depreciation	-2,190	-2,190	341			-1,849
Contribution (from) / to Earmarked Revenue Reserves	-410	-118	0	0	1,035	917
<b>NET PORTFOLIO REQUIREMENTS</b>	<b>22,298</b>	<b>22,869</b>	<b>-560</b>	<b>-626</b>	<b>0</b>	<b>21,683</b>
Minimum Revenue Provision	2,269	2,269	-303			1,966
Contribution to Capital Programme Financing (RCCO)	1,250	1,075				1,075
Interest Costs	150	150	-93			57
Interest Earnings	-1,432	-1,832		-887		-2,719
New Homes Bonus	-22	-22				-22
<b>GENERAL FUND NET BUDGET REQUIREMENTS</b>	<b>24,513</b>	<b>24,509</b>	<b>-956</b>	<b>-1,513</b>	<b>0</b>	<b>22,040</b>
<b>COUNCIL TAX CALCULATION</b>						
Budget Requirement	24,513	24,509	-956	-1,513	0	22,040
Less: Settlement Funding Assessment						
Lower Tier Service Grant	0	0				0
Transparency Code New Burdens	0	0		-9		-9
Services Grant	-25	-28				-28
Guarantee Grant (MHCLG)	-1,200	-1,233				-1,233
Business Rates Baseline	-4,330	-4,330		-213		-4,543
	-5,555	-5,591	0	-222	0	-5,813
Locally Retained Business Rates	-4,320	-4,320		-225		-4,545
Estimated Collection Fund (Surplus)/Deficit Business Rates	1,305	1,305				1,305
Contribution from Business Rates Equalisation Reserve	-1,305	-1,305		314		-991
Estimated Collection Fund (Surplus)/Deficit Council Tax	-179	-179				-179
Contribution (from) / to Earmarked Revenue Reserves					-724	-724
Contribution to/ from(-) Variation Reserves	0	40	956	1,646	724	3,366
<b>COUNCIL TAX</b>	<b>14,459</b>	<b>14,459</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>14,459</b>
<b>TAX BASE NUMBER OF PROPERTIES</b>	<b>72,371.50</b>	<b>72,371.50</b>				<b>72,371.50</b>
<b>COUNCIL TAX PER BAND D PROPERTY</b>	<b>199.79</b>	<b>199.79</b>				<b>199.79</b>
<b>GENERAL FUND BALANCE 31 MARCH</b>	<b>3,000</b>	<b>3,000</b>				<b>3,000</b>



## FINANCIAL MONITORING 2024/25

## VARIATION ANALYSIS GENERAL FUND 2024/25

## PORTFOLIO ADJUSTMENTS

## Housing and Homelessness

Homes for Ukrainian Families  
Homes for Afghan Families  
Homelessness Costs  
Stillwater Park  
Shared Amenities Contribution  
Community Housing Fund  
Corporate Allocations  
Net Other

## Leader

Transformation  
Elections  
UK Shared Prosperity Fund  
Corporate Allocations  
Net Other

## Planning and Economy

Local Plan - Rephasing- now underspend  
Local Plan - Local Plan Grant rephasing re consultancy  
Local Plan - Local Plan Grant rephasing + Green Belt grant  
Policy - Improve Digital Planning Grant  
Policy - S106 monitoring  
Planning - Development management salary underspends  
Planning -Planning Monitoring salary underspends  
Street Naming & Numbering - Additional Income  
Economic Development - Vacancies and Supplies & Services underspends  
Building Control - income shortfall  
Regeneration & Growth  
Corporate Allocations  
Net Other

## Portfolio adjustments - Non Direct

Net reallocated to Services

## TOTAL PORTFOLIO ADJUSTMENTS

## NON-PORTFOLIO ADJUSTMENTS

Contribution to/from(-) Earmarked Reserves  
Reversal of Depreciation  
Minimum Revenue Provision  
Interest Costs  
Interest Earnings

## TOTAL NON-PORTFOLIO ADJUSTMENTS

## GRAND TOTAL ADJUSTMENTS (Credited to (-) / Debited from (+) Budget Reserves)

Outturn			
2024/25 £'000's New Variations Expend.	2024/25 £'000's New Variations Income	2024/25 £'000's New Variations Rephasings	2024/25 £'000's Updated Variations Total
		-139	
		-62	
65			
1	-15		
13			
		16	
4			
2			
85	-15	-185	-115
-92			
27	-37		
324	-289		
1			
-4	-3		
256	-329	0	-63
-44		9	
-38			
		-298	
19	-38	-63	
		-32	
-56	-6		
-33			
	-20		
-265		-100	
-15	43		
-17			
8			
-12			
-453	-21	-484	-958
-367			
-367	0	0	-367
-901	-626	-1,035	-2,552
		1,035	
341			
-303			
-93			
	-887		
-55	-887	1,035	93
-956	-1,513	0	-2,459

FINANCIAL MONITORING 2024/25				
HOUSING REVENUE ACCOUNT OUTTURN 2024/25				
	Feb-24	Feb'25	Outturn	
	2024/25	2024/25	2024/25	2024/25
	£'000's	£'000's	£'000's	£'000's
	Original	Updated	New	Outturn
	Budget	Budget	Variations	Position
<b>INCOME</b>				
Dwelling Rents	-33,396	-33,796	19	-33,777
Non Dwelling Rents	-775	-735	2	-733
Charges for Services & Facilities	-1,169	-1,169	-35	-1,204
Contributions towards Expenditure	-60	-78	-33	-111
Interest Receivable	-441	-441	-135	-576
Sales Administration Recharge	-33	-33	8	-25
Shared Amenities Contribution	-313	-313	-13	-326
<b>TOTAL INCOME</b>	<b>-36,187</b>	<b>-36,565</b>	<b>-187</b>	<b>-36,752</b>
<b>EXPENDITURE</b>				
<b>Repairs &amp; Maintenance</b>				
Cyclical Maintenance	1,886	1,939	-188	1,751
Reactive Maintenance - General	3,400	3,452	-71	3,381
Reactive Maintenance - Voids	1,521	1,646	30	1,676
<b>Supervision &amp; Management</b>				
General Management	7,766	7,660	-407	7,253
Grounds Maintenance and Trees	936	1,037	-35	1,002
Housing Schemes and Temporary Accommodation	1,150	1,157	-163	994
Provision for Bad Debt	150	150	24	174
Capital Financing Costs - Interest/Debt Management	5,137	5,137	-103	5,034
Capital Financing Costs - Internal Borrowing	0	0	0	0
<b>TOTAL EXPENDITURE</b>	<b>21,946</b>	<b>22,178</b>	<b>-913</b>	<b>21,265</b>
<b>HRA OPERATING SURPLUS(-)</b>	<b>-14,241</b>	<b>-14,387</b>	<b>-1,100</b>	<b>-15,487</b>
Contribution to Capital - supporting Housing Strategy	9,700	9,700	-47	9,653
Capital Financing Costs - Principal	4,541	4,541	8	4,549
<b>HRA Total Annual Surplus(-) / Deficit</b>	<b>0</b>	<b>-146</b>	<b>-1,139</b>	<b>-1,285</b>
Contribution to/from(-) Earmarked Reserves	0	-61	-90	-151
<b>HRA TOTAL ANNUAL SURPLUS(-) / DEFICIT</b>	<b>0</b>	<b>-207</b>	<b>-1,229</b>	<b>-1,436</b>

APPENDIX

FINANCIAL MONITORING 2024/25						
CAPITAL PROGRAMME OUTTURN 2024/25			Feb-24	Feb'25	Outturn	
	Portfolio	2024/25	2024/25	2024/25	2024/25	2024/25
		£'000's Original Budget	£'000's Updated Budget	£'000's New Variations Expend.	£'000's New Variations Rephasing	£'000's Outturn Position
UK Shared Prosperity Fund	LEADER/ALL	208	230	73		303
Rural England Prosperity Fund	LEADER/ALL	300	531			531
Disabled Facilities Grants	HSG (GF)	1,500	1,500	-438		1,062
Sustainability Fund - Unallocated	ENV & SUSTAIN	250	100	-37		63
Strategic Regional Coastal Monitoring (22-27)	ENV & SUSTAIN	2,667	2,925	-40	-180	2,705
Barton Horizontal Directional Drilling Trials	ENV & SUSTAIN	260	150		-103	47
Hurst Spit Beach Shingle Source Study	ENV & SUSTAIN	100	25		-15	10
Milford Beach and Cliff Study	ENV & SUSTAIN	100				
Milford - Sea Wall Construction Works	ENV & SUSTAIN	100				
Waste Strategy Containers	ENV & SUSTAIN	1,025	1,088	-27	-43	1,018
St Georges Hall, Calshot	ENV & SUSTAIN		375			375
Asset Modernisation Programme - Public Convenience	F&C/E&S	300	225	-159	-58	8
New Depot Site: Hardley	FIN & CORP	4,372	6,349	90		6,439
Ringwood Depot: Extension and Works	FIN & CORP	250	250		-248	2
V&P; Replacement Programme	FIN & CORP	2,102	3,102	-329		2,773
V&P; Waste Strategy Vehicles	FIN & CORP	885	885	-695		190
ATC East Wing Boiler Replacement	FIN & CORP	160	160	-38		122
Commercial Property - Queensway - addit.works	FIN & CORP		610		-323	287
Eling Toll Bridge and Quayside Repairs	FIN & CORP		40		-40	
Crow Lane - Platinum Jubilee Business Park, Ringwood	FIN & CORP			-7		-7
Mitigation Schemes	PLAN & ECON	1,000	1,000	287		1,287
Infrastructure Projects	PLAN & ECON	1,000	1,000	-428		572
TOTAL GENERAL FUND CAPITAL PROGRAMME		16,579	20,545	-1,748	-1,010	17,787
Fire Risk Assessment Works	HRA	1,000	1,000	-194		806
Major Structural Refurbishments	HRA	1,260	1,260		-921	339
HRA - Major Repairs	HRA	8,600	8,600	-1,091		7,509
Decarbonisation	HRA	2,170	1,970	-927		1,043
Estate Improvements	HRA	200	200	-18		182
Council Dwellings - Strategy Delivery	HRA	18,200	18,200	-376		17,824
Disabled Facilities Grants	HRA	950	950	-1		949
TOTAL HRA CAPITAL PROGRAMME		32,380	32,180	-2,607	-921	28,652
GRAND TOTAL CAPITAL PROGRAMME		48,959	52,725	-4,355	-1,931	46,439

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**Cabinet – 2 July 2025**

## **Annual Complaints Performance and Service Improvement Report 2024/25**

Purpose	For Decision
Classification	Public
Executive Summary	<p>The Council must comply with increased self-assessment, reporting and compliance and scrutiny requirements in relation to its complaints handling and performance as set out in the Housing Ombudsman’s statutory Complaint Handling Code and the Local Government and Social Care Ombudsman’s non-statutory Complaint Handling Code.</p> <p>To meet these requirements, the Council produces an annual complaints performance and service improvement report for each financial year, which must be approved by Cabinet, as the Council’s governing body, and submitted to the Housing Ombudsman by 30 September each year.</p> <p>This report includes the Annual Complaints Performance and Service Improvement Report for the 2024/25 financial year, which has been scrutinised by the Housing and Communities Overview and Scrutiny Panel and the Resources and Transformation Overview and Scrutiny Panel, for approval.</p> <p>It also includes the self-assessments against the Complaint Handling Codes and the governing body’s response for approval.</p>
Recommendations	<p><b>That Cabinet:</b></p> <ol style="list-style-type: none"> <li><b>1. Approves the Annual Complaints Performance and Service Improvement Report 2024/25.</b></li> </ol>

	<p><b>2. Approves the self-assessments against the Complaint Handling Codes.</b></p> <p><b>3. Approves the governing body's response to the Annual Complaints Performance and Service Improvement Report 2024/25.</b></p>
Reasons for recommendation	The Annual Complaints Performance and Service Improvement Report 2024/25 and govern body's response are required to meet obligations set out in the Housing Ombudsman's statutory Complaint Handling Code and the Local Government and Social Care Ombudsman's non-statutory Complaint Handling Code.
Wards	All
Portfolio Holders	<p>Councillor Jeremy Heron – Finance and Corporate</p> <p>Councillor Steve Davies - Housing and Homelessness</p>
Strategic Directors	<p>Alan Bethune – Strategic Director Corporate Resources &amp; Transformation</p> <p>Richard Knott – Strategic Director Housing and Communities</p>
Officer Contact	<p>Amanda Wilson</p> <p>Service Manager – Legal and Information Governance</p> <p>02380 285306</p> <p><a href="mailto:amanda.wilson@nfdc.gov.uk">amanda.wilson@nfdc.gov.uk</a></p>

## Introduction and background

1. The purpose of this report is to provide members with the Annual Complaints Performance and Service Improvement Report to cover the period 1 April 2024 to 31 March 2025 (**Appendix 1**) and self-assessments against the Local Government and Social Care Ombudsman's and the Housing Ombudsman's Complaint Handling Codes (**Appendix 2**) and the governing body's response (**Appendix 3**) for approval.



2. This report also outlines some of the key changes to member scrutiny of complaints following the Complaint Handling Codes from both the Local Government and Social Care Ombudsman and the Housing Ombudsman taking effect on 1 April 2024.

### **Complaint Handling Codes**

3. There are two Ombudsmen with jurisdiction over the Council. The Housing Ombudsman for complaints from the Council's tenants relating to the Council in its capacity as their landlord and the Local Government and Social Care Ombudsman with jurisdiction over all other complaints.
4. From 1 April 2024, both the statutory [Housing Ombudsman's Complaint Handling Code](#), issued in accordance with the Social Housing (Regulation) Act 2023, and the non-statutory [Local Government and Social Care Ombudsman's Complaint Handling Code](#) took effect.
5. The Council's [Corporate Complaints Procedure](#) was largely compliant with the Codes, However, some amendments to the procedure were required which took effect on 1 April 2024.
6. The new Complaint Handling Codes include a requirement to produce an Annual Complaints Performance and Service Improvement Report for scrutiny and challenge which must include:
  - (a) the annual self-assessment against the Code to ensure the Council's complaint handling policy remains in line with its requirements;
  - (b) a qualitative and quantitative analysis of the Council's complaint handling performance. This must also include a summary of the types of complaints the Council has refused to accept;
  - (c) any findings of non-compliance with the Code by the Ombudsman;
  - (d) the service improvements made as a result of the learning from complaints;
  - (e) any annual report about the Council's performance from the Ombudsman;
  - (f) any other relevant reports or publications produced by the Ombudsman in relation to the work of the Council.
7. The Housing Ombudsman's Complaint Handling Code states that *'The Annual Complaints Performance and Service Improvement Report must be reported to the landlord's governing body (or equivalent) and published on the section of its website relating to complaints. The governing body's response to the report must be*

*published alongside this.* Guidance produced by the Housing Ombudsman provides that for a local authority, the governing Body is Cabinet.

8. In addition, the Housing Ombudsman's Complaint Handling Code includes the following requirements:

*'1.70 '...a member of the governing body (or equivalent) must be appointed to have lead responsibility for complaints to support a positive complaint handling culture. This person is referred to as the Member Responsible for Complaints ('the MRC').*

*1.71 The MRC will be responsible for ensuring the governing body receives regular information on complaints that provides insight on the landlord's complaint handling performance. This person must have access to suitable information and staff to perform this role and report on their findings.*

*1.72 As a minimum, the MRC, and the governing body (or equivalent) must receive:*

- (a) regular updates on the volume, categories, and outcomes of complaints, alongside complaint handling performance*
- (b) regular reviews of issues and trends arising from complaint handling*
- (c) regular updates on the outcomes of the Ombudsman's investigations and progress made in complying with orders related to severe maladministration findings*
- (d) the annual complaints performance and service improvement report'*

9. The guidance produced by the Housing Ombudsman provides that for a local authority, the MRC will be the portfolio holder with responsibility for Housing.
10. In addition, the Housing Ombudsman's guidance published on its website states that the self-assessment form, the Annual Complaints Performance and Service Improvement Report and the governing body's response should be submitted to the Housing Ombudsman by 30 September each year\* for the preceding financial year.
11. \*This submission date was previously 30 June for the first year's submission of the Annual Complaints Performance and Service Improvement Report 2023/24. The Housing Ombudsman confirmed that they have extended the submission deadline to 30 September as a result of feedback from landlords. This extension is helpful to the Council as it enables scrutiny of the Annual Complaints

Performance and Service Improvement Report by both the Housing and Communities Overview and Scrutiny Panel and the Resources and Transformation Overview and Scrutiny Panel prior to consideration by Cabinet. This is detailed further below at paragraph 13.

12. The Local Government and Social Care Ombudsman's Complaint Handling Code, includes mostly equivalent provisions to those set out above. However, the Local Government and Social Care Ombudsman is less prescriptive on who should hold the role of MRC. There is also no requirement for the self-assessment against the Local Government and Social Care Ombudsman's code nor the annual complaint performance and service improvement report to be submitted to them.

### **The Council's Arrangements for Scrutiny of Complaints**

13. To meet the new member scrutiny requirements, and the new 30 September submission date, the following arrangements have now been put in place:
  - There are two MRCs:
    - Housing and Homelessness Portfolio Holder – MRC - complaints under the jurisdiction of the Housing Ombudsman (and other Housing complaints).
    - Finance and Corporate Portfolio Holder – MRC - all other corporate complaints.
  - The MRCs will be given regular updates on complaint handling through their Portfolio Holder Briefings.
  - Cabinet, as the governing body, will also receive two reports per year on complaint handling to meet the obligations under the codes:
    - July - The Annual Complaints Performance and Service Improvement Report will be considered and the self-assessments and the governing body's formal response will be approved, prior to being published and then submitted to the Housing Ombudsman by 30 September each year.
    - December – The half yearly update report.
  - Overview and Scrutiny Panels:

It remains important that there is still general scrutiny of the Council's complaints handling process. The panels will receive two updates per year:

- June –The Annual Complaints Performance and Service Improvement Report will be considered by the Housing and Communities Panel and Resources and Transformation Overview and Scrutiny Panel
- November - The Resources and Transformation Panel (with Housing and Communities Panel members invited) will consider the half yearly update report.

### **Annual Complaints Performance And Service Improvement Report For 2024/25**

14. The Annual Complaints Performance and Service Improvement Report 2024/25 is included at **Appendix 1**.
15. The aim of this report is to meet the requirements of the Codes as set out at paragraph 6.
16. Whilst there is no requirement to submit information to the Local Government and Social Care Ombudsman, it is recognised that there is a benefit in the Council producing a single report which covers all of our complaint handling and all services of the Council. The Housing Ombudsman has confirmed that this approach is acceptable for the submission to them provided it is clear which parts of the report relate to tenant complaints.
17. There is a requirement within both the [Housing Ombudsman's Complaint Handling Code](#) and [Local Government and Social Care Ombudsman's Complaint Handling Code](#) for the Council to carry out annual self-assessments to ensure the complaints procedure complies with the codes.
18. There is a further requirement in the Housing Ombudsman's code that this self-assessment is reported to and approved by the governing body, at least annually.
19. The updated annual self-assessments for approval are included as **Appendix 2**.
20. The draft governing body's response to the report is included at **Appendix 3**.
21. When the report, self-assessments and governing body's response have been approved by Cabinet, they will be published on the

Council's webpage [Feedback, comments and complaints - New Forest District Council](#), and submitted to the Housing Ombudsman in accordance with the new 30 September submission date.

### **Corporate plan priorities**

22. Our approach to complaint handling is in line with the Council's [Corporate Plan 2024 to 2028 for people, place and prosperity](#) and our values: LEAF:
- Learning: we use complaints as an opportunity to learn from our mistakes.
  - Empathy: we show empathy to complainants.
  - Ambition: we have ambition to improve our services where it is identified that someone has not received the standard of service that they should have.
  - Fairness: we are fair to complainants and residents in our complaint handling.

### **Options appraisal**

23. An alternative option would be for the Annual Complaints Performance and Service Improvement Report to only be considered by the Resources and Transformation Overview and Scrutiny Panel, as has been the case previously with the annual complaints report. However, it is recognised that the Housing and Communities Panel has an interest in the scrutiny of the Housing elements of the report, particularly those under the remit of the Housing Ombudsman where they relate to complaints made to the Council in its capacity as a landlord. In addition, there is now a statutory requirement for Cabinet as the governing body to approve the report and issue the response, so it is appropriate that the new scrutiny processes are in place.

### **Consultation undertaken**

24. EMT has been consulted on this report.
25. The MRCs have also received an update on the information included within the report through their portfolio holder briefings.
26. Both the Housing and Communities Overview and Scrutiny Panel and the Resources and Transformation Overview and Scrutiny Panel have been consulted on this report.

### **Financial and resource implications**

27. There are none arising directly from this report.

## **Legal implications**

- 28. The Council is subject to a legal requirement to comply with the Housing Ombudsman's statutory Complaint Handling Code.
- 29. The Council should also be complying with the Local Government and Social Care Ombudsman's non-statutory Complaint Handling Code.

## **Risk assessment**

- 30. A formal risk assessment is not deemed to be required.

## **Environmental / Climate and nature implications**

- 31. There are none arising directly from this report.

## **Equalities implications**

- 32. There are none arising directly from this report.

## **Crime and disorder implications**

- 33. There are none arising directly from this report.

## **Data protection / Information governance / ICT implications**

- 34. There are none arising directly from this report.

### **Appendices:**

Appendix 1 – Annual Complaints  
Performance and Service  
Improvement Report  
Appendix 2 – Draft self-assessments  
Appendix 3 – Draft governing body's  
response

### **Background Papers:**

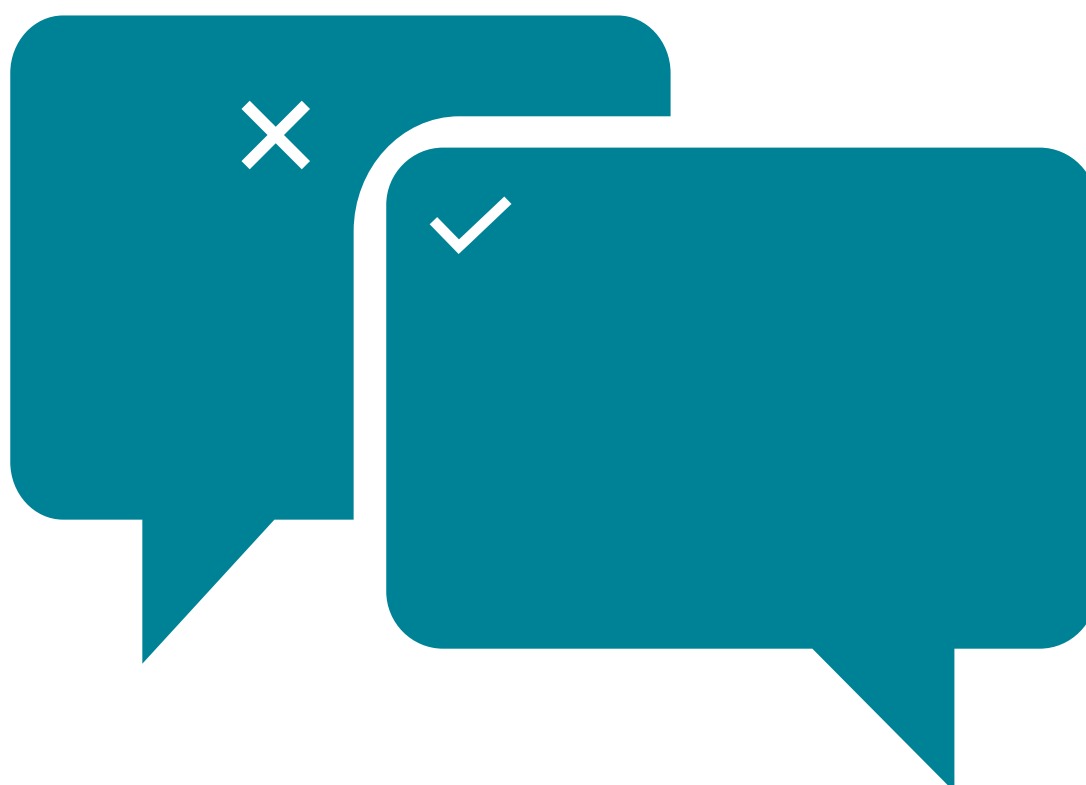
Published documents as referred  
to within report



# Annual Complaints Performance and Service Improvement Report

1 April 2024 – 31 March 2025

Information Governance and Complaints Team



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# 1. Introduction

- 1.1 New Forest District Council ('the Council') is committed to providing residents, tenants and our communities with quality services. However, sometimes things do go wrong. We encourage people to tell us when this happens so we can put things right, explain what has happened, learn from our mistakes and improve our services.
- 1.2 We have a **Corporate Complaints Procedure** which we follow for complaints that are made to the Council. This process is managed by the Information Governance and Complaints Team.
- 1.3 Our approach to complaint handling is also in line with the Council's **Corporate Plan 2024 to 2028 for people, place and prosperity** and our values: LEAF:
- **Learning**: we use complaints as an opportunity to learn from our mistakes.
  - **Empathy**: we show empathy to complainants.
  - **Ambition**: we have ambition to improve our services where it is identified that someone has not received the standard of service that they should have.
  - **Fairness**: we are fair to complainants and residents in our complaint handling.
- 1.4 The purpose of this report is to outline the complaints and compliments we have received during the period 1 April 2024 to 31 March 2025, highlighting key themes, trends and volumes recognising that accountability and transparency are integral to a positive complaint handling culture. The report includes case studies demonstrating learning from complaints received.

## 2. Complaint Handling Codes

### Background

- 2.1 There are two Ombudsman services with jurisdiction over our complaint handling; The Housing Ombudsman for complaints from our tenants relating to the Council in its capacity as their landlord, and the Local Government and Social Care Ombudsman with jurisdiction over all other complaints.
- 2.2 The Housing Ombudsman has a statutory power, in accordance with the Social Housing (Regulation) Act 2023, to issue a statutory code of practice and a statutory duty to monitor compliance with this code.
- 2.3 Accordingly, the Housing Ombudsman has issued a **statutory Complaint Handling Code**. The Local Government and Social Care Ombudsman has also issued a **non-statutory Complaint Handling Code** which aligns closely with the Housing Ombudsman's code. Both codes took effect on 1 April 2024.

### Self-Assessment

- 2.4 There is a requirement within both codes for us to carry out annual self-assessments to ensure our complaints procedure complies with the codes.
- 2.5 There is a further requirement in the Housing Ombudsman's code that this self-assessment is reported to and approved by our governing body (Cabinet), at least annually.
- 2.6 After approval, the self-assessments should also be published on the complaints section of our website. Our self-assessments against both codes are published here: **Feedback, comments and complaints - New Forest District Council**.

### Annual complaints performance and service improvement report requirement

- 2.7 We must also produce an annual complaints performance and service improvement report for scrutiny and challenge. This is the required report.

- 2.8 This report is approved by Cabinet. Cabinet’s formal response to this report will be published, alongside this report, here: **Feedback, comments and complaints - New Forest District Council**

## Housing Ombudsman Submission

- 2.9 The Housing Ombudsman requires that we submit a copy of our self-assessment, annual complaints performance and service improvement report and Cabinet’s response to the report to it by 30 September 2025.

## 3. Our procedure

3.1 We operate a 2 stage **Corporate Complaints Procedure** for all complaints.

3.2 The process followed is set out below:

Stage	Responsible Officer	Steps and Timescales
1	<p>Service Manager (in consultation with Assistant Director/Strategic Director as applicable).</p> <p>The Assistant Director or Strategic Director may personally deal with a complaint at stage 1 at their discretion.</p>	<p>Complaint received.</p> <p>Complaint <b>acknowledged within 5 working days</b> by the Information Governance and Complaints Team. This acknowledgement will set out our understanding of the complaint and the outcome the complainant is seeking. Complainant informed of officer dealing with complaint and expected response date.</p> <p>Complainant requested to clarify complaint and desired outcome if this is not clear.</p> <p>Stage 1 <b>response sent within 10 working days</b>, following the acknowledgement, advising the complainant of the right to escalate the complaint by contacting the Information Governance and Complaints Team (<a href="mailto:complaints@nfdc.gov.uk">complaints@nfdc.gov.uk</a>). The response will also advise the complainant of their right to escalate their complaint to the relevant Ombudsman when they have exhausted this Procedure.</p>
2	Monitoring Officer on behalf of the Chief Executive.	<p>Request to escalate complaint received.</p> <p>Escalation request <b>acknowledged within 5 working days</b> by the Information Governance and Complaints Team. This acknowledgement will set out our understanding of the complaint and the outcome the complainant is seeking. Complainant informed of officer dealing with complaint and expected response date.</p> <p>Stage 2 <b>response sent within 20 working days</b>, following the acknowledgement, advising the complainant that they have completed this Procedure, and they are entitled to refer their complaint to the Local Government and Social Care Ombudsman or, for Housing Complaints (by Council tenants/ leaseholders about the Council as their landlord), the Housing Ombudsman if they remain dissatisfied.</p>

3.3 These stages and timescales meet the requirements of the codes.

3.4 As a result of the new complaint handling codes, with effect from 1 April 2024 we took the following action:



- We updated our corporate complaints procedure to meet the requirements of the new codes, including the timescales.
- We updated our acknowledgment processes to clearly set out for complainants what our understanding of their complaint, and the outcome they are seeking, is.
- We introduced template letters to assist responders to complaints with covering all required information in their responses.

## 4. Structure

4.1 We recognise the importance of this report providing a clear picture of all our complaint handling. We have chosen to produce one report that covers all our service areas, which will go through one approval process and be submitted to the Housing Ombudsman in full. We have structured the analysis sections of this report as follows:

- All complaints (section 5)
- Complaints from tenants to the Council as its landlord (section 6)
- Complaints not accepted (section 7)
- Tenant Satisfaction Measures review (section 8)
- Learning (section 9)
- Ombudsman decisions (section 10)
- Compliments (section 11)
- Next steps for 2025/26 and beyond (section 12)

## 5. All complaints

### Summary – 2024/2025

**232**

Complaints  
received

**232 complaints  
received** (compared  
with 109 in 2023/24  
which is an increase  
of 113%)

**42**

Complaints  
relate to one issue

**42 / 232 complaints  
received relate to a  
single planning  
matter**



**Increase in Waste  
and Transport  
complaints** (increase  
of 175% from  
2023/24)



**76% of complaints  
resolved at stage 1**  
(compared with 78%  
in 2023/24)



**Most common  
theme for  
complaints is  
quality of service**  
(31%)



**Lower proportion of  
complaints upheld**  
(44% compared to  
53% for 2023/24)



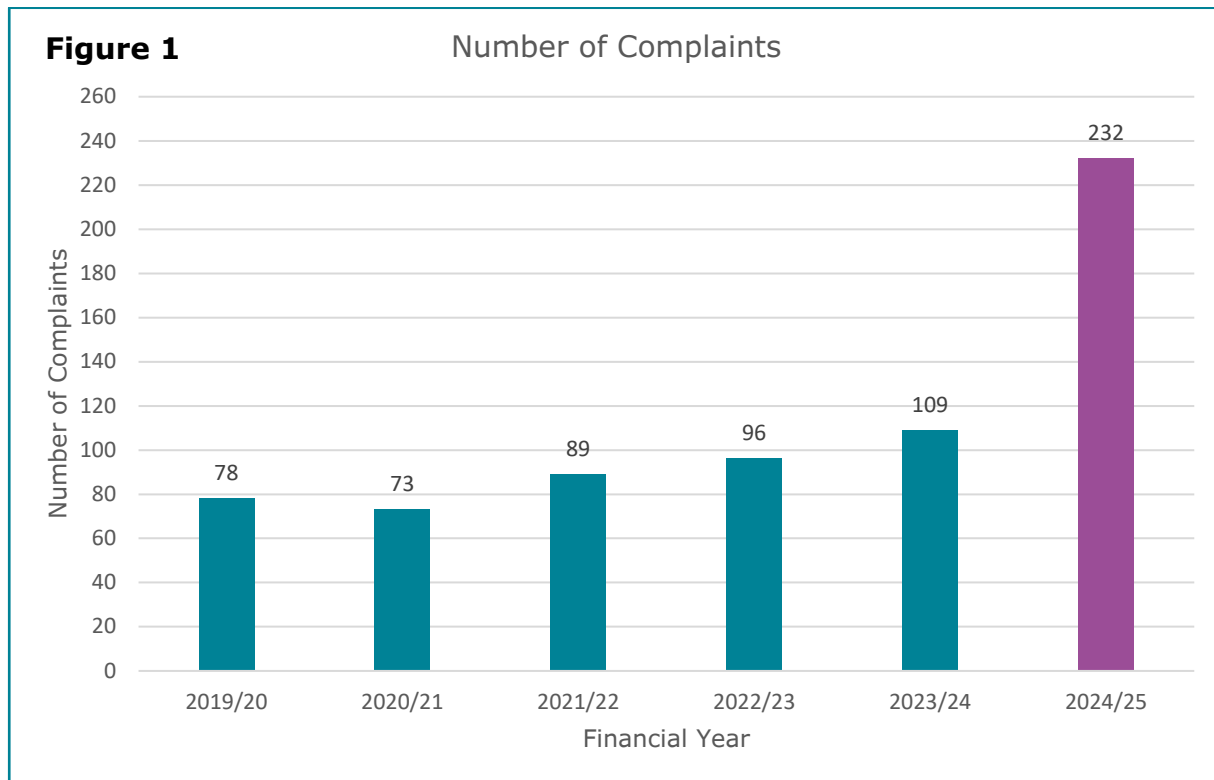
**93% of stage 1 and  
100% of stage 2  
complaints  
responded to within  
procedure  
timescales**



## Analysis

### Numbers

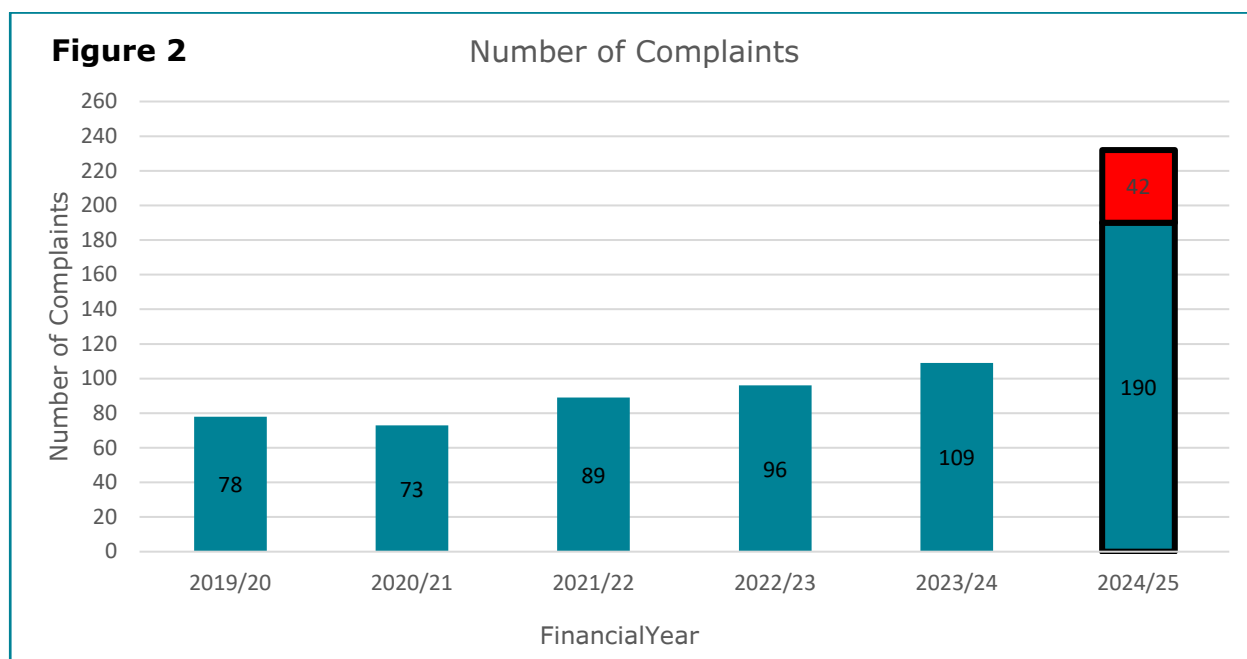
5.1 **Figure 1** below shows the total number of complaints received by year:



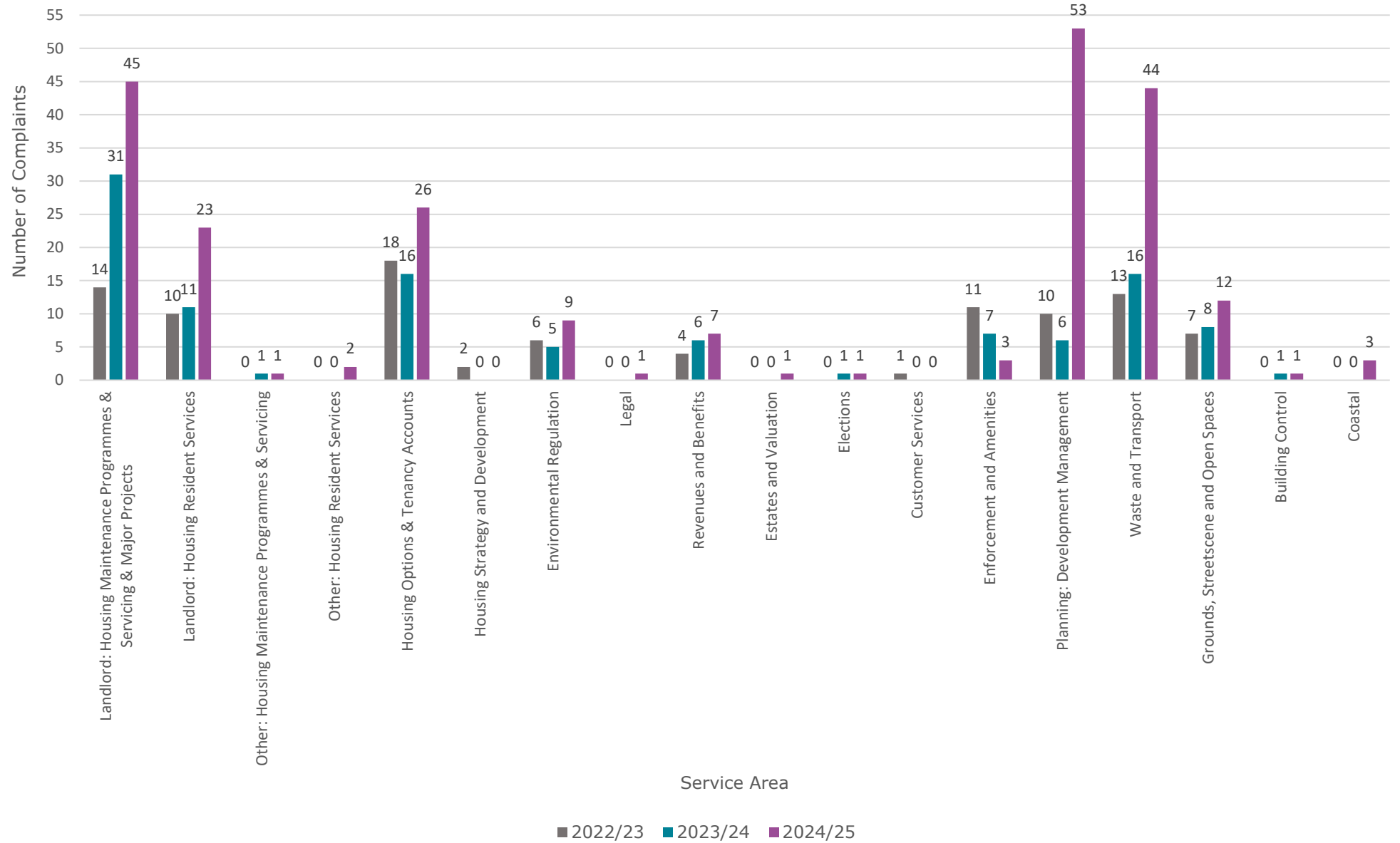
5.2 Between 2021/22 and 2022/23 there was an increase in complaints received of 7.9%, compared to an increase of 13.5% between 2022/23 and 2023/24. Between 2023/24 and 2024/25 there has been a significant increase in complaints received; 113% increase.

5.3 The possible reasons for this increase in complaints are considered throughout this report. However, in summary, the profile of complaints has been raised both nationally and locally through the introduction of the complaint handling codes (as detailed in section 2 of this report). We are also open and welcoming of complaints, recognising their importance in improving resident satisfaction with our services and in driving forward service improvements. Through our improved complaints service, we also hope that residents and tenants are more trusting that the Council will act on their views.

- 5.4 The total of 232 includes 3 complaints that were started at stage 2.
- 5.5 Whilst there was a small reduction in the number of complaints received in 2020/21, the general trend over the past 6 years has been an increase year on year. The percentage increase in complaints between 2019/20 and 2024/25 is 197%.
- 5.6 As a district Council we provide a wide variety of services to approximately 175,800 residents. In this context, 232 complaints represent only a tiny fraction of the number of resident interactions occurring each year. However, the Council, through its processes and approach, takes all complaints received as an opportunity to learn and improve services for the benefit of all residents.
- 5.7 In addition, the Council has received 42 separate complaints during 2024/25 that relate to one planning matter which has impacted the total number.
- 5.8 **Figure 2** below is an updated version of **Figure 1** with these planning complaints demarked:



- 5.9 **Figure 3** overleaf shows the total number of complaints received for 2022/23, 2023/24 and 2024/25 broken down by service area:

**Figure 3****Comparison of Complaints by Service Area**

5.10 There were three complaints dealt with by Housing Maintenance Programmes and Servicing and Major Projects and Housing Resident Service which were not from tenants, so these have been included in **Figure 3** separately (referenced as 'other').

5.11 The service areas with the largest increase in complaints between 2023/24 and 2024/25 are listed below:

- Planning: Development Management: 783% increase (83% increase with 42 complaints about a single issue removed).
- Waste and Transport: 175% increase.
- Landlord: Housing Resident Services: 109% increase.

5.12 The service areas with the largest number of complaints in total for 2024/25 are listed below:

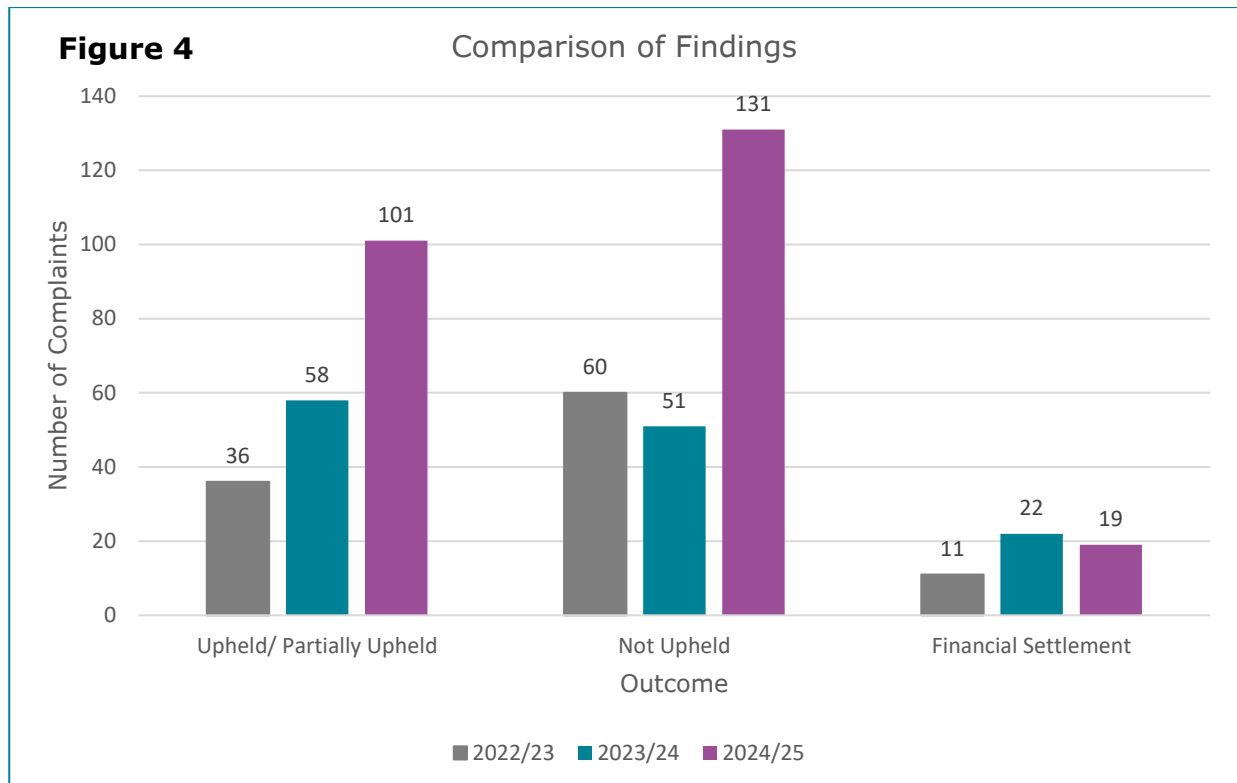
- Planning: Development Management: 53 (11 with 42 complaints about a single issue removed).
- Landlord: Housing Maintenance Programmes and Servicing and Major Projects: 45
- Waste and Transport 44.

5.13 Of the 44 Waste and Transport complaints received during 2024/25, 14 (32%) relate to the Council's garden waste service. From 1 April 2024, the Council introduced a new garden waste service using wheelie bins to over 20,000 households. This was a significant service change and during the first few months, after the new service was implemented, an increase in service requests and complaints was expected. Additionally, 9 (20%) complaints relate to issues with refuse bags being piled up and/or attacked by wildlife. A new domestic waste collection service is due to be rolled out across the District from summer 2025 which will involve the introduction of wheelie bins in accordance with our **Waste Strategy 2022 to 2027**. One of the benefits of this service change is that it should alleviate issues related to the collection of refuse bags.

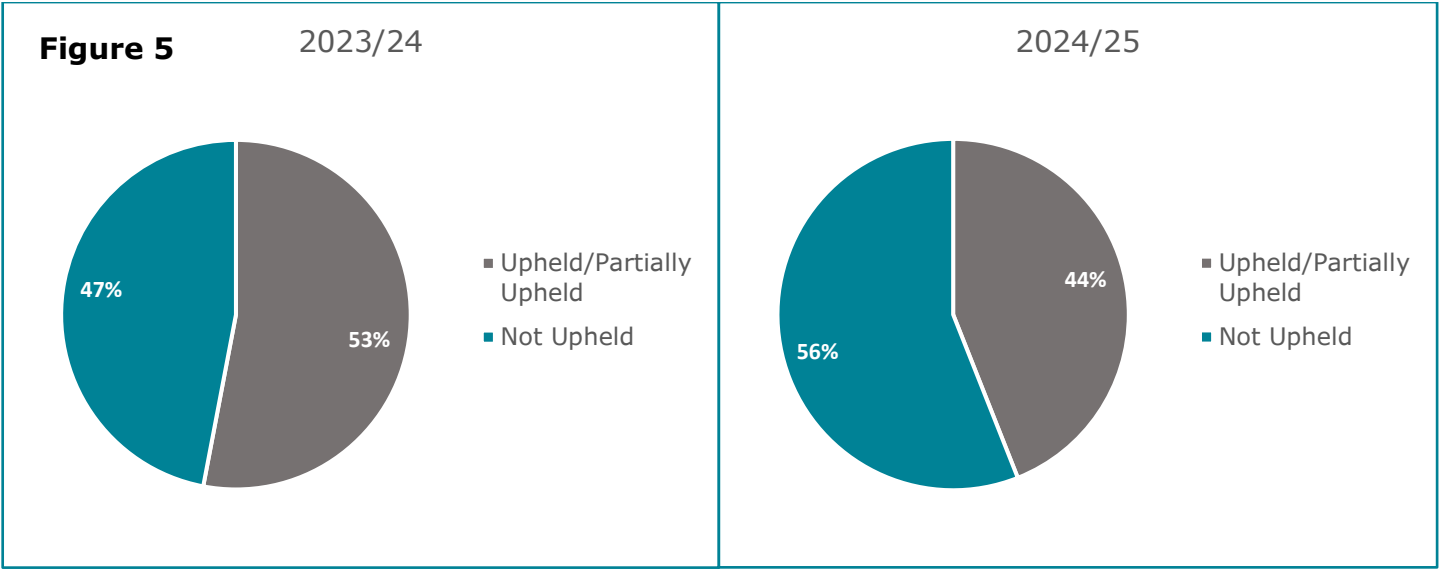
5.14 Most other service areas have seen an increase in the numbers of complaints for 2024/25 compared to 2023/24.

## Complaint findings

5.15 **Figure 4** below shows the number of complaints that were upheld or not upheld for 2022/23, 2023/24 and 2024/25. It also shows the number of complaints that resulted in some form of financial settlement (including goodwill/time and trouble payments and compensation for losses).



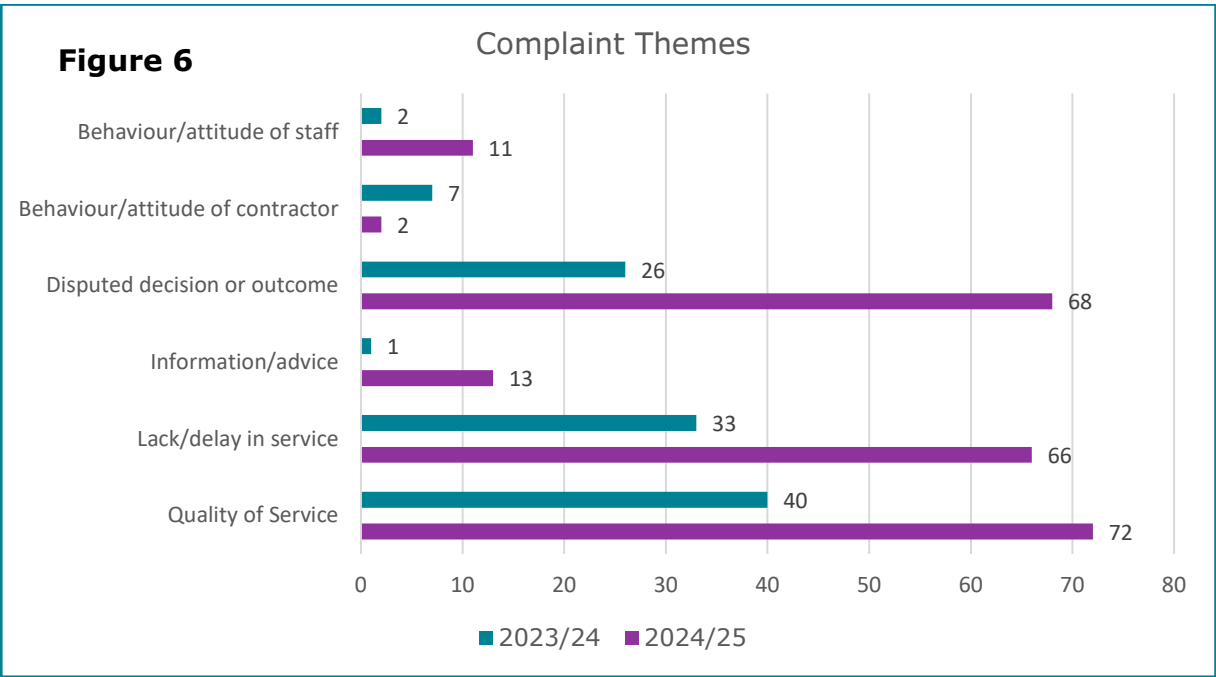
5.16 **Figure 5** overleaf shows the percentage of complaints that have been upheld/ partially upheld and not upheld in 2023/24 and 2024/25.



5.17 There has been a decrease in the proportion of complaints that have been upheld/partially upheld in 2024/25 (44%) compared to 2023/24 (53%).

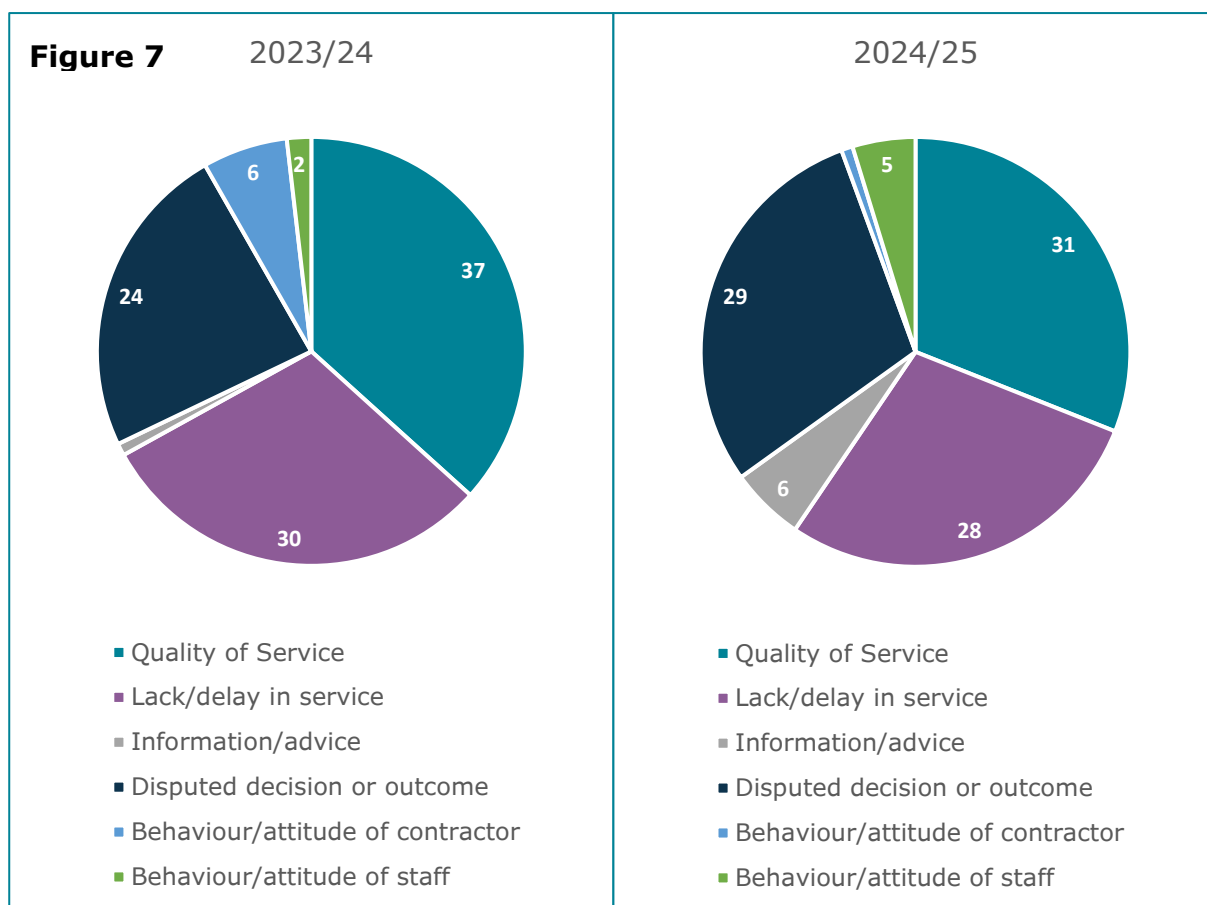
Themes

5.18 **Figure 6** below shows the complaints we have received in 2023/24 and 2024/25 categorised by theme.





5.19 **Figure 7** below shows the percentage breakdown of complaints between themes in 2023/24 compared to 2024/25.



5.20 The most common type of complaint in 2024/25 has related to the quality of service received (31% in 2024/25), followed by disputed decision/outcome (29%) and by lack of/delay in service (28%). This is similar to the breakdown for 2023/24. There are some instances where complaints relate to more than one issue, but these have been categorised based on the most prevalent theme.

5.21 It has been identified that poor communication is the theme most relevant to some of the complaints received which have been categorised as quality of service. We will take the following action to enhance our future reporting:

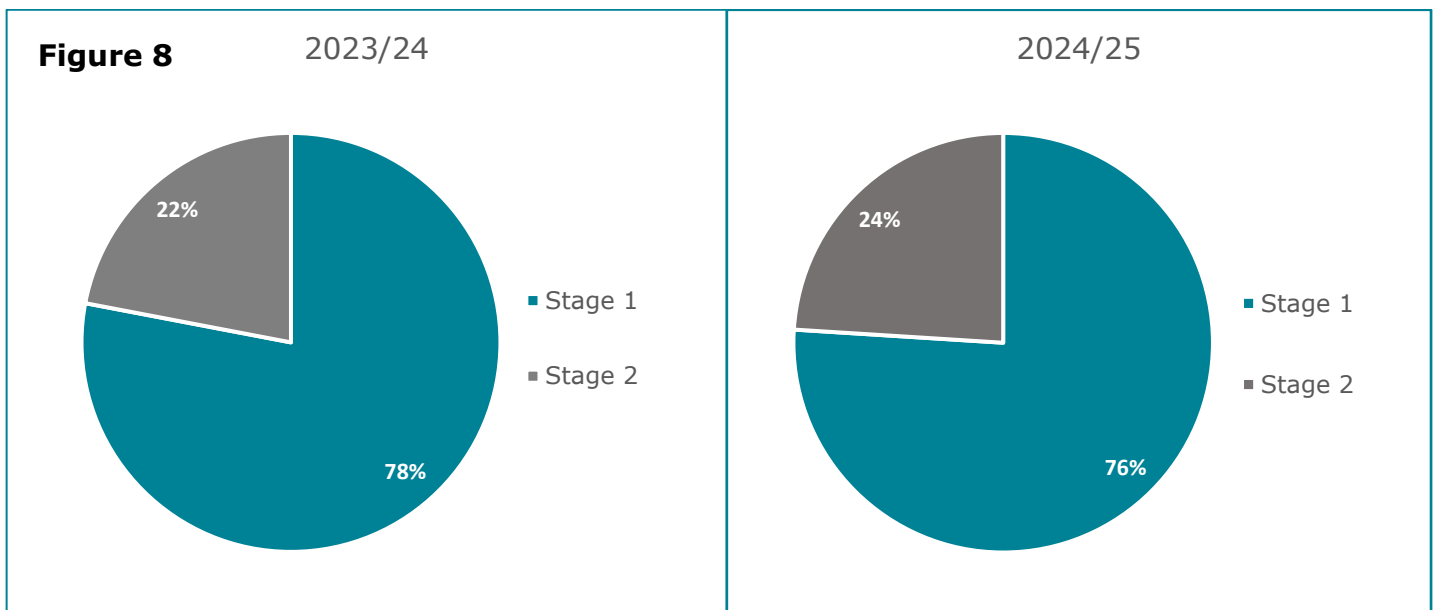
#### ACTION



- We will introduce a new theme for our record keeping of complaints for 2025/26 of 'poor communication'.

## Stages

5.22 **Figure 8** below shows a comparison of the percentage of complaints that were either resolved at stage 1 or escalated to stage 2 of the corporate complaints procedure in 2023/24 and 2024/25. This will not include the 3 complaints that were started at stage 2 but does include any stage 2 complaints that were escalated during 2024/25 (including where the stage 1 complaint may have been received in 2023/24).



5.23 The extent to which complaints escalate through the corporate complaints procedure is an important measure, as it is preferable to find resolutions for complainants at the earliest possible stage. As shown in **Figure 8**, the majority of complaints (76%) were resolved at stage 1 and therefore only 24% of all complaints were escalated internally, this is a slight increase when compared to 22% in 2023/24.

## Timescales

- 5.24 In 2023/24 100% of complaints were responded to within the timescales included in the corporate complaints procedure that was applicable at that time.
- 5.25 For 2024/25, 93% of stage 1 complaints and 100% of stage 2 complaints were responded to within the timescales included in the corporate complaints procedure as detailed at paragraph 3.2 above or with an agreed extension in accordance with the codes.

## 6. Complaints from tenants

### Summary - 2024/2025

**68**

Complaints  
received

**68 tenant  
complaints received**  
(compared with 42 in  
2023/24 which is an  
increase of 62%)



**Increase in  
Housing Resident  
Services complaints**  
(109% increase  
compared to  
2023/24))



**60% of complaints  
resolved at stage 1**  
(compared with 81%  
in 2023/24)



**96% of stage 1 and  
100% of stage 2  
tenant complaints  
responded to  
within procedure  
timescales**



**Most common  
theme for tenant  
complaints is lack  
of/delay in service**  
(46%)



**Common  
underlying causes  
of complaints are  
damp and mould  
and ASB**



**Lower proportion of  
complaints upheld**  
(59% compared to  
69% for 2023/24)

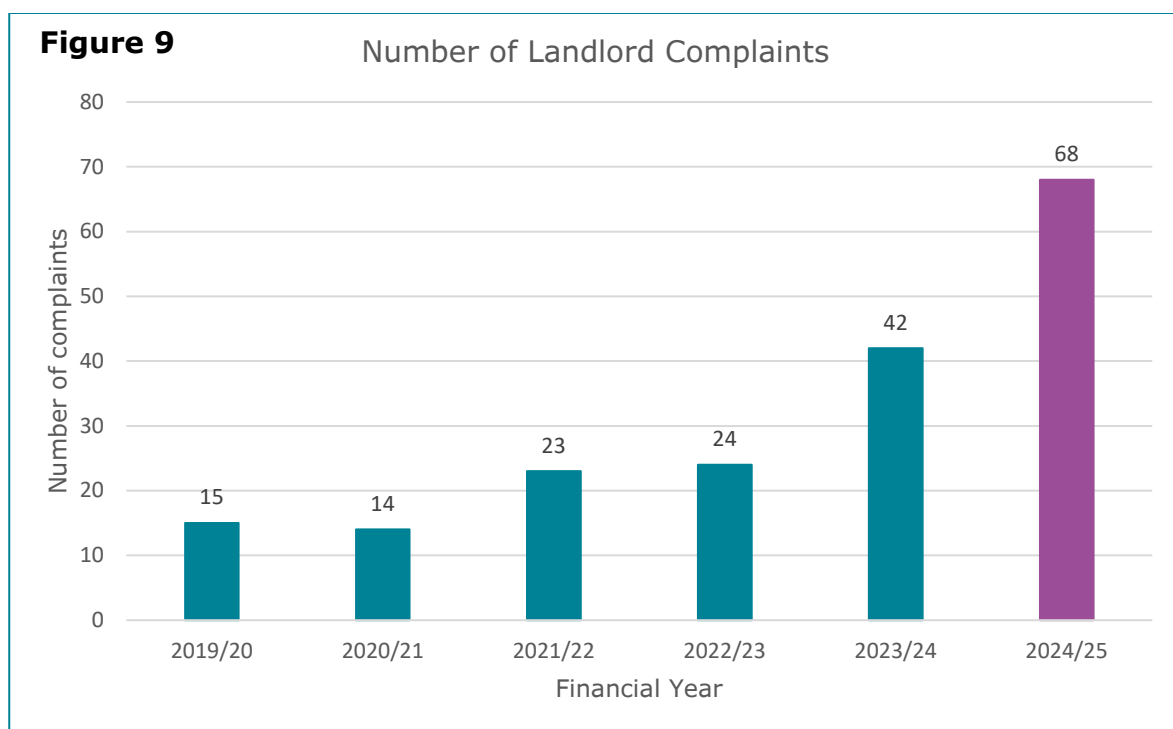


**Complaints  
procedure used as  
a form of  
alternative dispute  
resolution (ADR)  
for 6 disrepair  
claims**

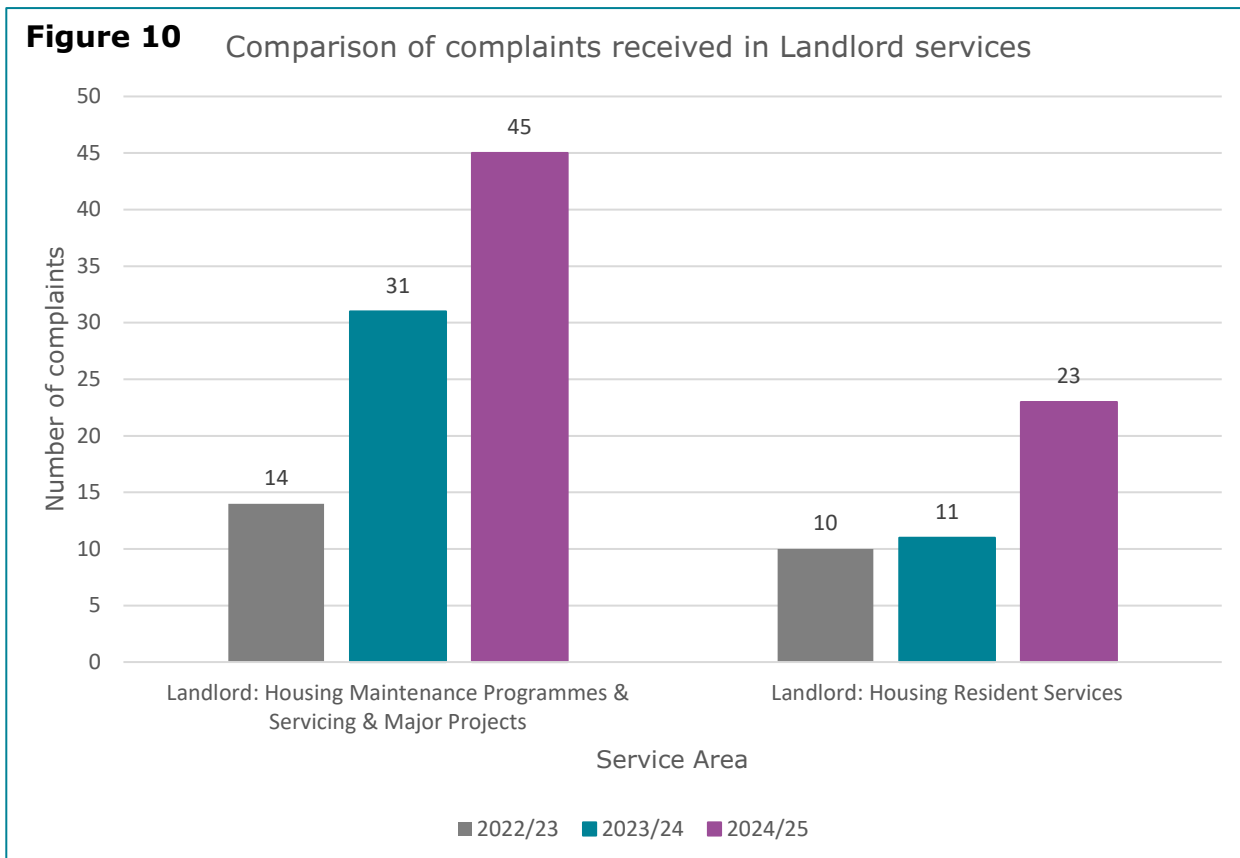
## Analysis

### Numbers

- 6.1 As of the end of 2024/25 we had 5,251 Council properties that we either owned or managed and let to tenants.
- 6.2 **Figure 9** below shows the total number of complaints received by year from tenants to us in our capacity as their landlord:



- 6.3 Between 2022/23 and 2023/24 there was an increase in complaints received from tenants of 75%. Between 2023/24 and 2024/25 there has been an increase in complaints received from tenants of 62%.
- 6.4 The Council has 5,251 properties. The total number of stage 1 tenant complaints in 2024/25 amounts to 12.9 complaints per 1,000 homes.
- 6.5 **Figure 10** overleaf breaks down the landlord services complaints received by service area.

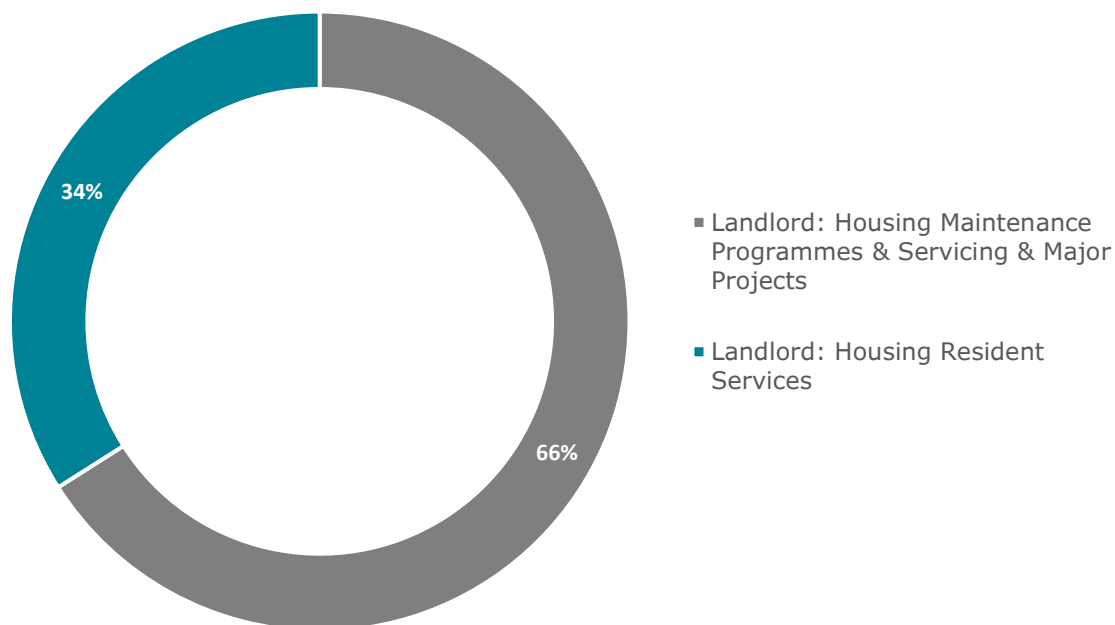


6.6 As outlined in section 5 above, there has been a 109% increase in Landlord: Housing Resident Services complaints between 2023/24 and 2024/25. In comparison, Landlord: Housing Maintenance Programmes and Servicing and Major Projects complaints increased by 45% in the same period.

6.7 As outlined in section 5 above (and in **Figure 3**), Landlord: Housing Maintenance Programmes and Servicing and Major Projects was one of the top three services that received the most complaints.

6.8 The percentage breakdown of complaints relating to landlord services for 2024/25 is shown in **Figure 11** overleaf:

**Figure 11** Percentage breakdown Landlord complaints 2024/25



6.9 In 2023/24 the percentage breakdown was 74% Landlord: Housing Maintenance Programmes and Servicing and Major Projects/ 26% Landlord: Housing Resident Services.

6.10 To future proof the Housing service and provide the necessary resources an aspirational and customer focussed service deserves, a housing restructure has been incrementally implemented from May 2024 and is now complete. This is summarised below:



- Creation of a Housing Policy Officer role to lead on service improvements, including responding to learning from complaints.
- Creation of a new Housing Resident Services Team to centralise all non-repair related tenant activity.
  - A new specialist Neighbourhood and ASB team have been created to respond directly and timely to incidents affecting tenants.



- A new Tenancy Sustainment Team was created to support tenants and offer more tailored support to resolve matters such as damp and mould in their homes.
- The gas and electrical safety teams have merged to form a more responsive service.
- Complaint learning and performance data is fed into a Housing service improvement plan alongside a drive to meet with Consumer Standard Regulations.

6.11 Housing services have taken positive steps during 2024/25 to promote and encourage tenant complaints. These actions are set out below:

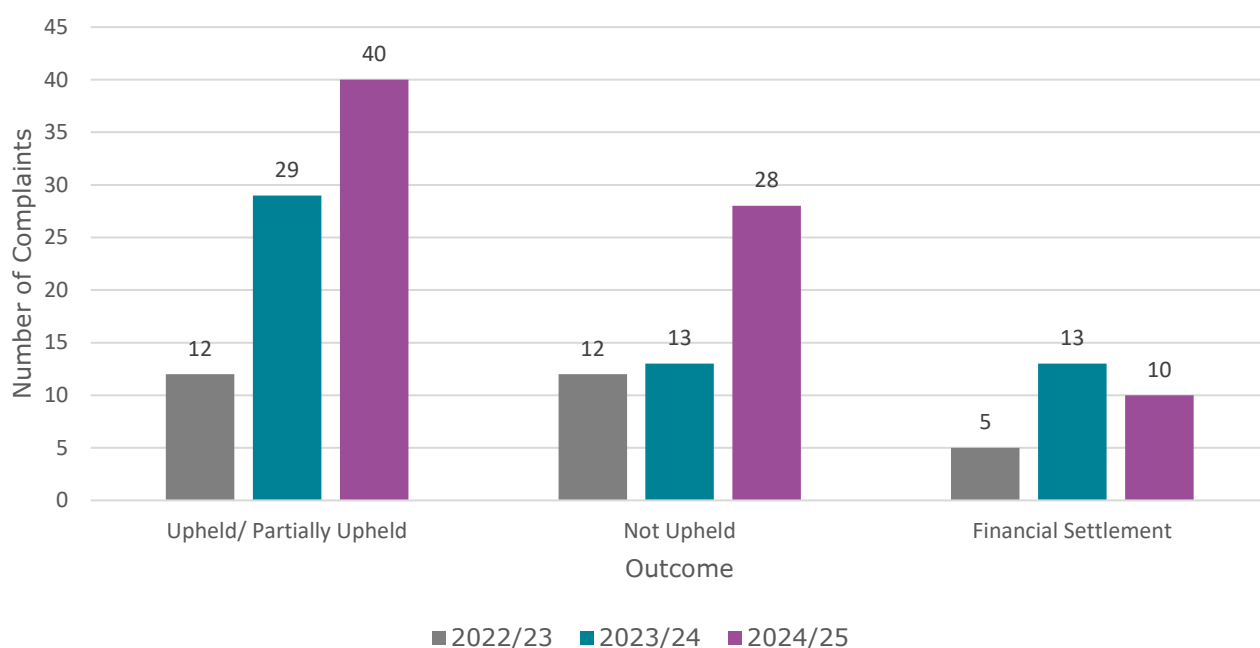


- Complaints and complaint handling has been a regular agenda items for our Tenant Involvement Group ('TIG').
- The TIG have been encouraged to support the message that we welcome complaints and complaint learning within their communities.
- We have highlighted our culture of welcoming and learning from complaints. This was included in Housing services' tenant magazine Hometalk (winter 2024) which is issued to all our Tenants and Leaseholders.
- All staff in Housing will appropriately signpost a tenant if a complaint or expression of dissatisfaction is raised through a data capture workflow.

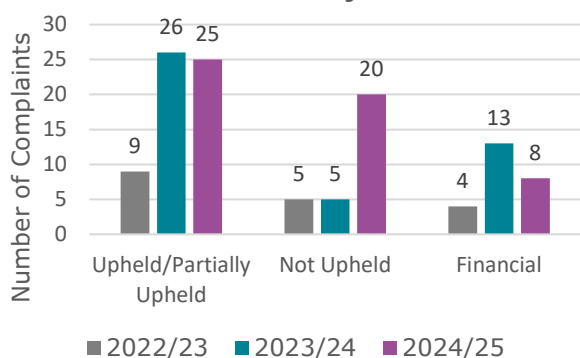
## Complaint findings

6.12 **Figure 12** below shows the number of tenant complaints that were upheld or not upheld for 2022/23, 2023/24 and 2024/25. It also shows the number of complaints that resulted in some form of financial settlement (including goodwill/time and trouble payments and compensation for losses). **Figures 13** and **14** show how these total figures are broken down between Landlord: Housing Maintenance Programmes and Servicing and Major Projects and Landlord: Housing Resident Services.

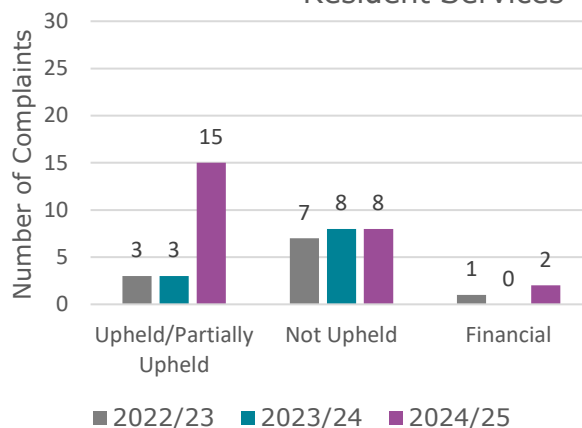
**Figure 12** Comparison of findings for tenant complaints



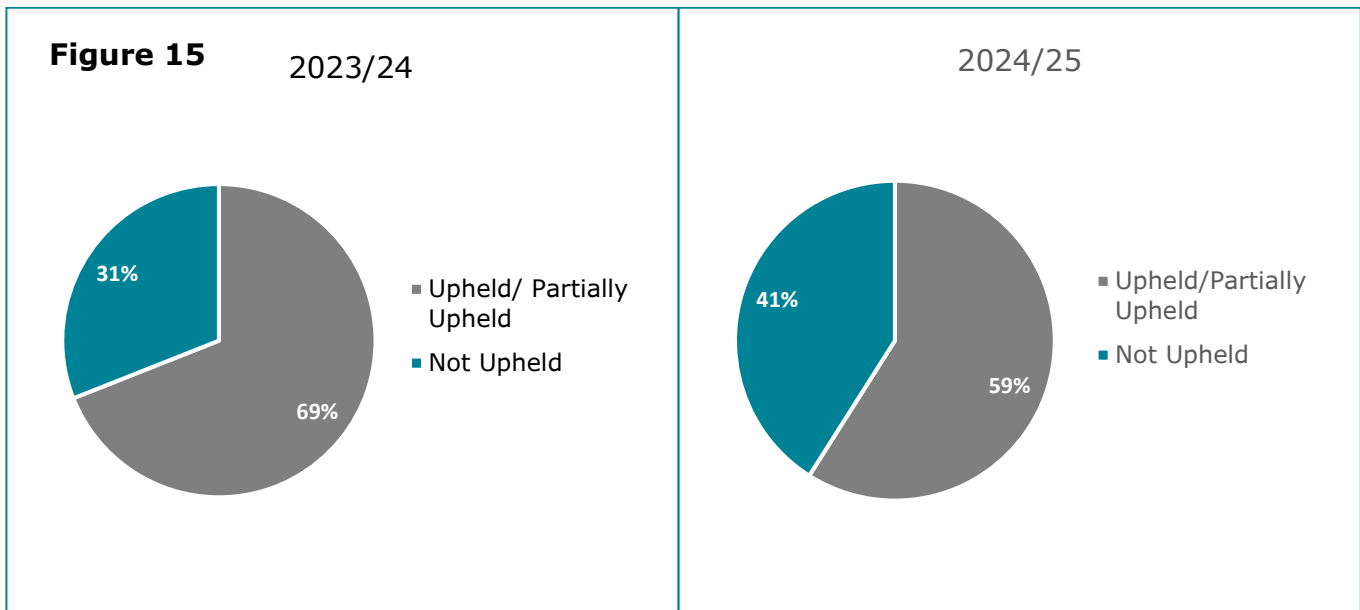
**Figure 13** Housing Maintenance, Programmes & Servicing & Major Projects



**Figure 14** Resident Services



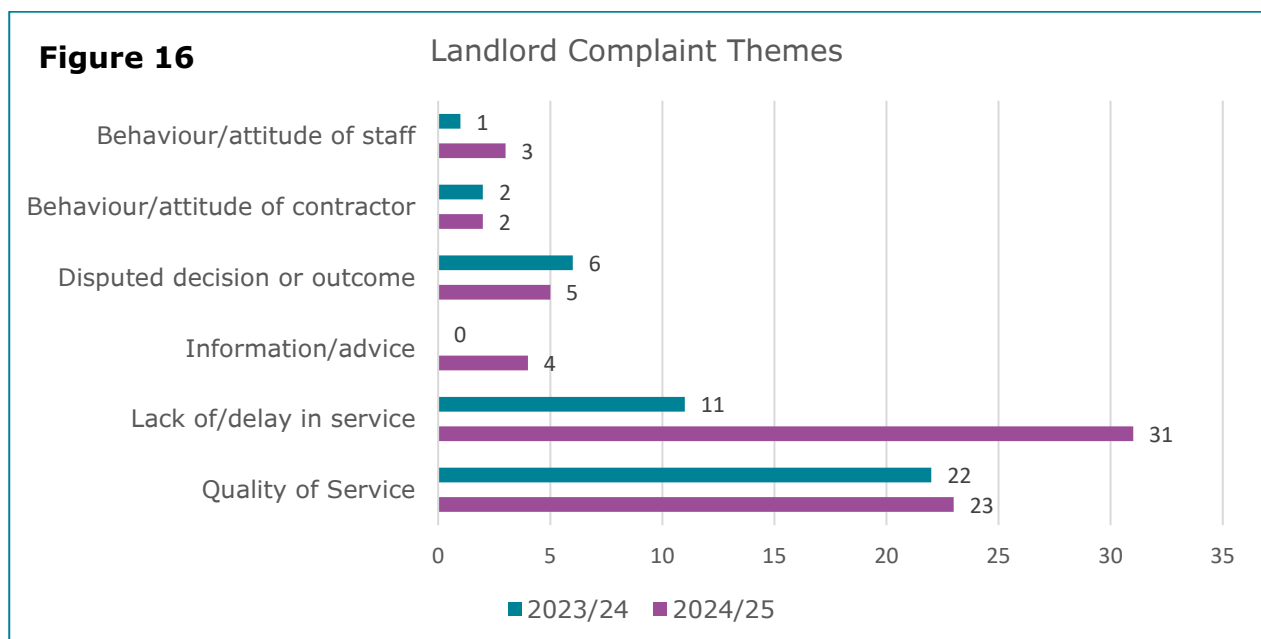
6.13 **Figure 15** below shows the percentage of tenant complaints that have been upheld/partially upheld and not upheld in 2023/24 and 2024/25.



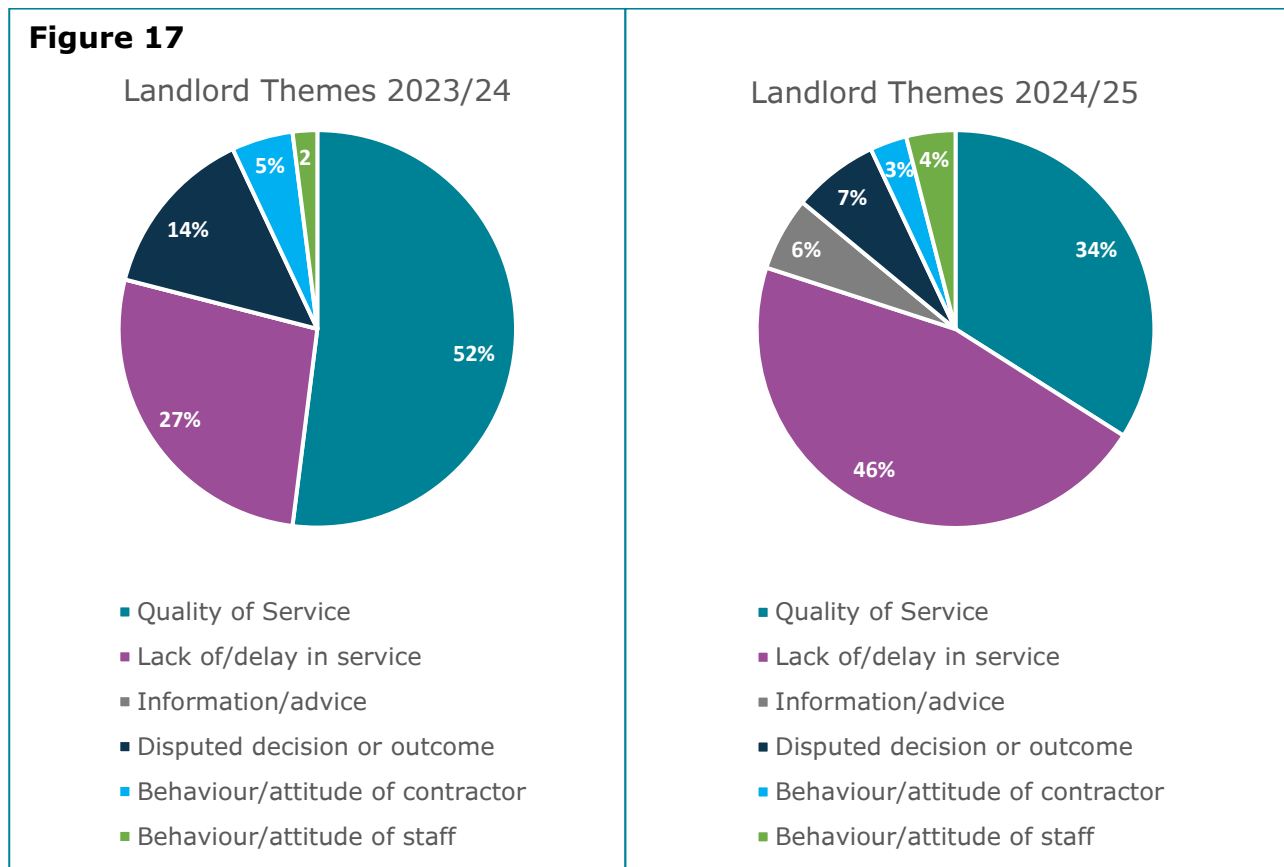
6.14 There has been a decrease in the proportion of tenant complaints that have been upheld/partially upheld in 2024/25 (59%) compared to 2023/24 (69%).

## Themes

6.15 **Figure 16** below shows the tenant complaints we have received in 2023/24 and 2024/25 categorised by theme.



6.16 **Figure 17** below shows the percentage breakdown of tenant complaints between themes in 2023/24 compared to 2024/25.



6.17 The most common type of tenant complaint in 2024/25 has related to lack of/delay in service (46%) followed by quality of service (34%). In 2023/24 the most common type of complaint related to quality of service (52%), followed by lack of/delay in service (27%). There are some instances where complaints relate to more than one issue, but these have been categorised based on the most prevalent theme.

6.18 As referred to in 5.21 above it has been identified that poor communication is the theme most relevant to some of the complaints received which have been categorised as quality of service. The following action will also apply to complaints from tenants:

#### ACTION



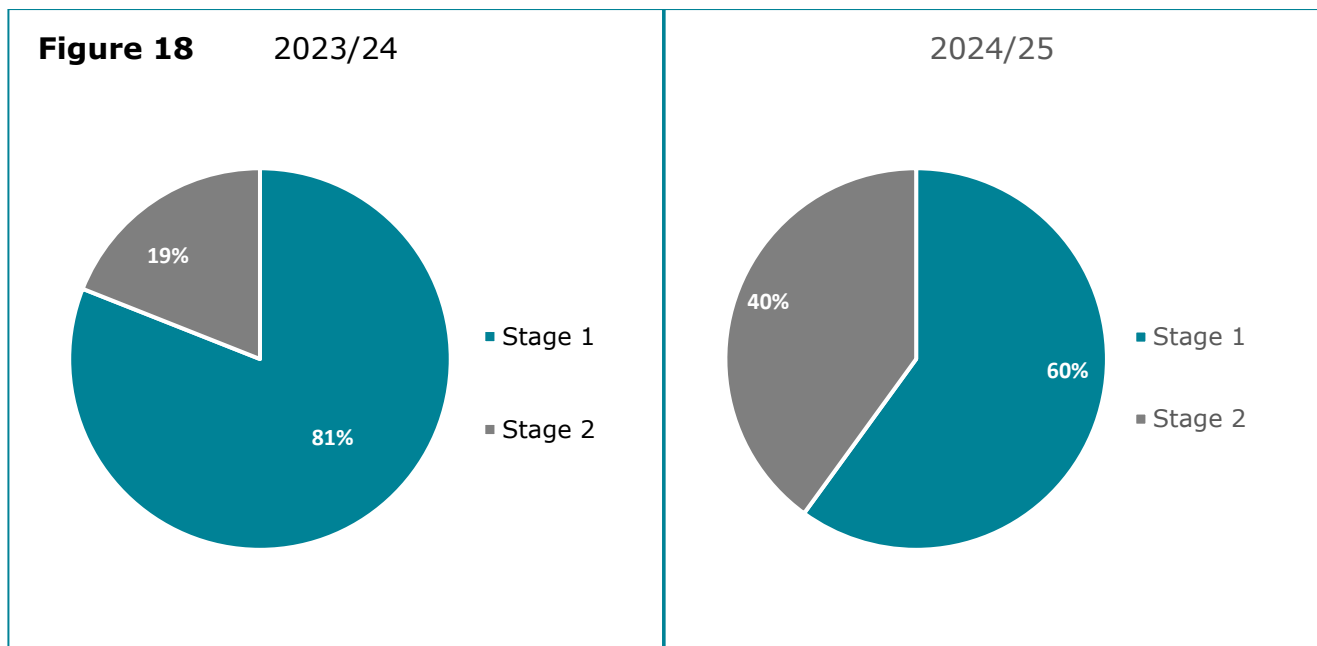
- We will introduce a new theme for our record keeping of tenant complaints for 2025/26 of 'poor communication'.

6.19 When reviewing the underlying cause of complaints made by tenants regarding Landlord: Housing Maintenance Programmes and Servicing and Major Projects matters it was identified that damp/mould was the underlying cause of 14 of these complaints (31%). Whilst Anti-Social Behaviour issues were the underlying cause of 11 complaints (48%) made by tenants regarding Landlord: Housing Resident Services.

6.20 In August 2024, the Council started using the complaints procedure as a form of alternative dispute resolution (ADR) in accordance with paragraphs 4.1 and 4.2 of the **Pre-Action Protocol for Housing Conditions Claims (England) – Civil Procedure Rules** in order to resolve disrepair claims. Since this time, 6 claims have been directed to the complaints procedure. This amounts to 13% of the Landlord: Housing Maintenance Programmes and Servicing and Major Projects complaints.

## Stages

6.21 **Figure 18** overleaf shows a comparison of the percentage of tenant complaints that were either resolved at stage 1 or escalated to stage 2 of the corporate complaints procedure in 2023/24 and 2024/25. This includes any stage 2 complaints that were escalated during 2024/25 (including where the stage 1 complaint may have been received in 2023/24).



6.22 60% of all tenant complaints in 2024/25 were resolved at stage 1, with 40% escalating to stage 2, this is an increase in the number of stage 2 complaints compared with 19% in 2023/24).

## Timescales

6.23 In 2023/24 100% of tenant complaints were responded to within the timescales included in the corporate complaints procedure that was applicable at that time.

6.24 For 2024/25, 96% of stage 1 tenant complaints and 100% of stage 2 tenant complaints were responded to within the timescales included in the corporate complaints procedure as detailed at paragraph 3.2 above or with an agreed extension in accordance with the codes.

## 7. Complaints not accepted

- 7.1 Our corporate complaints procedure sets out what will not be considered as a corporate complaint.
- 7.2 This includes, but is not limited to, complaints against councillors, anonymous complaints, cases where other legal rights of appeal/review exist, or cases where we or the complainant has started legal proceedings.
- 7.3 Where we decide that a complaint cannot be dealt with as a corporate complaint, we will let the complainant know and advise them of their right to take that decision to the relevant Ombudsman.
- 7.4 As a result of an action identified in the 2023/24 Annual Complaints Performance and Service Improvement Report we have:



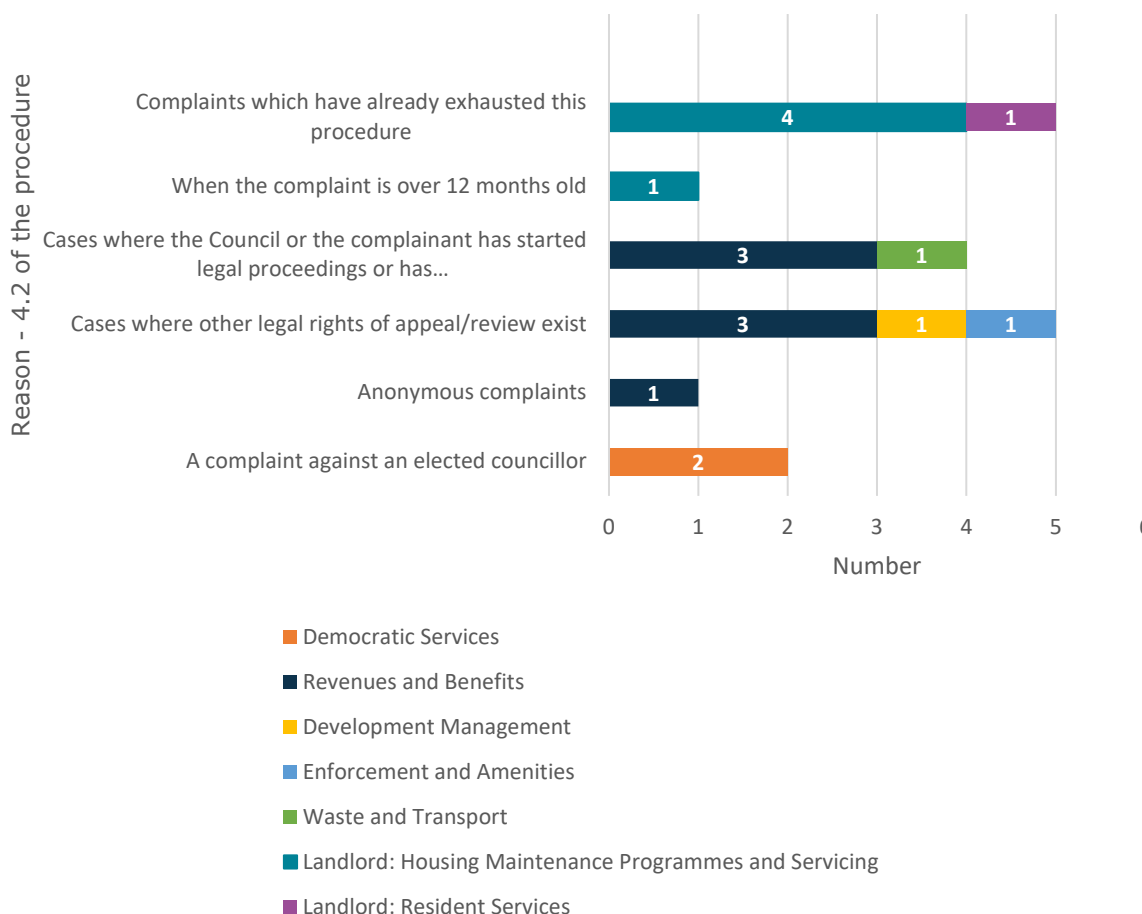
- Improved our record keeping for complaints that are not accepted

- 7.5 During 2024/25, there were 14 complaints that were either not accepted, or partially not accepted.
- 7.6 **Figure 19** overleaf shows a breakdown of the reason these complaints were not accepted by service area. Some complaints were not accepted for more than one reason:



**Figure 19**

## Complaints not accepted



7.7 Where a complaint is made relating to the conduct of an elected councillor, this is dealt with through a separate process. Further information regarding this is published on our website: [Complain against a councillor - New Forest District Council](#)

7.8 We also have complaints that are not dealt with as corporate complaints because they are service requests. Our procedure includes the following regarding service requests:

*'Service requests where an individual is requiring the Council to take action to put something right.*

- Such service requests will be recorded, monitored and reviewed regularly.*

- *Where an individual expresses dissatisfaction with the response to their service request, a complaint will be raised. Efforts to address the service request will continue.'*

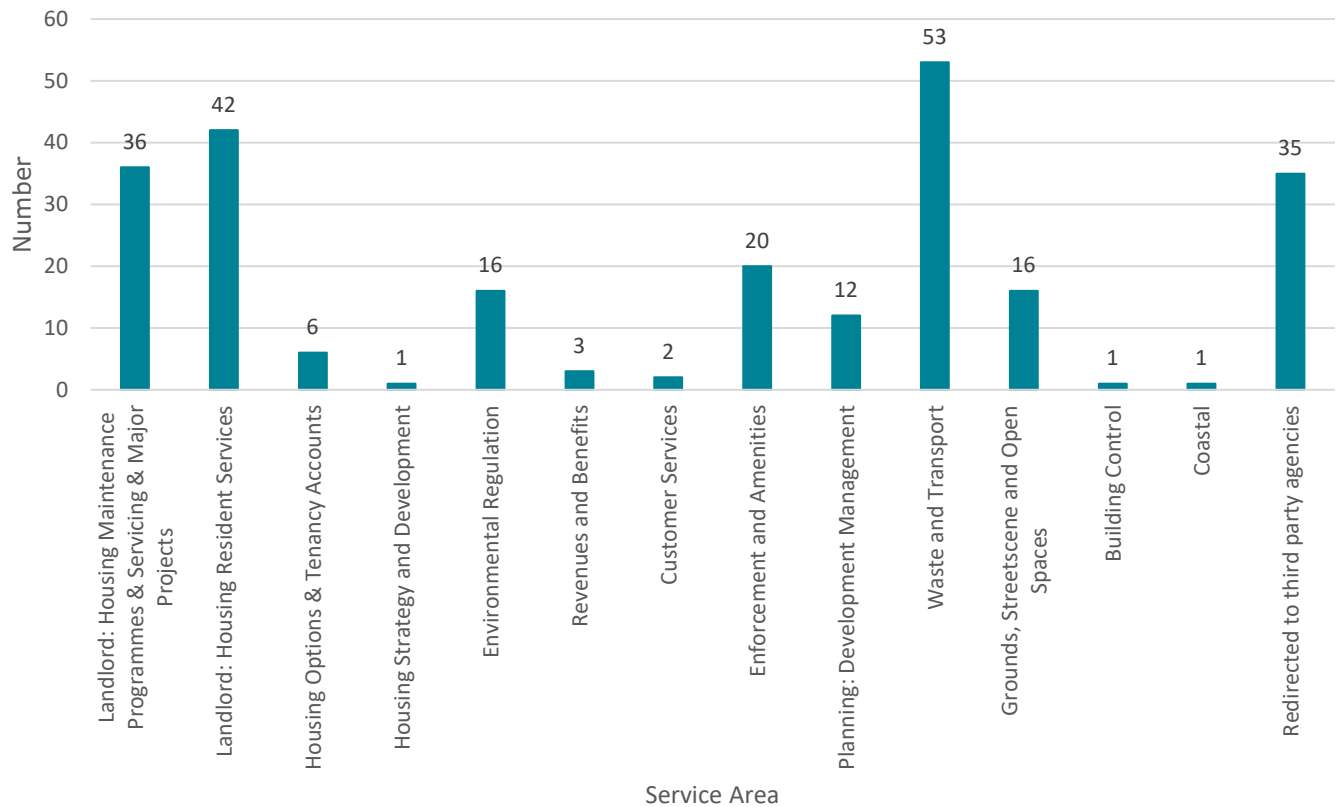
7.9 Some service requests are received by the Information Governance and Complaints Team for allocation to the relevant service.

7.10 As a result of an action identified in the 2023/24 Annual Complaints Performance and Service Improvement Report we have:



- Improved our record keeping for service requests.
- Improved our acknowledgement and allocation of service requests to the relevant services.
- Updated our template response to ensure individuals are provided with details of how to make a complaint if they are dissatisfied with a response to a service request.

7.11 **Figure 20** overleaf shows a breakdown of service requests which have been received by the Information Governance and Complaints Team and responded to by services.

**Figure 20****Service requests received 2024/25**

7.12 During 2024/25 the Information Governance and Complaints Team has received 244 service requests. This also includes 35 requests/complaints which have been redirected to third party agencies, such as Hampshire County Council or Housing Associations.

7.13 To review how effectively service requests are being dealt with, it is important to look into how many service request responses lead to a resolution of a resident's or tenant's issue. To assist with this, the following action has been identified.

**ACTION**

- We will add to our record keeping of service requests whether the matter is escalated to a corporate complaint.

7.14 Many service requests are also received directly by services. Below are ongoing actions to improve how we deal with service requests:

**ACTION**



- We will continue to work with services to ensure that service requests are handled consistently, recorded, monitored and reviewed and that learning from service requests is incorporated into service delivery.
- We will consider introducing a service request standards of service document to clarify responsibilities, expectations and timescales for response.

## 8. Tenant Satisfaction Measures review

### Background

- 8.1 As a registered provider of social housing, we are required to generate, report and publish tenant satisfaction measures ('TSMs') which are a core set of performance measures issued by the Regulator of Social Housing ('the Regulator'). The aim of the TSMs is to provide tenants with greater transparency about their landlord's performance and inform the Regulator about compliance.
- 8.2 The Council's response to the TSMs is either generated through management information or through tenant perception surveys which were conducted on our behalf by Acuity Research & Practice on a sample of 580 tenants (with an additional 13 partially completed interviews).
- 8.3 The TSMs are separate to this complaint performance and service improvement report. However, there are three TSMs which relate specifically to complaint handling. These are:

Code	Issue	How
CH01	Complaints relative to the size of the landlord	Generated from management information
CH02	Complaints responded to within Complaint Handling Code timescales	Generated from management information
TP09	Satisfaction with the landlord's approach to handling complaints	Collected from tenant perception surveys

- 8.4 The Council's TSM submission for 2024/25 (the same period covered by this report) will be viewable online in due course on: [Tenant engagement and participation - New Forest District Council](#)
- 8.5 We recognise the importance of the TSMs that relate to complaint handling and have chosen to incorporate them into this report as part of our performance and service improvement considerations. We are committed to making improvements where the TSMs have highlighted areas of low satisfaction.

## TSM results 2024/25

- 8.6 TSM CH01 shows that the number of stage 1 complaints made by tenants in the relevant stock type during the reporting year per 1,000 homes is 12.9 and the number of stage 2 complaints made by tenants in the relevant stock type during the reporting year per 1,000 homes is 5.1.
- 8.7 TSM CH02 shows that the proportion of tenant complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales is:
- Stage 1 – 96%
  - Stage 2 – 100%.
- 8.8 TSM TP09 provided the *'proportion of respondents who report making a complaint in the last 12 months who are satisfied with their landlord's approach to complaints handling'*. The results were 32% (this is an increase from 29% in 2023/24). This was based on 17% of the respondent sample reporting having made a complaint.
- 8.9 The question for TP09 included the mandatory wording *'Have you made a complaint to [your landlord] in the last 12 months?'* with the option of 'yes' or 'no' answers.
- 8.10 If the answer was 'yes', the mandatory following question was *'How satisfied or dissatisfied are you with [your landlord]'s approach to complaints handling?'* with the response options of:
- *Very satisfied*
  - *Fairly satisfied*
  - *Neither satisfied nor dissatisfied*
  - *Fairly dissatisfied*
  - *Very dissatisfied*
- 8.11 The Regulator of Social Housing's **Tenant Satisfaction Measures 2023/24 - Headline Report** provides useful benchmarking from the national results from 2023/24.
- 8.12 The table overleaf shows the average (median) results for low cost rental accommodation (LCRA) from the Headline Report, together with the Council's 2023/24 and 2024/25 results:

<b>TSM</b>	<b>Description</b>	<b>LCRA average 2023/24</b>	<b>Council results 2023/24</b>	<b>Council results 2024/25</b>
CH01	Number of stage one complaints received (per 1,000 homes)	42.5	7.9	12.9
CH01	Number of stage two complaints received (per 1,000 homes)	5.7	1.5	5.1
CH02	Proportion of stage one complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales (%)	82.3%	100%	95.59%
CH02	Proportion of stage two complaints responded to within the Housing Ombudsman's Complaint Handling Code timescales (%)	83.6%	100%	100.00%
TP09	Proportion of respondents who report making a complaint in the last 12 months who are satisfied with their landlord's approach to complaints handling	34.5%	29%	32%

## Analysis

- 8.13 The Headline Report shows that for CH01 the number of stage one complaints received (per 1,000 homes) for the Council in 2024/25 (12.9), is lower than the LCRA average for 2023/24 (42.5).
- 8.14 Whilst for CH02 the number of stage two complaints received (per 1,000 homes) for the Council in 2024/25 (5.1) is closer to the LCRA average for 2023/24 (5.7).
- 8.15 The Headline Report makes reference to landlords ensuring that it is easy for tenants to complain and that complaints are accurately recorded. It states this is particularly important for landlords that have recorded a low number of complaints for CH01 relative to other landlords. We are committed to ensuring that complaints are appropriately logged.



8.16 A comparison of the number of housing complaints recorded and the TSM results for TP09 indicates that tenants are perceiving that they are making a 'complaint', of some description (17% of the sample), which could be an expression of dissatisfaction, but that the Council is not always recording or treating this as a formal complaint. We have already taken some steps to improve how we handle service requests and further ongoing actions are planned to try and improve how service requests are dealt with which may assist with this going forward. There is a firm commitment from the Council to address the feedback.

8.17 As a result of an action identified in the 2023/24 Annual Complaints Performance and Service Improvement Report:



- We have introduced a feedback form for complainants to complete follow receiving a stage 1 or stage 2 complaint response.

8.18 We will continue with the actions below to improve our complaints handling:

**ACTION**



- We will continue to progress the introduction of training for all staff on complaint handling, recognising complaints, the difference between service requests and complaints and the importance of learning from complaints.
- We will provide service specific training for services most likely to receive or deal with complaints, including Housing Services and Customer Services.

## 9. Learning

9.1 We recognise the importance of learning from complaints. Below are some examples of service improvements that have been made as a result of complaints dealt with in 2024/25:

### Corporate

#### **Case Study 1 – Environment and Regulation - Licensing**

##### **The complaint**

A complaint was made regarding delays in the processing of a pleasure boat licensing application and requesting additional information from the applicant.

##### **What did we do?**

It was considered that the application was processed in a reasonable time, but the review of the complaint identified that the Council's website did not inform applicants of response and processing times. Further information was added to the website and internal guidance updated to require contact with an applicant if required information is missing from an application.

##### **What is the ongoing service improvement?**

Increasing transparency in the licensing process and managing applicants' expectations will improve the standard of service for pleasure boat licence applicants.

#### **Case Study 2– Environment and Regulation - Environmental Protection**

##### **The complaint**

A complaint was received regarding the handling of alleged noise nuisance.

##### **What did we do?**

Whilst it was considered that the investigation had been handled appropriately, it was identified that further information regarding the statutory nuisance investigation process should be published on the Council's website.

##### **What is the ongoing service improvement?**

Increasing transparency in the statutory nuisance investigation process will improve the customer experience.

### **Case Study 3 – Housing Options and Tenancy Accounts – Homesearch**

#### **The complaint**

A complaint was received stating there was a lack of support offered from the housing options team. The complaint also referred to limited opening hours of the Homesearch telephone line and criticised the tone and formality of language used in correspondence.

#### **What did we do?**

Some aspects of the complaint were not upheld, but the housing register application was reassessed. In addition, it was acknowledged that the opening hours of the Homesearch telephone line were limited so these have now been increased by an extra afternoon each week. The wording of the standard letters is also in the process of being reviewed and updated.

#### **What is the ongoing service improvement?**

The increase in the Homesearch telephone line opening hours and, when finalised, the amendments to the standard letters will benefit all applicants accessing and understanding the Homesearch service.

### **Case Study 4 – Housing Options and Tenancy Accounts – Homelessness**

#### **The complaint**

A complaint was received stating that interim accommodation provided, and other offers of accommodation made, were not suitable because they did not take into consideration the applicant's medical needs and future prognosis, including the need for ground floor accommodation.

#### **What did we do?**

The complainant was placed in suitable accommodation prior to the conclusion of the complaint. The complaint response did acknowledge that further medical evidence could have been proactively requested on what type of accommodation would be suitable based on the known medical conditions and this has been incorporated into processes going forward. The Council's standard letter requesting proofs in support of Homesearch applications will be reviewed to consider whether proofs should be requested in all cases relating to the type of accommodation needed due to medical conditions.

#### **What is the ongoing service improvement?**

This will improve the standard of service and offers of accommodation made to those individuals who have a medical condition that affects which properties may be suitable.

## **Case Study 5 – Environment and Regulation - Environmental Protection**

### **The complaint**

A complaint was received regarding the handling of alleged noise nuisance.

### **What did we do?**

It was identified that the complainants were deemed unreliable witnesses based on evidence included in noise recordings, and the noise nuisance case was closed. However, on review, this outcome was not conclusive. Going forward, all officers who investigate and peer review noise cases have been informed, based on the legal advice obtained, on how they should manage situations where audio recordings made by complainant's present questionable evidence. This includes reviewing all the evidence with the team manager, determining the outcomes from the evidence in question and seeking advice from the legal department if required.

### **What is the ongoing service improvement?**

Having more consistent guidance and checking processes will assist with ensuring noise nuisance cases are not incorrectly closed.

## **Case Study 6 – Grounds, Street Scene and Open Spaces – Corporate Trees**

### **The complaint**

A complaint was received regarding the standard of service provided by tree contractors acting on behalf of the Council.

### **What did we do?**

It was identified that works were not carried out by the contractor within the agreed timescales or in accordance with instructions resulting in multiple attendances to the complainant's property being required. The learning from this has been incorporated into the Council's tree contract performance management processes, including ensuring that all evidence of works are appropriately recorded on the Council's tree management software.

### **What is the ongoing service improvement?**

Ensuring contractors meet requirements and proactively managing contract performance through regular meetings will improve the standard of service to residents.

## Complaints from tenants

### **Case Study 7 – Landlord: Housing Maintenance, Programmes and Servicing**

#### **The complaint**

A complaint was received from a tenant relating to repair issues at their property. This included that some agreed drainage works that were identified several years ago had not been completed and that other issues had been raised on multiple occasions before being rectified.

#### **What did we do?**

We apologised for the delays and steps were taken to progress these works. Steps have been taken to avoid repair works being missed through the introduction of more comprehensive housing repairs management software. We have introduced reporting to raise alerts for multiple repair requests or repeat repair requests so that issues can be resolved sooner.

#### **What is the ongoing service improvement?**

Improved software and alerts will increase repair requests being actioned without delay.

### **Case Study 8 – Landlord: Resident Services**

#### **The complaint**

A complaint was made that the Council was trying to recover rent for a period of time after the tenant believed they had terminated their tenancy and left the property, but had not left vacant possession. The reason for leaving the property related to concerns about the behaviour of a person who remained in the home.

#### **What did we do?**

An update was added to standard letters advising tenants of the requirements regarding the end of tenancy process to include vacant possession. Steps will be taken to review and update policies and procedures relating to end of tenancy and vacant possession, particularly where disclosures regarding the behaviour of someone living at the property are made.

#### **What is the ongoing service improvement?**

Having updated policies and procedures will improve consistency and the support/signposting provided to tenants. Making sure information provided to tenants is up to date and complete will assist with managing expectations.

### **Case Study 9 – Landlord: Resident Services – Disabled Facilities Grants (DFG)**

#### **The complaint**

A complaint was received about the standard of service related to a DFG application for adaptations to a Council property.

#### **What did we do?**

Whilst the complaint was not upheld, it did result in a review of procedures. Where cases are open for a long period of time, one to one reviews now take place with officers to identify if any further steps can be proactively taken to progress works. These cases are now flagged at 6 months for this review process.

#### **What is the ongoing service improvement?**

Applicants will be kept up to date and progress will be actively monitored on cases that are not concluded in the initial 6-month period to avoid delays.

### **Case Study 10 – Landlord: Resident Services – Disabled Facilities Grants (DFG)**

#### **The complaint**

A complaint was received relating to the standard of service provided by DFG contractors engaged to carry out adaptations to a Council property.

#### **What did we do?**

The feedback provided by the complainant identified several issues that needed to be considered and feed into a wider review of the Council's DFG processes. This review will look at the whole DFG process, including the information provided to applicants, costs, estimates, and payment criteria, how contractors are selected, the terms of reference provided to contractors, information that should be passed to the relevant contractor related to the particular needs of a DFG applicant, further consideration of when specialist contractors may be required and what additional support the Council can provide to its tenants who go through the DFG process, particularly where adaptations involve significant building works and disruption.

#### **What is the ongoing service improvement?**

The outcome of this DFG review will improve the all-round service received by future DFG applicants.

## Case Study 11 – Landlord: Resident Services

### The complaint

Several complaints have been received relating to our response to Anti-Social Behaviour ('ASB') reports.

### What did we do?

We have now introduced an Anti-Social Behaviour Strategy setting out the Council's priorities and approach to preventing and improving the co-ordinated response to housing related ASB. In support of this, a new Housing Anti-Social Behaviour Policy has been adopted. There has been a restructure of Resident Services team responsibilities and a dedicated ASB Team is now in place. New procedures are also followed, and template letters are being reviewed.

### What is the ongoing service improvement?

The improvements across the management of ASB will improve how ASB complaints are handled by the service, improving the experience for our tenants.

9.2 As a result of an action identified in the 2023/24 Annual Complaints Performance and Service Improvement Report:



- We now ask complaint responders to clearly identify where a complaint has been upheld and what the learning from the complaint is.
- We have updated how we record complaints to improve how we capture and follow up learning and to assist with reporting.
- We have introduced periodic meetings with senior managers to consider complaint trends, complaints decided, learning identified and service improvements.

9.3 To improve how learning from complaints is captured and implemented into meaningful service improvements, we plan to take the following action going forward:

### ACTION

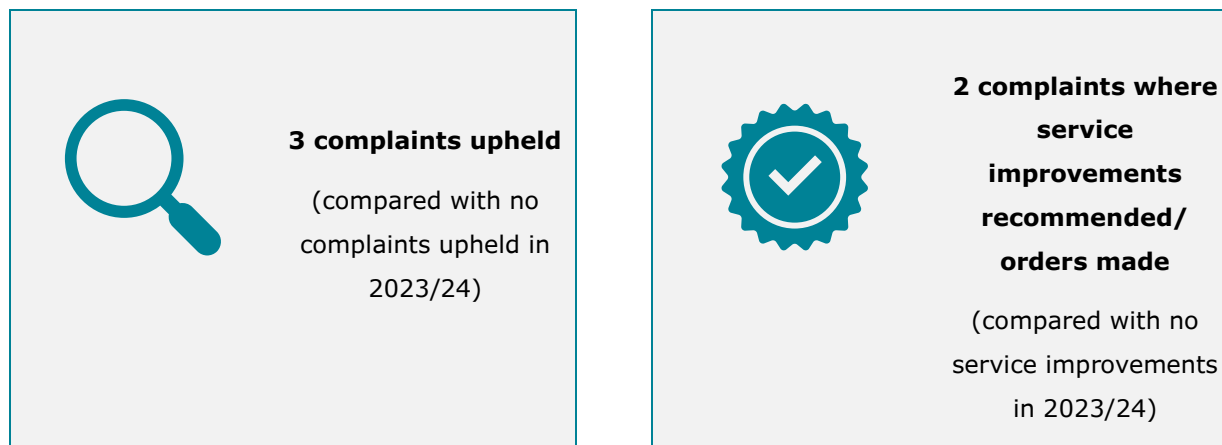


- We will support services with the development of any proposed service improvement plans.



# 10.Ombudsman decisions

## Summary - 2024/2025



## Right to escalate

- 10.1 If complainants are not satisfied with our response to their complaint, when they have exhausted our internal corporate complaints procedure, they can escalate their complaint to either the Local Government and Social Care Ombudsman or, for tenants, the Housing Ombudsman.
- 10.2 Both Ombudsman services will generally not investigate complaints unless the complainant has completed our internal procedure. However, complainants can contact the relevant Ombudsman at any stage during their complaint.

## Local Government and Social Care Ombudsman

### Annual review letter

- 10.3 The Local Government and Social Care Ombudsman provides us with an annual review letter each year in July which includes a summary of complaint statistics for complaints which have escalated to them. This covers the preceding financial year.
- 10.4 All our annual review letters that have been received to date are published on the Local Government and Social Care Ombudsman's website: **Local Government and Social Care Ombudsman - New Forest District Council Annual Reviews.**

10.5 Our performance is also viewable on the Local Government and Social Care Ombudsman's website: [Local Government and Social Care Ombudsman - New Forest District Council Performance](#)

## Investigations and findings

10.6 We are not always aware of every complaint or enquiry that is made to the Local Government and Social Care Ombudsman.

10.7 Our records show that there have been 6 complaints decided by the Local Government and Social Care Ombudsman in 2024/25 related to the Council. These decisions are published on the Local Government and Social Care Ombudsman's website: [Local Government and Social Care Ombudsman - Decisions - New Forest District Council](#) Of these, 4 were closed after initial enquiries, and 2 were subject to detailed investigations and upheld. Some of these complaints will have been considered by us in the 2022/23 period.

10.8 Summaries of the complaints that were investigated are set out below:

Service area	Complaint	Summary and outcome	Agreed action
Housing Options and Tenancy Accounts	Mr X complains the interim accommodation provided by the Council was unsuitable for his needs because of his reduced immune system. He also complains communication with the housing officer was poor.	We will not investigate Mr X's complaint that the interim accommodation provided by the Council was unsuitable for his needs. This is because the Council has agreed to resolve the complaint early by providing a proportionate remedy for the injustice caused by the faults accepted.	I therefore asked the Council to consider remedying the injustice caused by the faults accepted by: <ul style="list-style-type: none"> <li>Apologising to Mr X for the distress and frustration caused by the faults accepted.</li> <li>Make a payment of £300 per month to recognise the time Mr X spent in unsuitable accommodation. A total of £900.</li> <li>Make a payment of £100 to recognise the distress and frustration caused by the Council's poor communication.</li> </ul>

Community Safety and Support	<p>Mr B, complained the Council:</p> <ul style="list-style-type: none"> <li>failed to put in place reasonable adjustments to enable him to comfortably attend a meeting which took place in December 2022; and</li> <li>failed to act on antisocial behaviour he experienced from his neighbour.</li> </ul>	<p>There is no fault in how the Council dealt with the antisocial behaviour concerns Mr B raised. The Council failed to address the concerns Mr B raised before the meeting and delayed dealing with his logs of anti social behaviour. An apology, drawing up a policy on applying reasonable adjustments and a reminder to officers is satisfactory remedy.</p>	<p>Within one month of my decision the Council should:</p> <ul style="list-style-type: none"> <li>apologise to Mr B for the frustration he experienced due to the faults identified in this decision. The Council may want to refer to the Ombudsman's updated guidance on remedies, which sets out the standards we expect apologies to meet;</li> <li>remind officers of the need to consider whether a reasonable adjustment is required if a resident raises concerns;</li> <li>remind officers of the need to ask the residents' permission to share correspondence received by one department with other departments when the correspondence includes information relevant to both.</li> </ul> <p>Within four months of my decision the Council should draw up a policy on applying reasonable adjustments.</p>
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## Housing Ombudsman

### Performance report

10.9 The Housing Ombudsman publishes individual landlord performance reports for landlords with 5 or more findings for a particular financial year. These reports are available on the Housing Ombudsman's website: [Housing Ombudsman - Landlords Archive](#)

10.10 The Housing Ombudsman has not yet published its reports for 2024/25, so the information available on its website relates to 2023/24. As we had no determinations made by the Housing Ombudsman in the period 2023/24 there is no report relating to the Council currently published on the Housing Ombudsman's website.

### Investigations and findings

10.11 As with the Local Government and Social Care Ombudsman, we are not always aware of every complaint or enquiry that is made to the Housing Ombudsman.

10.12 Our records show that there has been 1 complaint decided by the Housing Ombudsman in 2024/25 related to the Council. This decision will be published on the Housing Ombudsman's website: [Decisions Archive - Housing Ombudsman](#). This complaint was considered by us in the 2022/23 period. A summary of this complaint is included overleaf:

Service area	Complaint	Summary and outcome	Agreed action
Housing Maintenance Programmes and Servicing and Complaints	<p>1. The complaint is about the landlord's response to a gas leak.</p> <p>2. The Housing Ombudsman also considered the complaint handling.</p>	<p>There was no maladministration by the landlord in response to the resident's reports of a gas leak.</p> <p>There was a service failure by the landlord in its complaint handling.</p>	<p><b>Order</b></p> <p>The landlord should apologise to the resident for its complaint handling failing.</p> <p><b>Recommendations</b></p> <p>The landlord should:</p> <p>a. Pay the resident the £520 compensation offered in its level 1 response.</p> <p>b. Review training requirements with its out of hours team to prevent communication delays where a gas safety concern has been reported outside of usual business hours.</p>

# 11.Compliments

11.1 It is important to recognise the good work that officers of the Council do, as well as identifying where improvements can be made.

11.2 As a result of an action identified in the 2023/24 Annual Complaints Performance and Service Improvement Report we have:



- Raised awareness with staff about what to do if they receive a compliment.
- Introduced an online form for members of the public to submit compliments and positive feedback.

11.3 Managers and officers are encouraged to pass on compliments and positive feedback that has been received. A compliments inbox ([compliments@nfdc.gov.uk](mailto:compliments@nfdc.gov.uk)) has been set up to assist with this, along with an online form (**Compliments and Positive Feedback Form**) for members of the public.

11.4 Below are anonymised examples of the positive feedback that has been received by some of our service areas in the period 2024/25.

## Landlord: Housing Maintenance, Programmes and Servicing

"Many thanks for the repair carried out this morning by xx. He has done his usual great job, very much appreciated".

"Tenant called and said 'He ... was very happy with the service and input he received from us...'"

"A big thank you for the fencing work we have just had completed"

"I just wanted to say that the team carrying out the work on the soakaway have done an excellent job."

"Tenant called in she is thrilled and really full of praise for the works we completed today. She would like to pass on her thanks to the worker and commend his wonderful craftsman ship."

"The tenant from xx has called in to say she is really happy with works xx has done today and how nice polite and helpful he has been 😊"

"Whilst doing building checks at xx, I bumped into the tenant in xx, who has lived at this address for 10 years. He praised me and NFDC for the work we are doing and said he and his family was 110% happy with where they are and the work we do – we fix problems very quickly"

"I had workman here Monday I must say xx so polite and helpful ... He is a lovely man! Please pass this onto his boss please!"

"Tenant has called in to the Hub this morning to pass on her thanks and compliments to our operative xx for all his hard work in the back garden, she is extremely grateful."

"I would also inform you that the workman who came was absolutely wonderful he worked so quickly and soon was able to find the problem after many tries. Definitely someone to keep on your 'book's'.

Thank you again."

"Compliments given over the phone to operative xx for a job he was on yesterday, at xx Tenant noted xx is a very hardworking man and should get recognition as such.

All is done to a very high standard..."

"... I wanted to say that he was both very friendly and efficient at his job; he made me feel very much at ease, and also made sure to explain what he'd just done afterwards clearly. He basically did everything just the way you'd hope it would be, and as such I thought it important to pass on my compliments, and give full credit where it's due. If you could pass on these thoughts, thanks and best wishes, it would be much appreciated..."

"I would like to thank the three guys who came one last week and two today who were lovely guys and did a great job. Especially thank you xx for a brilliant job..."

"Xx called the Hub this afternoon to pass on her thanks and compliments to both the call taker and the tradesman who helped her today..."

"Tenant called regarding her replacement driveway.

She said that everyone at NFDC and our contractors had all 'gone above and beyond' and 'gone out of their way to make everything easier' for her. She is absolutely delighted with the work and with the way she has been treated all along..."

"Thank you to kitchen fitter (contractor) I can never thank you enough for the care and respect they gave me whilst they carried out to work on my kitchen. They put my needs above the work. They have kept me informed and each and every day they have made sure I was safe .... They left the kitchen clear of trip hazards..."

"I would like to convey my grateful thanks to xx and his workforce for being so thorough, so kind and considerate to my needs.

xx went above and beyond ...he ensured his crew did the same.

Amazing workers and nothing was too much trouble."

"Tenant called to say how impressed he was with xx, who came out to him this morning".

"Just a big thank you for helping get the repairs on the house corrected, the work was carried very professionally and both times the staff were very polite and worked well"

"Tenant called to say that he reported his boiler not working yesterday. An operative was deployed within the hour, condemned his boiler and left him some heaters until the new boiler is fitted next week. So far he is delighted with the service".

"I had my yearly gas safety check- the engineer was xx, he was efficient, clean and very professional. Please pass on my thanks to him"

"Tenant called to say how polite and helpful xx (Electrician) was who attended "

"Good afternoon, I had one of your workers at my property today to carry out work on my banister and spindles. I would just like to say what a credit he is to your team! His name was xx, and he was a carpenter by trade. He has done a wonderful job replacing the spindles and banister, he was punctual, well-mannered and all round a very pleasant and nice guy! His attention to detail was superb, he was polite and he cleared up after himself. I would just like to say a sincere thankyou to Jim for all his hard work today, it is greatly appreciated, and I hope he is recognised for his hard work!"

"Dear Sir/Madam, sending in a positive feedback for the most excellent service received with your electrician xx who called to do a full electricity inspection. xx was polite and courteous all the way through whilst carrying out his work in a professional manner. A delight to be in his company"

"Tenant wanted to give praise for xx as she said he did a wonderful job"

"Call to hub from tenant to say how pleased she is with her new kitchen and both the NFDC staff and contractors "

"Tenant called to say how please she was with the electrician who attended today to repair her smoke alarm"



## Landlord: Resident Services

"xx, again I must reiterate that every day I go and visit Mum and every time she is in her kitchen and singing your praises! The kitchen refit has made such a massive difference to her, not only physically, but mentally as well!"

"Two residents at xx would like to offer feedback on xx, the regular cleaner. 'she's great, she does a fantastic job' they were very pleased with the regular cleaning that she does!"

"I've just had a chat with xx and she wanted me to convey her thanks to all the team who helped xx and those who have given their assistance to her over the last week.

xx said that it's been a great help to her and her children knowing xx was in great hands, and that he was very optimistic about the move on accommodation he'd been allocated.!"

"Hi xx, thank you for your time yesterday and the smooth and caring sign-up process."

"Mum of tenant, passes thanks through to xx for all her help..."

"Tenant wanted to pass on how lovely, helpful, and efficient everyone has been in dealing with all her recent issues and what an amazing and efficient service we provide. She is very happy."

"I would also like to thank you for your help and support at a very difficult time. "

"I would like to say thank you. The property on xx road is beautiful, it's everything I hoped for it really is. I have accepted the flat and we sign the tenancy agreement tomorrow! I am very delighted to be able to relax and not have to worry all of the time. You have helped me in many ways, you have listened to me and have taken my situation into consideration and you did all you could to give me an amazing place to live with all of the beautiful surroundings. I am excited to move into the property."

## Housing Options and Tenancy Accounts

"xx, I have to say a huge thank you to you for your help, advice, and reassurance during this nightmarish time...Thank you again,"

"Thank you, xx, you've been amazing at helping me"

"Thank you, xx, I really appreciate all that you're doing and helping us so much."

"Just want to say thank you for everything you have done for me and my children.  
It's much appreciated, thank you."

"xx, I Just like to say how jolly efficient and kind you have been. Well done and thank you..."

"xx, Thanks for your email, it has been a pleasure having a great contact in the New Forest."

"Tenant ...wanted to thank everybody involved with assisting her mum to be re-housed, she said she cannot believe the difference it has made to xx and how happy she now is...She asked for special thanks to xx as you showed her around ... she is now in a secure, safe place she loves,"

"Tenants both said how great and supportive you both have been, and they are very grateful for all your help.."

"Thank you, xx,... you have been a godsend in a really difficult time for me.."

"Thank you to xx-So great news!!!! ...Thanks a million!!!!I wanted to say a huge thank you again for your help and participation!!! This is incredibly good news; we are very happy!..."

"Thank you so much for all your help. I am so grateful. The future is bright ..."

"Our dear and beloved xx and xx, thank you very much for the good organisation and participation in today's event. Thank you for accepting us and helping us"

" Me and my wife really grateful to you for your help! Without your assistance we can't proceed, previously we tried but unsuccessfully :( Thanks a million, to You!"

"Thank you for sending me this amazing piece of news!...Its taken a massive weight from my shoulders and I should be able to finally get a good nights sleep tonight. Thank you so much for your help and advice."

"Thank you for your help with this application. In an age of social media and ever-increasing technology it is great to speak to someone who can and does help!"

"I really wanted to express my appreciation and thanks to the absolutely wonderful staff from the nfcd that have made such a difference along the way, xx from the allocation team has been not only incredibly helpful but empathetic and kind, she listened and really cared about my xx, her quick reactions and competence really did start this whole process..."

"Just to say thank you again. You got me through it. The legal battle is not over. My health is improving. You helped with this phone. Got my car back and found my banking"

"I spoke with a client today who shared with me her experience with you during an out of hours call last week. Being on the out of hours rota can be challenging and of course it inevitably interrupts your home life. However, despite this, you continued to show the utmost professionalism and empathy towards a client in crisis. She was so very grateful for this and explained how your kindness really helped her during a time of dire need"

"Thank you for your email, I also just want to take the time to say thank you to you for everything you have done for me and the children you have been very supportive since day one"

"Just to say a massive thank you for all your help I really do appreciate it."

"It's been a bumpy ride for me, but am very great full for the help NFDC has given me. Just wanted to say a big thank you to all the team that has helped me and am taking 1 day at a time!"

"Mum moved into her apartment at xx on Monday. Finally, after 16 months of not having a place of her own, including being made homeless in June, she has somewhere to call home. She is surrounded by her own, familiar possessions ... xx is absolutely the right environment for her."

"I wanted to write and thank New Forest District Council, Hampshire County Council, and in particular yourselves, for the level of concern, care, and commitment you have shown to my mother, as well as to myself and my family. When I first approached New Forest District Council in July of last year, out of desperation, I really couldn't see a way forward and out of the situation we were in. xx, you reassured us and set us on the right path. xx, you and xx made the move to Extra Care accommodation possible. Over the last six months, I have also spoken with other, very helpful individuals, including those in the housing benefit team.

I am sure Councils and their staff, tend to receive more negative than positive feedback, but on this occasion, I cannot speak highly enough of everyone and your efforts to assist us... So I leave you my best wishes and heartfelt thanks."

"I just wanted to take a moment to express my sincere gratitude to xx as I was truly impressed and very thankful for all his help and as I imagined he would be unable to accept a thank you gift I thought the next best thing would be an email to his bosses to acknowledge his efforts. xx is settling in to his accommodation and is also very very thankful for xx help. He is looking forward to getting his life back on track. Thank you all for the work you do it is very much appreciated".

"I genuinely cannot thank you enough for all your help, after all the stress and plenty of tears there is finally light at the end of the tunnel"

"I just wanted to write to say a huge thank you for all you have both done in getting me into Number xx. The past 6 months have been so challenging, and I honestly felt like there was nothing left that could go wrong, but at last with the amazing kind help of both of you I can finally see some light at the end of the tunnel.

Thank you again to both of you as I cannot wait to move in and I know I will be so happy there".

"Thank you for everything over the last few months and a massive thank you for helping me secure this accommodation"

"I genuinely cannot thank you enough for all your help, after all the stress and plenty of tears there is finally light at the end of the tunnel"

## Community safety and support

"Hi just really wanted to say thank you again .... Thank you for today don't think you realise the difference you've just made!"

"I just wanted to say thank you for all your help, support and guidance over the past couple of years – I've loved working with you. The range of issues you deal with is immense and how you keep on top of it all is beyond me. There have been some real challenges as I'm sure there will continue to be – but I think some of the relationships and working arrangements we've put in place will only serve to make the partnership (and therefore the New Forest) stronger and safer.

Thanks again for everything"

## Environmental and Regulation

"Thank you and a quick note to say how good an experience it has been to work with you and the team on the ground. Lots of useful advice by everyone, respectful and very customer friendly. You and the team are a shining light not just to the council, but business in general on how to engage with the general public..."

"Thank you very much for this information and making sure we are all kept safe."

"THANKYOU , you are still my favourite Licensing authority !!"

"Many thanks for your email. I think you should know that you are by far the easiest and most efficient Licensing team to deal with! Many thanks"

" ...I just wanted to say again thanks to you and all concerned in Licensing ... every time I've communicated with NFDC you've all been super polite and helpful"

"I have had excellent service from licensing department over the past 13 years and thank you for the friendly and efficient way I have been looked after."

"Thank you for your most kind letter of xx, which is much appreciated. "

"Just a quick email to pass on customer feedback. xx spoke to a lady today, regarding a complex pest issue in a shared ownership property.

The customer advised me, that the lovely lady xx she had spoken to, had been very helpful and could I pass on her thanks".

## Revenues and Benefits

"...I was met with another member of your staff, xx who again was patient, kind and incredibly efficient."

"... I just wanted to say again, thank you so much for keeping an eye on things with me and for the increased support..."

I am grateful for good people like yourself working in and around this process and your support is so very much appreciated

Thank you, not just for me, but for my children, whose well being your are also assisting."

"...Many thanks for arranging this for me. The staff at Lymington made the whole process very easy please pass my thanks".

"Just to say thank you very much for the continuing financial support and clarifications - I am so very grateful for this and appreciate your kind considerations in these challenging times... "

## Coastal

"Please pass on my personal thanks to the NFDC team who provided so much information ... all the best to you and thanks again...."

"We are also very grateful for the coastal team - you have always given very prompt and thorough responses whenever we contacted you during our beach hut search"

"Thank you for the team effort in clearing the shingle at Milford"

"Thank you for the hard work all of the team, it looks great".

"Some of the hut owners have commented on how much they appreciate the personal touch of taking the time to call rather than sending out bulk emails of just sending letters. One lady said it really makes a difference. "

"I just wanted to say thank you very much on behalf of a lot of us that you see beach at Hordle Cliff for organizing for the smashed glass door that was on the beach at the bottom of the steps by the Kiosk Cafe to be removed. We really appreciate that. Obviously a lot of dog walkers and general public use that for swimming etcetera and we really appreciate the fact that glass was taken away. So thank you for responding to that. Many thanks".

"We are all very grateful for your excellent work in getting this done".

## Waste and Transport

"Thank you very much for your kind reply. The operatives work hard and at a pace. The new bins should solve it all.  
I [would] like to say a huge thank you for resolving the issue of the domestic waste... Long may it continue"

"Many thanks to the team ... They were really friendly and did a really great job, an asset to the council..."

"I have just had a visit from xx and write to state my gratitude for the swift and timely manner he dealt with my complaint."

"We wanted to write to extend our gratitude to the refuse collectors...Our 2 year old boy, xx, eagerly awaits the bin collection every xx morning and loves to go out and watch the team collect our bins. They are always incredibly friendly with him and take the time to stop, wave and chat and let him see what they're doing. .... Please ensure [our] appreciation is shared with them and their line managers."

## Grounds, Streetscene and Open Spaces

"Just wanted to say what a brilliant job is being done ...Thank you very much for what you are doing!!"

"I logged a call this morning, ...The response I got today was Excellent , you responded to my call, with a prompt E-mail informing me of the process... Thank You very much for such excellent service"

## 12.Next steps for 2025/26 and beyond

- 12.1 During 2024/25 the number of complaints received increased. It is vital that complaints are responded to adequately and in a timely manner and that our corporate complaints procedure works effectively for both complainants and staff.
- 12.2 Complaints serve as one of the Council's most important intelligence sources. It is important that services scrutinise complaints to learn from them and develop meaningful service improvements.
- 12.3 We have already made some positive changes to our complaints handling processes and plan several actions for 2025/26 and beyond to improve our complaints handling. These are set out in this report.

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## NEW FOREST DISTRICT COUNCIL

## HOUSING OMBUDSMAN COMPLAINT HANDLING CODE SELF ASSESSMENT – MAY 2025

## Section 1: Definition of a complaint

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
1.2	A complaint must be defined as: <i>'an expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the landlord, its own staff, or those acting on its behalf, affecting a resident or group of residents.'</i>	Yes	The Council's <a href="#">Corporate Complaints Procedure</a> , at section 3.1 includes the following definition:  A corporate complaint is 'an expression of dissatisfaction, however made, about the standard of service, actions or lack of action by the Council, its own staff, or those acting on its behalf, affecting a resident or group of residents'.	
1.3	A resident does not have to use the word 'complaint' for it to be treated as such. Whenever a resident expresses dissatisfaction landlords must give them the choice to make complaint. A complaint that is submitted via a third party or representative must be handled in line with the landlord's complaints policy.	Yes	The <a href="#">Corporate Complaints Procedure</a> , at section 3.1 states:  'Where the above definition is met, the matter will be dealt with as a corporate complaint, even if the complainant does not refer to the matter themselves as a 'complaint'  The Council does allow complaints submitted by a third party. However, appropriate authority is sought where	

			<p>a third party or representative submits a complaint on someone's behalf. (section 5.2 of the <a href="#">Corporate Complaints Procedure</a>):</p> <p>'A corporate complaint may also be submitted on behalf of a complainant by a third party such as a family member or representative. However, the Council will seek confirmation from the complainant directly that this third party has authority to act on their behalf and have personal information disclosed to them'.</p>	
1.4	Landlords must recognise the difference between a service request and a complaint. This must be set out in their complaints policy. A service request is a request from a resident to the landlord requiring action to be taken to put something right. Service requests are not complaints, but must be recorded, monitored and reviewed regularly.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 4 includes 'what is not a corporate complaint'.</p> <p>This includes reference to service requests as follows:</p> <ul style="list-style-type: none"> <li>• 'Service requests where an individual is requiring the Council to take action to put something right.</li> <li>o Such service requests will be recorded, monitored and reviewed regularly.</li> <li>o Where an individual expresses dissatisfaction with the response to their service request, a complaint will be raised. Efforts to address the</li> </ul>	

			service request will continue'.	
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1.5	A complaint must be raised when the resident expresses dissatisfaction with the response to their service request, even if the handling of the service request remains ongoing. Landlords must not stop their efforts to address the service request if the resident complains.	Yes	See 1.4 above.	
1.6	An expression of dissatisfaction with services made through a survey is not defined as a complaint, though wherever possible, the person completing the survey should be made aware of how they can pursue a complaint if they wish to. Where landlords ask for wider feedback about their services, they also must provide details of how residents can complain.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 4 includes 'what is not a corporate complaint'.</p> <p>This includes the following:</p> <ul style="list-style-type: none"> <li>• An expression of dissatisfaction with services made through a survey or in response to a request for feedback.</li> </ul> <p>o However, individuals will be given details of how to complain should they wish to.</p>	

## Section 2: Exclusions

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
2.1	Landlords must accept a complaint unless there is a valid reason not to do so. If landlords decide not to accept a complaint they must be able to evidence their reasoning. Each complaint must be considered on its own merits	Yes	<p>All complaints are accepted, subject to limited exceptions as set out in section 4 of the <a href="#">Corporate Complaints Procedure</a>, 'what is not a corporate complaint'.</p> <p>Section 4.3 states:</p> <p>'Where the Council decides that a complaint cannot be dealt with as a corporate complaint in accordance with this Procedure, we will write to the complainant explaining the reasons for this and advising them of their right to take that decision to the relevant Ombudsman. Each complaint will be considered on its own merits. Please see section 11 below.'</p> <p>Section 11 of the procedure includes information regarding contacting the Ombudsman.</p>	

2.2	<p>A complaints policy must set out the circumstances in which a matter will not be considered as a complaint or escalated, and these circumstances must be fair and reasonable to residents. Acceptable exclusions include:</p> <ul style="list-style-type: none"> <li>• The issue giving rise to the complaint occurred over twelve months ago.</li> <li>• Legal proceedings have started. This is defined as details of the claim, such as the Claim Form and Particulars of Claim, having been filed at court.</li> <li>• Matters that have previously been considered under the complaints policy.</li> </ul>	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 4 includes 'what is not a corporate complaint'.</p> <p>These include: service requests, complaints against a councilor, anonymous complaints, cases where the council or the complainant has started legal proceedings, complaints which have already exhausted the procedure.</p>	
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2.3	Landlords must accept complaints referred to them within 12 months of the issue occurring or the resident becoming aware of the issue, unless they are excluded on other grounds. Landlords must consider whether to apply discretion to accept complaints made outside this time limit where there are good reasons to do so.	Yes	The <a href="#">Corporate Complaints Procedure</a> , at section 4 includes 'what is not a corporate complaint'. This includes the following:  'When the complaint is over 12 months old, and the complainant was aware of the issue but did not report it to the Council. However, exceptions may be made if there is a good reason for the delay'	
2.4	If a landlord decides not to accept a complaint, an explanation must be provided to the resident setting out the reasons why the matter is not suitable for the complaints process and the right to take that decision to the Ombudsman. If the Ombudsman does not agree that the exclusion has been fairly applied, the Ombudsman may tell the landlord to take on the complaint.	Yes	See 2.1 above.	
2.5	Landlords must not take a blanket approach to excluding complaints; they must consider the individual circumstances of each complaint.	Yes	See 2.1 above.	

### Section 3: Accessibility and Awareness

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
3.1	Landlords must make it easy for residents to complain by providing different channels through which they can make a complaint. Landlords must consider their duties under the Equality Act 2010 and anticipate the needs and reasonable adjustments of residents who may need to access the complaints process.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 6, states that complainants can contact the Council in a number of ways, including by email, via the website, by telephone, by post, through social media or in person.</p> <p>The <a href="#">Corporate Complaints Procedure</a>, at section 7 explains what help can be provided to use the procedure.</p> <p>The Council, as a public authority, will make reasonable adjustments where required to do so. All staff receive equalities training.</p>	
3.2	Residents must be able to raise their complaints in any way and with any member of staff. All staff must be aware of the complaints process and be able to pass details of the complaint to the appropriate person within the landlord.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 6, states that complainants can contact the Council in a number of ways, including by email, via the website, by telephone, by post, through social media or in person.</p> <p>Staff awareness is raised periodically through corporate communications and cascading through the Council's Leadership Team.</p>	<p>We are developing training for all staff on complaint handling, recognising complaints, the difference between service requests and complaints and the importance of learning from complaints.</p> <p>We will provide service specific training for services most likely to receive or deal with complaints, including Housing Services and Customer Services.</p>



3.3	High volumes of complaints must not be seen as a negative, as they can be indicative of a well-publicised and accessible complaints process. Low complaint volumes are potentially a sign that residents are unable to complain.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 1.1 sets out our aim when it comes to complaints:</p> <p>'New Forest District Council ('the Council') is committed to providing residents, tenants and customers with quality services. However, sometimes things do go wrong. The Council encourages complainants to tell us when this happens so we can put things right, explain what has happened, learn from our mistakes and improve our services.'</p>	
3.4	Landlords must make their complaint policy available in a clear and accessible format for all residents. This will detail the two stage process, what will happen at each stage, and the timeframes for responding. The policy must also be published on the landlord's website.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> is available on the Council's website under the Feedback, comments and complaints page.</p> <p>It is also published in an accessible format.</p> <p>Section 9 sets out the two-stage process.</p>	

3.5	The policy must explain how the landlord will publicise details of the complaints policy, including information about the Ombudsman and this Code.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 1.4 states:</p> <p>'This Procedure will be published on the Council's website and hard copies will be made available on request'.</p> <p>Section 1.5 states:</p> <p>'This Procedure has been prepared in accordance with the <a href="#">Local Government and Social Care Ombudsman's Complaint Handling Code</a> and the <a href="#">Housing Ombudsman's Complaint Handling Code</a>'.</p> <p>The <a href="#">Corporate Complaints Procedure</a> at section 11 includes information about contacting the Ombudsman.</p>	
3.6	Landlords must give residents the opportunity to have a representative deal with their complaint on their behalf, and to be represented or accompanied at any meeting with the landlord.	Yes	The Council does allow complaints submitted by a third party or for a third-party representative to act on a complainant's behalf. However, appropriate authority is sought where a third party or representative submits a complaint on someone's behalf. See section 5.2 of the <a href="#">Corporate Complaints Procedure</a> .	

3.7	Landlords must provide residents with information on their right to access the Ombudsman service and how the individual can engage with the Ombudsman about their complaint.	Yes	<p>The Council currently advises complainants in the acknowledgement of their corporate complaint, in the stage 1 response and in the stage 2 response that they can escalate their complaint to the Ombudsman when they have exhausted the procedure.</p> <p>See sections 9.4 and 9.6 of the <a href="#">Corporate Complaints Procedure</a>.</p>	
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## Section 4: Complaint Handling Staff

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
4.1	Landlords must have a person or team assigned to take responsibility for complaint handling, including liaison with the Ombudsman and ensuring complaints are reported to the governing body (or equivalent). This Code will refer to that person or team as the 'complaints officer'. This role may be in addition to other duties.	Yes	The Information Governance and Complaints Team has responsibility for complaint handling.	
4.2	The complaints officer must have access to staff at all levels to facilitate the prompt resolution of complaints. They must also have the authority and autonomy to act to resolve disputes promptly and fairly.	Yes	<p>The Information Governance and Complaints Team facilitates the handling of complaints.</p> <p>Stage 1 complaints are dealt with by senior experienced managers and Stage 2 complaints are dealt with by the Council's Monitoring Officer. All of whom have authority and autonomy to resolve complaints.</p> <p>See section 9.6 and 10 of the <a href="#">Corporate Complaints Procedure</a>.</p>	

4.3	Landlords are expected to prioritise complaint handling and a culture of learning from complaints. All relevant staff must be suitably trained in the importance of complaint handling. It is important that complaints are seen as a core service and must be resourced to handle complaints effectively.	Yes	<p>The Council has a culture of learning from complaints.</p> <p>The <a href="#">Corporate Complaints Procedure</a> at section 1.1 sets out our aim when it comes to complaints:</p> <p>'New Forest District Council ('the Council') is committed to providing residents, tenants and customers with quality services. However, sometimes things do go wrong. The Council encourages complainants to tell us when this happens so we can put things right, explain what has happened, learn from our mistakes and improve our services.'</p> <p>Training is delivered to the Leadership Team on the importance of complaint handling and the importance of learning from complaints.</p>	We are developing training for all staff on complaint handling, recognising complaints, the difference between service requests and complaints and the importance of learning from complaints.
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## Section 5: The Complaint Handling Process

Code provision	Code requirement	Comply : Yes / No	Evidence	Commentary / explanation
5.1	Landlords must have a single policy in place for dealing with complaints covered by this Code. Residents must not be treated differently if they complain.	Yes	All complaints are dealt with in accordance with the <a href="#">Corporate Complaints Procedure</a> .	
5.2	The early and local resolution of issues between landlords and residents is key to effective complaint handling. It is not appropriate to have extra named stages (such as 'stage 0' or 'informal complaint') as this causes unnecessary confusion.	Yes	The <a href="#">Corporate Complaints Procedure</a> includes a two-stage process which is set out at section 9.	
5.3	A process with more than two stages is not acceptable under any circumstances as this will make the complaint process unduly long and delay access to the Ombudsman.	Yes	See 5.2 above.	
5.4	Where a landlord's complaint response is handled by a third party (e.g. a contractor or independent adjudicator) at any stage, it must form part of the two stage complaints process set out in this Code. Residents must not be	Yes	The Council does not refer complaints to external contractors.	

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	expected to go through two complaints processes.			
5.5	Landlords are responsible for ensuring that any third parties handle complaints in line with the Code.	Yes	The Council does not refer complaints to external contractors.	
5.6	When a complaint is logged at Stage 1 or escalated to Stage 2, landlords must set out their understanding of the complaint and the outcomes the resident is seeking. The Code will refer to this as “the complaint definition”. If any aspect of the complaint is unclear, the resident must be asked for clarification.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> at section 9.6 includes the following:</p> <p>‘Complaint acknowledged within 5 working days by the Information Governance and Complaints Team. This acknowledgement will set out our understanding of the complaint and the outcome the complainant is seeking. Complainant informed of officer dealing with complaint and expected response date.’</p> <p>If any part of the complaint or the outcome that is being sought is not clear, we include the following in the acknowledgement:</p> <p>‘Please can you confirm by return email what outcome you are seeking to resolve your complaint’.</p> <p>‘If you disagree with the way I have summarised your complaint, please let me know as soon as possible’.</p>	

5.7	When a complaint is acknowledged at either stage, landlords must be clear which aspects of the complaint they are, and are not, responsible for and clarify any areas where this is not clear.	Yes	Our acknowledgement template includes the following if applicable:  '[You also refer to xxxxxxxxx. Please note the Council is not responsible for this element of your complaint. This should be raised with xxxxxxxxx]'	
5.8	At each stage of the complaints process, complaint handlers must: <ul style="list-style-type: none"> <li>a. deal with complaints on their merits, act independently, and have an open mind;</li> <li>b. give the resident a fair chance to set out their position;</li> <li>c. take measures to address any actual or perceived conflict of interest; and</li> <li>d. consider all relevant information and evidence carefully.</li> </ul>	Yes	All complaints are dealt with by experienced managers.  Training is delivered to the Leadership Team on the importance of complaint handling and the requirements of 5.8 of the code.	



5.9	Where a response to a complaint will fall outside the timescales set out in this Code, the landlord must agree with the resident suitable intervals for keeping them informed about their complaint.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> at section 9.5 includes the following:</p> <p>‘Every effort will be made to resolve complaints without undue delay. The Council will aim to meet the timescales set out in this Procedure. However, if an unavoidable delay occurs, we will notify the complainant with the reason and provide a revised due date for response. We will aim for any extension to be no more than 10 working days for stage 1 complaints and 20 working days for stage 2 complaints. We will keep the complainant informed including, where appropriate, how often updates will be provided’.</p>	
5.10	Landlords must make reasonable adjustments for residents where appropriate under the Equality Act 2010. Landlords must keep a record of any reasonable adjustments agreed, as well as a record of any disabilities a resident has disclosed. Any agreed reasonable adjustments must be kept under active review.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 7 explains what help can be provided to use the procedure.</p> <p>The Council, as a public authority, will make reasonable adjustments where required to do so. All staff receive equalities training.</p> <p>Section 7.5 states:</p> <p>‘Where a complainant requires reasonable adjustments to be made to enable them to use this Procedure in accordance with the Equality Act</p>	This Council is in the process of approving a Reasonable Adjustments Policy for Customers.

			2010 we will make these and keep them under review'	
5.11	Landlords must not refuse to escalate a complaint through all stages of the complaints procedure unless it has valid reasons to do so. Landlords must clearly set out these reasons, and they must comply with the provisions set out in section 2 of this Code.	Yes	<p>Complaints will go through both stages of the <a href="#">Corporate Complaints Procedure</a>, unless they are not considered as a corporate complaint in accordance with section 4, or where it is appropriate for them to be escalated to the final stage in accordance with section 9.3:</p> <p>'Where it is appropriate, taking into consideration the circumstances of a particular complaint, the Monitoring Officer or the Chief Executive may use their discretion to personally deal with that complaint at stage 2 of this Procedure even if the earlier stage has not been completed. The reasons for this will be explained to the complainant.'</p> <p>In accordance with section 12 which deals with 'management of unreasonable complainant behaviour', one of the restrictions that may be imposed on an individual classified as an unreasonable complainant states:</p> <p>'In exceptional circumstances, where an investigation into a complaint is ongoing, (and the complainant's behaviour is such to warrant it) the investigation may cease, and the complainant be referred to the</p>	

			relevant Ombudsman. This will include a breakdown in the relationship between the Council and the complainant where it is considered there may be nothing to gain from following through both stages of this Procedure'.	
5.12	A full record must be kept of the complaint, and the outcomes at each stage. This must include the original complaint, and the date received, all correspondence with the resident, correspondence with other parties, and	Yes	The Information Governance and Complaints Team keep a full record of all complaints.	

	any relevant supporting documentation such as reports or surveys.			
5.13	Landlords must have processes in place to ensure a complaint can be remedied at any stage of its complaints process. Landlords must ensure appropriate remedies can be provided at any stage of the complaints process without the need for escalation.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 1.1 sets out our aim when it comes to complaints:</p> <p>'New Forest District Council ('the Council') is committed to providing residents, tenants and customers with quality services. However, sometimes things do go wrong. The Council encourages complainants to tell us when this happens so we can put things right, explain what has happened, learn from our mistakes and improve our services.'</p> <p>Section 10 sets out requirements for the outcome of complaints. Remedies can be offered at any stage.</p>	
5.14	Landlords must have policies and procedures in place for managing unacceptable behaviour from residents and/or their representatives. Landlords must be able to evidence reasons for putting any restrictions in place and must keep restrictions under regular review.	Yes	The <a href="#">Corporate Complaints Procedure</a> , at section 12, sets out our policy for 'management of unreasonable complainant behaviour'.	

5.15	Any restrictions placed on contact due to unacceptable behaviour must be proportionate and demonstrate regard for the provisions of the Equality Act 2010.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a>, at section 12.12 and 12.13 states:</p> <p>12.12 We understand that some complainants may find it difficult for them to express themselves or communicate clearly, especially when they are anxious or upset. We ask that complainants explain what adjustments they're looking for and how this will ensure they can make a complaint to us in a reasonable way.</p> <p>12.13 However, this 'Management of Unreasonable Complainant Behaviour' section of this Procedure may still be applied if there are actions or behaviours which are having a negative effect on our staff or our work even where a reasonable adjustment has been made. Restrictions imposed will also be appropriate to a complainants' needs and reasonable adjustments can be made where required.'</p>	
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Section 6: Complaints Stages

Stage 1

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
6.1	Landlords must have processes in place to consider which complaints can be responded to as early as possible, and which require further investigation. Landlords must consider factors such as the complexity of the complaint and whether the resident is vulnerable or at risk. Most stage 1 complaints can be resolved promptly, and an explanation, apology or resolution provided to the resident.	Yes	See 5.13 above.	
6.2	Complaints must be acknowledged, defined and logged at stage 1 of the complaints procedure <b><u>within five working days of the complaint being received.</u></b>	Yes	The <a href="#">Corporate Complaints Procedure</a> at section 9.6 includes the following:  'Complaint acknowledged within 5 working days by the Information Governance and Complaints Team. This acknowledgement will set out our understanding of the complaint and the outcome the complainant is seeking. Complainant informed of officer dealing with complaint and expected response date.'	

6.3	Landlords must issue a full response to stage 1 complaints <b><u>within 10 working days</u></b> of the complaint being acknowledged.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> at section 9.6 includes the following:</p> <p>'Stage 1 response sent within 10 working days, following the acknowledgement, advising the complainant of the right to escalate the complaint by contacting the Information Governance and Complaints Team (complaints@nfdc.gov.uk). The response will also advise the complainant of their right to escalate their complaint to the relevant Ombudsman when they have exhausted this Procedure'</p>	
6.4	Landlords must decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform the resident of the expected timescale for response. Any extension must be no more than 10 working days without good reason, and the reason(s) must be clearly explained to the resident.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> at section 9.5 states:</p> <p>'Every effort will be made to resolve complaints without undue delay. The Council will aim to meet the timescales set out in this Procedure. However, if an unavoidable delay occurs, we will notify the complainant with the reason and provide a revised due date for response. We will aim for any extension to be no more than 10 working days for stage 1 complaints and 20 working days for stage 2 complaints. We will keep the complainant informed including, where appropriate, how often updates will be provided'</p>	

6.5	When an organisation informs a resident about an extension to these timescales, they must be provided with the contact details of the Ombudsman.	Yes	Our template extension of time wording includes details of how to contact the Ombudsman.	
6.6	A complaint response must be provided to the resident when the answer to the complaint is known, not when the outstanding actions required to address the issue are completed. Outstanding actions must still be tracked and actioned promptly with appropriate updates provided to the resident.	Yes	<p>A complaint response may include that further action will be completed. This is followed up by the relevant manager.</p> <p>Section 10 of the <a href="#">Corporate Complaints Procedure</a> includes that complaint responses will set out 'details of any outstanding actions'.</p> <p>Section 10.5 states:</p> <p>'Where a complainant has completed this Procedure but there are outstanding actions to address the issue complained about, these will be followed up and suitable updates will be provided to the complainant'</p>	
6.7	Landlords must address all points raised in the complaint definition and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate.	Yes	A template complaint response has been prepared for responders to follow to meet these requirements.	



6.8	Where residents raise additional complaints during the investigation, these must be incorporated into the stage 1 response if they are related and the stage 1 response has not been issued. Where the stage 1 response has been issued, the new issues are unrelated to the issues already being	Yes	This is how additional complaints are dealt with.	
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	investigated or it would unreasonably delay the response, the new issues must be logged as a new complaint.			
6.9	<p>Landlords must confirm the following in writing to the resident at the completion of stage 1 in clear, plain language:</p> <ol style="list-style-type: none"> <li>the complaint stage;</li> <li>the complaint definition;</li> <li>the decision on the complaint;</li> <li>the reasons for any decisions made;</li> <li>the details of any remedy offered to put things right;</li> <li>details of any outstanding actions; and</li> <li>details of how to escalate the matter to stage 2 if the individual is not satisfied with the response.</li> </ol>	Yes	<p>Section 10 of the <a href="#">Corporate Complaints Procedure</a> includes that complaint responses will set out:</p> <ul style="list-style-type: none"> <li>the complaint stage;</li> <li>the complaint definition;</li> <li>the decision on the complaint;</li> <li>the reasons for any decisions made;</li> <li>the details of any remedy offered to put things right;</li> <li>details of any outstanding actions; and</li> <li>details of how to escalate the matter if the complainant is not satisfied with the response.</li> </ul> <p>A template complaint response has been prepared for responders to follow to meet these requirements.</p> <p>Training is delivered to the Leadership Team on the importance complaint handling and the requirements of 6.9 of the code.</p>	

Stage 2

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
6.10	If all or part of the complaint is not resolved to the resident's satisfaction at stage 1, it must be progressed to stage 2 of the landlord's procedure. Stage 2 is the landlord's final response.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> at section 9.6 states:</p> <p>'Request to escalate complaint received.</p> <p>Escalation request acknowledged within 5 working days by the Information Governance and Complaints Team. This acknowledgement will set out our understanding of the complaint and the outcome the complainant is seeking. Complainant informed of officer dealing with complaint and expected response date.</p> <p>Stage 2 response sent within 20 working days, advising the complainant that they have completed this Procedure and they are entitled to refer their complaint to the Local Government and Social Care Ombudsman or, for Housing Complaints (by Council tenants/ leaseholders about the Council as their landlord), the Housing Ombudsman if they remain dissatisfied.'</p>	

6.11	Requests for stage 2 must be acknowledged, defined and logged at stage 2 of the complaints procedure within five working days of the escalation request being received.	Yes	See 6.10 above.	
6.12	Residents must not be required to explain their reasons for requesting a stage 2 consideration. Landlords are expected to make reasonable efforts to understand why a resident remains unhappy as part of its stage 2 response.	Yes	Complainants are not required to state their reasons for escalating their complaint.	
6.13	The person considering the complaint at stage 2 must not be the same person that considered the complaint at stage 1.	Yes	The <a href="#">Corporate Complaints Procedure</a> at section 9.6 sets out the responsible Officers for dealing with complaints. Stage 2 will also be dealt with by the independent Monitoring Officer on behalf of the Chief Executive.	
6.14	Landlords must issue a final response to the stage 2 <b><u>within 20 working days</u></b> of the complaint being acknowledged.	Yes	The <a href="#">Corporate Complaints Procedure</a> at section 9.6 includes the following:  'Stage 2 response sent within 20 working days, following the acknowledgement, advising the complainant that they have completed this Procedure and they are entitled to refer their complaint to the Local Government and Social Care Ombudsman or, for Housing Complaints (by Council tenants/ leaseholders about the Council as their landlord), the Housing Ombudsman if they remain	

			dissatisfied.'	
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6.15	Landlords must decide whether an extension to this timescale is needed when considering the complexity of the complaint and then inform the resident of the expected timescale for response. Any extension must be no more than 20 working days without good reason, and the reason(s) must be clearly explained to the resident.	Yes	The <a href="#">Corporate Complaints Procedure</a> at section 9.5 states:  ‘Every effort will be made to resolve complaints without undue delay. The Council will aim to meet the timescales set out in this Procedure. However, if an unavoidable delay occurs, we will notify the complainant with the reason and provide a revised due date for response. We will aim for any extension to be no more than 10 working days for stage 1 complaints and 20 working days for stage 2 complaints. We will keep the complainant informed including, where appropriate, how often updates will be provided’	
6.16	When an organisation informs a resident about an extension to these timescales, they must be provided with the contact details of the Ombudsman.	Yes	Our template extension of time wording includes details of how to contact the Ombudsman.	
6.17	A complaint response must be provided to the resident when the answer to the complaint is known, not when the outstanding actions required to address the issue are completed. Outstanding actions must still be tracked and actioned promptly with appropriate updates provided to the resident.	Yes	A complaint response may include that further action will be completed. This is followed up by the relevant manager.  Section 10 of the <a href="#">Corporate Complaints Procedure</a> includes that complaint responses will set out ‘details of any outstanding actions’.  Section 10.5 states:	

			'Where a complainant has completed this Procedure but there are outstanding actions to address the issue complained about, these will be followed up and suitable updates will be provided to the complainant'	
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6.18	Landlords must address all points raised in the complaint definition and provide clear reasons for any decisions, referencing the relevant policy, law and good practice where appropriate.	Yes	A template complaint response has been prepared for responders to follow to meet these requirements.	
6.19	Landlords must confirm the following in writing to the resident at the completion of stage 2 in clear, plain language: <ul style="list-style-type: none"> <li>a. the complaint stage;</li> <li>b. the complaint definition;</li> <li>c. the decision on the complaint;</li> <li>d. the reasons for any decisions made;</li> <li>e. the details of any remedy offered to put things right;</li> <li>f. details of any outstanding actions; and</li> <li>g. details of how to escalate the matter to the Ombudsman Service if the individual remains dissatisfied.</li> </ul>	Yes	<p>Section 10 of the <a href="#">Corporate Complaints Procedure</a> includes that complaint responses will set out:</p> <ul style="list-style-type: none"> <li>• the complaint stage;</li> <li>• the complaint definition;</li> <li>• the decision on the complaint;</li> <li>• the reasons for any decisions made;</li> <li>• the details of any remedy offered to put things right;</li> <li>• details of any outstanding actions; and</li> <li>• details of how to escalate the matter if the complainant is not satisfied with the response.</li> </ul> <p>A template complaint response has been prepared for responders to follow to meet these requirements.</p> <p>Training is delivered to the Leadership Team on the importance complaint handling and the requirements of 6.19 of the code. The Monitoring Officer is part of the Leadership Team.</p>	



6.20	Stage 2 is the landlord's final response and must involve all suitable staff members needed to issue such a response.	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> at section 9.2 states:</p> <p>'The final, stage 2, response is dealt with by the Council's Monitoring Officer on behalf of the Chief Executive. At this stage, the Monitoring Officer ensures that the Chief Executive is aware of the complaint and the response to it.'</p>	
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## Section 7: Putting things right

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
7.1	<p>Where something has gone wrong a landlord must acknowledge this and set out the actions it has already taken, or intends to take, to put things right. These can include:</p> <ul style="list-style-type: none"> <li>• Apologising;</li> <li>• Acknowledging where things have gone wrong;</li> <li>• Providing an explanation, assistance or reasons;</li> <li>• Taking action if there has been delay;</li> <li>• Reconsidering or changing a decision;</li> <li>• Amending a record or adding a correction or addendum;</li> <li>• Providing a financial remedy;</li> <li>• Changing policies, procedures or practices.</li> </ul>	Yes	<p>The <a href="#">Corporate Complaints Procedure</a> at section 10 includes:</p> <p>10.2 The complaint response will advise complainants if their complaint is:</p> <ul style="list-style-type: none"> <li>• Upheld</li> <li>• Partially upheld or</li> <li>• Not upheld.</li> </ul> <p>10.3 If a complaint has been Upheld or Partially Upheld steps will be taken to try and resolve the complaint. This may include as appropriate to the circumstances:</p> <ul style="list-style-type: none"> <li>• acknowledging that things have gone wrong, apologising and explaining why</li> <li>• taking action where there has been a delay</li> <li>• changing a decision</li> <li>• reviewing a policy or procedure</li> <li>• making a goodwill or time and trouble payment</li> <li>• providing compensation for a loss'</li> </ul>	
7.2	Any remedy offered must reflect the impact on the resident as a result of any fault identified.	Yes	The <a href="#">Corporate Complaints Procedure</a> at section 10, sets out that both the Local Government and Social Care	

			Ombudsman and the Housing Ombudsman guidance on remedies will be considered.	
7.3	The remedy offer must clearly set out what will happen and by when, in agreement with the resident where appropriate. Any remedy proposed must be followed through to completion.	Yes	The Council meets this requirement.  Section 10.5 states that:  'Where a complainant has completed this Procedure but there are outstanding actions to address the issue complained about, these will be followed up and suitable updates will be provided to the complainant'	
7.4	Landlords must take account of the guidance issued by the Ombudsman when deciding on appropriate remedies.		The <a href="#">Corporate Complaints Procedure</a> at section 10, sets out that both the Local Government and Social Care Ombudsman and the Housing Ombudsman guidance on remedies will be considered.	

## Section 8: Putting things right

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
8.1	<p>Landlords must produce an annual complaints performance and service improvement report for scrutiny and challenge, which must include:</p> <ul style="list-style-type: none"> <li>a. the annual self-assessment against this Code to ensure their complaint handling policy remains in line with its requirements.</li> <li>b. a qualitative and quantitative analysis of the landlord's complaint handling performance. This must also include a summary of the types of complaints the landlord has refused to accept;</li> <li>c. any findings of non-compliance with this Code by the Ombudsman;</li> <li>d. the service improvements made as a result of the learning from complaints;</li> <li>e. any annual report about the landlord's performance from the Ombudsman; and</li> <li>f. any other relevant reports or publications produced by the Ombudsman in relation to the work of the landlord.</li> </ul>	Yes	<p>The Council produces an annual complaints performance and service improvement report to include all required information.</p> <p>The Council also produces a half yearly update report mid-year.</p>	

8.2	The annual complaints performance and service improvement report must be reported to the landlord's governing body (or equivalent) and published on the on the section of its website relating to complaints. The governing body's response to the report must be published alongside this.	Yes	The annual complaints performance and service improvement report is reported to Cabinet and published, alongside Cabinet's response, online here:  <a href="#">Feedback, comments and complaints - New Forest District Council</a>	
8.3	Landlords must also carry out a self-assessment following a significant restructure, merger and/or change in procedures.	Yes	This will be actioned as appropriate.	
8.4	Landlords may be asked to review and update the self-assessment following an Ombudsman investigation.	Yes	This will be actioned as applicable.	
8.5	If a landlord is unable to comply with the Code due to exceptional circumstances, such as a cyber incident, they must inform the Ombudsman, provide information to residents who may be affected, and publish this on their website Landlords must provide a timescale for returning to compliance with the Code.	Yes	This will be actioned as applicable.	

## Section 9: Scrutiny & oversight: continuous learning and improvement

Code provision	Code requirement	Comply: Yes / No	Evidence	Commentary / explanation
9.1	Landlords must look beyond the circumstances of the individual complaint and consider whether service improvements can be made as a result of any learning from the complaint.	Yes	Learning from complaints is captured and procedural changes logged and followed up.	
9.2	A positive complaint handling culture is integral to the effectiveness with which landlords resolve disputes. Landlords must use complaints as a source of intelligence to identify issues and introduce positive changes in service delivery.	Yes	<p>The Council has a culture of learning from complaints.</p> <p>The <a href="#">Corporate Complaints Procedure</a>, at section 1.1 sets out our aim when it comes to complaints:</p> <p>'New Forest District Council ('the Council') is committed to providing residents, tenants and customers with quality services. However, sometimes things do go wrong. The Council encourages complainants to tell us when this happens so we can put things right, explain what has happened, learn from our mistakes and improve our services.'</p> <p>Training is delivered to the Leadership Team on the importance complaint handling and the importance of learning from complaints.</p> <p>Quarterly meetings are held with</p>	

			senior managers to consider complaint trends, complaints decided, learning identified and service improvements.	
9.3	Accountability and transparency are also integral to a positive complaint handling culture. Landlords must report back on wider learning and improvements from complaints to stakeholders, such as residents' panels, staff and relevant committees.	Yes	<p>Complaint handling will be reported to:</p> <ul style="list-style-type: none"> <li>• Cabinet.</li> <li>• Executive Management Team.</li> <li>• Overview and Scrutiny Panels</li> <li>• Leadership Team</li> </ul> <p>The Council's Tenants Involvement Group will also receive reports on complaint handling. The Council has also introduced a Tenant Complaints Forum to review complaints.</p>	
9.4	Landlords must appoint a suitably senior lead person as accountable for their complaint handling. This person must assess any themes or trends to identify potential systemic issues, serious risks, or policies and procedures that require revision.	Yes	The Information Governance and Complaints Manager has this role. They are part of the Leadership Team and report to the Monitoring Officer.	

9.5	In addition to this a member of the governing body (or equivalent) must be appointed to have lead responsibility for complaints to support a positive complaint handling culture. This person is referred to as the Member Responsible for Complaints ('the MRC').	Yes	As the Council is a local authority, also under the jurisdiction of the Local Government and Social Care Ombudsman, we have two MRCs who are part of Cabinet: <ul style="list-style-type: none"> <li>• Housing and Homelessness Portfolio Holder – Housing complaints</li> <li>• Planning and Economy Portfolio Holder – All other complaints.</li> </ul>	
9.6	The MRC will be responsible for ensuring the governing body receives regular information on complaints that provides insight on the landlord's complaint handling performance. This person must have access to suitable information and staff to perform this role and report on their findings.	Yes	The MRCs will receive this through their regular portfolio holder briefings.	



9.7	As a minimum, the MRC and the governing body (or equivalent) must receive: a. regular updates on the volume, categories and outcomes of complaints, alongside complaint handling performance; b. regular reviews of issues and trends arising from complaint handling; c. regular updates on the outcomes of the Ombudsman's investigations and progress made in complying with orders related to severe maladministration findings; and d. annual complaints performance and service improvement report.	Yes	The MRCs will receive this through their regular portfolio holder briefings.  Cabinet will receive two briefings per year as a minimum. One general update and one to include the annual complaints performance and service improvement report.	
9.8	Landlords must have a standard objective in relation to complaint handling for all relevant employees or third parties that reflects the need to: a. have a collaborative and co-operative approach towards resolving complaints, working with colleagues across teams and departments; b. take collective responsibility for any shortfalls identified through complaints, rather than blaming others; and act within the professional standards for engaging with complaints as set by any relevant professional body.	Yes	Training is delivered to the Leadership Team on the importance of complaint handling and the requirements of 9.8 of the code.	



## APPENDIX 2

### NEW FOREST DISTRICT COUNCIL

### LOCAL GOVERNMENT AND SOCIAL CARE OMBUDSMAN COMPLAINT HANDLING CODE SELF ASSESSMENT – MAY 2025

Code section	Action	Do we follow the Code: Yes/No	Explanations and Commentary
<b>1: Definition of a service request and complaint</b>	We recognise the difference between a service request and a complaint, and these are defined in our policies and procedures.	Yes	See the Council's <a href="#">Corporate Complaints Procedure</a> . Sections 3 and 4.
<b>2: Exclusions</b>	Our complaints policy sets out circumstances where we would not consider a complaint. These are reasonable and do not deny individuals access to redress.	Yes	See the Council's <a href="#">Corporate Complaints Procedure</a> . Section 4.
<b>3: Accessibility and awareness</b>	We provide different channels through which individuals can make complaints. These are accessible and we can make reasonable adjustments where necessary	Yes	See the Council's <a href="#">Corporate Complaints Procedure</a> . Section 6.
<b>4: Complaint handling resources</b>	We have designated, sufficient resource assigned to take responsibility for complaint handling. Complaints are viewed as a core service and resourced accordingly.	Yes	

Code section	Action	Do we follow the Code: Yes/No	Explanations and Commentary
<b>5: The complaint handling process</b>	We have a single policy for dealing with complaints covered by the Code and individuals are given the option of raising a complaint where they express dissatisfaction that meets the definition of the complaint in our policy.	Yes	See the Council's <a href="#">Corporate Complaints Procedure</a> .  Section 3.
<b>6: Complaints stages (Stage 1)</b>	We process stage 1 complaints in line with timescales and processes set out in the Code.	Yes	See the Council's <a href="#">Corporate Complaints Procedure</a> .  Section 9.
<b>6: Complaints stages (Stage 2)</b>	We process stage 2 complaints in line with timescales and processes set out in the Code.	Yes	See the Council's <a href="#">Corporate Complaints Procedure</a> .  Section 9.
<b>7: Putting things right</b>	When something has gone wrong we take action to put things right.	Yes	See the Council's <a href="#">Corporate Complaints Procedure</a> .  Section 10.
<b>8: Performance reporting and self-assessment</b>	We produce an annual complaints performance and service improvement report for scrutiny and challenge which includes a self-assessment against the Code.	Yes	This is published online here:  <a href="#">Feedback, comments and complaints - New Forest District Council</a>
<b>9: Scrutiny &amp; Oversight</b>	We have appropriate senior leadership and governance oversight of the complaints process and performance.	Yes	Complaint performance is considered by the Council's Executive Management Team, Scrutiny Panels, Cabinet and Members Responsible for Complaints.

## NEW FOREST DISTRICT COUNCIL

### ANNUAL COMPLAINTS PERFORMANCE AND SERVICE IMPROVEMENT REPORT 2024/2025

#### GOVERNING BODY'S RESPONSE

New Forest District Council understands the importance of complaints in driving improvements to our services and is committed to the effective handling of complaints.

The Council's approach to complaint handling is also in line with the **Corporate Plan 2024 to 2028 for people, place and prosperity** and our values: LEAF:

- **Learning**: we use complaints as an opportunity to learn from our mistakes.
- **Empathy**: we show empathy to complainants.
- **Ambition**: we have ambition to improve our services where it is identified that someone has not received the standard of service that they should have.
- **Fairness**: we are fair to complainants and residents in our complaint handling.

It is recognised that the new Complaint Handling Codes issued by the Local Government and Social Care Ombudsman and Housing Ombudsman have placed enhanced requirements on the Council to ensure our complaint handling meets the expected standards and we have now completed our first full financial year with our procedures and processes aligned to these new and important codes.

We have seen an increase in the number of complaints received by the Council during the past financial year and the Annual Complaints Performance and Service Improvement Report 2024/25 ('the Annual Report') explores the possible reasons for this.

We are pleased that the Annual Report, together with the Council's self-assessments against the Complaint Handling Codes, show that we are compliant. However, we recognise that there continues to be important areas where improvements can be made.

Going forward, the Cabinet, Members Responsible for Complaints, and Scrutiny Panels will monitor and scrutinise the Council's complaints handling and provide constructive challenge where required.

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**Cabinet – 2 July 2025**

## **Local Government Reorganisation – Programme Update, Governance and Resources**

Purpose	For Decision
Classification	Public
Executive Summary	This report provides an update on the Council's Local Government Reorganisation (LGR) work, focusing on key programme governance, risk management, and resource allocation. The programme aims to establish a responsive, resilient, and impactful framework for local government reorganisation, ensuring effective leadership and representation of NFDC priorities.
<b>Recommendations</b>	<p><b>That the Cabinet:-</b></p> <ol style="list-style-type: none"> <li><b>1. Notes the progress made on the development of final local government reorganisation proposals by September 2025.</b></li> <li><b>2. Agrees that the priority for LGR proposals are:-</b> <ol style="list-style-type: none"> <li><b>a. A financially sustainable rural-focused unitary council, bringing together the New Forest area with mid-Hampshire.</b></li> <li><b>b. An authority that does not split the historic communities of the New Forest through boundary changes, or forces the district into an urban-led model.</b></li> </ol> </li> <li><b>3. Supports the active engagement in competing proposals for LGR in Hampshire and the Solent, to best represent and campaign for the above priorities, including the strong opposition to any proposals that involve boundary changes that would</b></li> </ol>

	<p><b>split the historic communities of the New Forest.</b></p> <p><b>4. Supports the establishment of the LGR Programme Governance and Member oversight arrangements detailed in the report, alongside current programme activity and spend incurred from the established LGR reserve.</b></p>
Reasons for recommendations	<p>The recommendations enable the Council to prioritise the development of local government reorganisation proposals that align with the Council's agreed position.</p> <p>They support the Council's objectives within the Corporate Plan, ensuring effective leadership, representation, and resource allocation for the LGR programme and the Council's ongoing service delivery.</p>
Wards	All
Portfolio Holder	Councillor Jill Cleary – Leader
Strategic Director	Kate Ryan – Chief Executive
Officer Contact	<p>Matt Wisdom Assistant Director – Strategy and Engagement (Monitoring Officer) 023 8028 5072 <a href="mailto:matt.wisdom@nfdc.gov.uk">matt.wisdom@nfdc.gov.uk</a></p> <p>Rebecca Drummond Assistant Director – Transformation 023 8028 5080 <a href="mailto:rebecca.drummond@nfdc.gov.uk">rebecca.drummond@nfdc.gov.uk</a></p>



## **Introduction and background**

1. In December 2024, the Government published the English Devolution White Paper: "Power and Partnership: Foundations for Growth," which outlines a model for local government based on strategic authorities alongside unitary councils. The Government aims to bring about an end to the two-tier local government arrangements of separate county and district councils, with unitary councils forming the delivery arm of local government underneath the new strategic authority.
2. The proposed Hampshire and Solent Mayoral Strategic Authority will oversee functions such as strategic growth, spatial development, transport, housing and police and crime. The new unitary councils will form the constituent elements of the strategic authority.
3. Following the publication of the White Paper and the government's subsequent announcement that Hampshire and the Solent would join the Devolution Priority Programme, aiming to establish mayor-led strategic authorities by May 2026, the Leader and Chief Executive have been collaborating with councils across Hampshire and the Solent to respond to the Government's devolution initiative and begin work on proposals for local government reorganisation.
4. This Hampshire and Solent collective work, facilitated by KPMG consultants, has undertaken a significant amount of activity since the Government's invitation for LGR proposals.
5. In depth stakeholder interviews were held with the leaders and chief executives of councils across Hampshire and the Solent as part of the early work to understand the opportunities and challenges for LGR across the area. Meetings and workshops were also held with key council Members and officers, to understand priorities and develop ways to evaluate future options.
6. Initial longlisting workshops were held with leaders and chief executives to discuss and define the options that would be collectively pursued, alongside the development of the eight principles that formed the collective interim plan for LGR. This interim plan was submitted on behalf of all principal councils on 21 March 2025, supported by this Council. Alongside the collective interim plan, the Full Council gave the Leader clear feedback on the priorities to be pursued as part of the next phase of work on LGR.
7. Feedback was received from government on the interim plan on 7 May 2025 and is included in full at Appendix 1. The feedback is summarised in the following section of this report.

8. It is recognised that there are differences across the councils in the priorities to be taken forward for full proposals. The Leader and Chief Executive have been seeking to build alliances to support the Council's preferred outcome, and also to defend the district from any boundary changes that the Council has expressed it does not feel are necessary or justified.
9. This report provides an update on this activity and begins to establish an LGR programme for the New Forest that is responsive, resilient, and impactful in support of the Council's priorities and objectives. Key milestones are included, including the establishment of programme resources, an enhanced plan for community engagement and the steps to be taken in developing and approving final proposals by 26 September 2025.

### **Interim Plan Feedback**

10. The following summarises key feedback included in the government's response to Hampshire and the Solent's interim plan:-
  - Single Tier of Local Government:
    - Proposals should aim for a single tier of local government for the entire area.
    - Further detail on proposed geography and expected outcomes is needed.
  - Isle of Wight Exceptional Circumstances:
    - More detail and data to support the rationale for an 'Island deal' are required.
    - Decisions on specific unitary solutions will be made based on full proposals, not at this point.
  - Deadline for Proposals:
    - The deadline for final proposals is 26 September 2025.
    - Extensions are not possible due to the need to maintain the planned timeline for LGR.
  - Population Criteria:
    - Proposals should consider populations of 500,000 or more, but flexibility is allowed (a guideline, not a hard target).
    - Clear rationale for any deviations from this guideline should be provided.
  - Collaboration and Data Sharing:
    - Effective collaboration between councils is crucial.
    - Final proposals should use consistent data sets and assumptions.

11. There were also a number of matters which the Hampshire and Solent councils specifically requested further clarity, and the responses to those issues are summarised below:-

- Boundary Changes:
  - Proposals involving boundary changes should provide strong justification.
  - Clear identification of proposed boundaries is necessary as part of final proposals (proposals should include maps).
  - There are a number of mechanisms to achieve boundary changes dependent upon how fundamental they are.
- Critical Service Demand:
  - Detailed financial positions and risk modelling should be included in final proposals.
  - Consideration of council tax harmonisation and financial sustainability is important.
- Support for Implementation:
  - £7.6 million will be available for proposal development across 21 areas.
  - Further detail on transformation costs and financial sustainability is needed.

### **Hampshire and the Solent collective work next phase**

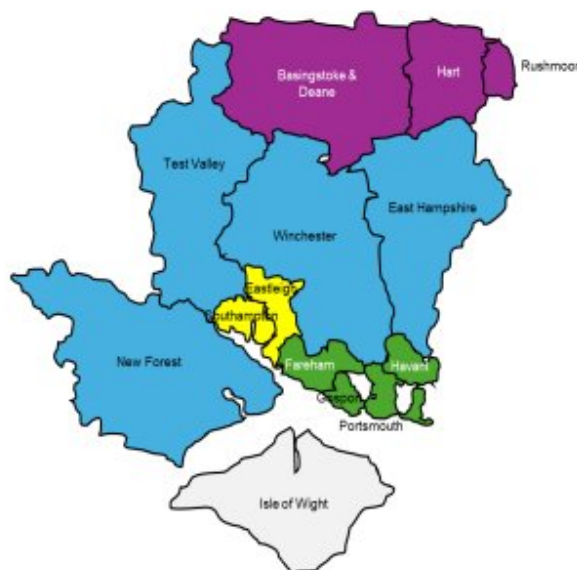
12. Multiple meetings with the chief executives of councils has developed and agreed assessment methodology for use in how options would be considered by leaders in developing final proposals.
13. A defined analysis approach was adopted, to ensure that the development of options are aligned to the government criteria. The consideration of these options with this analysis, aims to provide sufficient information for a compelling case for change as part of the full proposal submission. The analysis, in addition to the government's criteria, includes the guiding principles agreed in the interim plan, financial and service demand analysis and economic market assessments. It will in due course also be informed by public stakeholder engagement.
14. Significant activity across all councils has supported the collation of data for use in this analysis.
15. On 19 May 2025, the Leaders of 13 councils across the region met to consider 7 LGR options which had been refined from a long list of 12 options. The rationale for the shortlisting of options included the robust assessment methodology explained above. The key decision

taken by the leaders at this meeting, was to progress the development of three options to a full case for change phase. These options are as follows:-

16. Option 1 – Four unitary councils comprising the following current district/borough/unitary council areas:-

- Portsmouth, Fareham, Havant, Gosport
- Southampton, Eastleigh
- Basingstoke & Deane, Hart, Rushmoor
- New Forest, Test Valley, East Hampshire, Winchester

This option is supported by NFDC and is the basis for our positive work developing further the vision and case for a future council based on this footprint. The map for this footprint is outlined below.



17. Option 2 – Four unitary councils comprising the following current district/borough/unitary council areas:-

- Portsmouth, Fareham, Havant, Gosport
- Southampton, Eastleigh, New Forest
- Basingstoke & Deane, Hart, Rushmoor
- Test Valley, East Hampshire, Winchester

This option has been consistently opposed by NFDC as it does not deliver a future council that reflects local identity, and there are

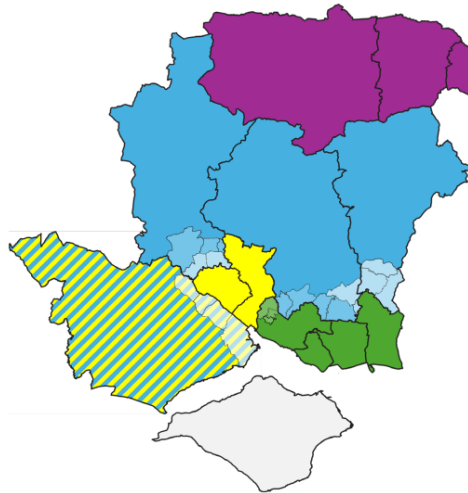
questions as to whether it is the best model to develop future sustainable services. The map for this footprint is outlined below:-



18. Option 3 – Four unitary councils, modelled on Options 1 and 2 which include the consideration of boundary changes to the current district/borough council areas of New Forest, Test Valley, Winchester and East Hampshire. This option has been consistently opposed by the New Forest as it was confirmed that the wards intended to become part of a council with Southampton and Eastleigh would be substantive and include the following from the New Forest District:-

- Totton North
- Totton Central
- Totton South
- Marchwood & Eling
- Dibden & Dibden Purlieu
- Hythe Central
- Hythe South
- Hardley, Holbury & North Blackfield
- Fawley Blackfield Calshot & Langley

This can also be described as splitting the parishes of Totton and Eling, Marchwood, Hythe and Dibden and Fawley from the remainder of the New Forest District. The map for this footprint that shows the areas being considered for boundary changes is outlined below and Appendix 2 shows a map of the proposed split in detail:-



19. It should be noted that prior to the leaders' workshop, Hampshire County Council and East Hampshire District Council withdrew from the collective work being facilitated by KMPG. Gosport Borough Council has also since withdrawn. 12 councils remain engaged in these collective conversations and the associated officer workstreams.
20. The next phase of work facilitated by KPMG will involve the preparation of a case for change that takes forward these three options with a single submission to Government being anticipated. A separate submission is anticipated, led by Hampshire County Council.
21. Hampshire County Council are taking forward a separate analysis of four models, and will be selecting their final preference in July. Further information can be found on the County Council's website from the link in the background papers of this report. NFDC is disappointed that none of these proposals reflect what the district's towns, parishes and residents have told us thus far, as to what matters for the New Forest in developing the future of local government in the area. It is important that Hampshire County Council Members are clear on the views of New Forest District Council, local stakeholders and residents to inform the selection of a competing submission to Government.
22. It must be remembered that it is Government (MHCLG) who will be then considering the proposals, and running a formal consultation before taking a decision on the future of local government across Hampshire and the Solent.
23. A significant step change in activity has taken place, particularly involving officers of the council, through the mobilising of programme governance and workstreams to include data, finance, service design,

partner and public engagement, democratic and community representation. Service design workshops are currently being held with senior council officer leads across Education, Customer and Digital, Highways, Adults, Children's, Housing and Homelessness, Waste and Strategic Planning and Regeneration.

24. Work to assess the implications of boundary changes is also taking place, supported by the collation of a number of data sets including population statistics, council tax and business rate metrics, housing and homelessness data, planning, assets and open spaces.

### **NFDC key activity and decisions taken**

25. Since the agreement of the interim plan in March 2025, the Leader, Chief Executive and officer team have been working at a significant pace to pursue the council's priorities for LGR. This has involved the collective work with KPMG above, in addition to the building of alliances with key local authority partners, and a significant programme of stakeholder engagement including meetings with MHCLG, the District Council's Network, New Forest MPs, the National Park Authority, the Official Verderer of the New Forest, key businesses, community organisations and Town and Parish Councils.
26. A specific workstream has been progressed in partnership with local authorities into Mid Hampshire, to shape a shared narrative that provides a compelling case for change in respect of the council's priorities for LGR. This includes case studies and further operational detail that will support Option 1.
27. The Council will need to focus on developing and approving a final proposal ahead of the government deadline of 26 September 2025. The period ahead will continue to involve extensive consultation and collaboration to ensure proposals align with NFDC priorities and to engage with and address counter proposals.
28. The Council agreed an initial LGR reserve of £150,000, alongside an ongoing revenue budget of £150,000, to support the necessary activity over the coming months. The following paragraphs summarise the commissioned work and resources being secured against these budgets to date.
29. A Hampshire wide consultation, supported by all 12 councils working collectively with KPMG will launch on 30 June. It is essential that our residents, businesses, towns and parishes and all stakeholders respond to this in representing the views of all our communities.

30. From initial engagement work the Council has undertaken, alongside the expressed intention of the proposed boundary change option, it is clear that a detailed case will be developed by some councils that attempts to split the New Forest. This proposal will need to address the guidance of the Local Government Boundary Commission for England, and demonstrate a compelling case to government for such changes. In response, the council is developing key messages, service logistics, financial, legal, housing, governance and place assessments to counter this proposal. A place-shaping exercise was externally commissioned to capture the identity, character and personality of the various waterside communities.
31. To support the work above on the case development and wider engagement, the Chief Executive, in consultation with the Leader of the Council, has commissioned external strategic engagement, and campaign support. This will also enable the Council to programme communications for members, staff, and stakeholders on LGR activity in a clear and consistent way, whilst delivering the significant communications activity this year, which includes the Council's new waste and recycling service.
32. Alongside this, deliberative engagement is being externally commissioned. This will include a number of online and in-person focus group sessions, with a representative sample of the district's residents including hard to reach communities. The evidence from these sessions will inform the final case for change and the development of options.
33. To ensure an effective and responsive programme can be maintained, particularly moving into the implementation phase, two internal resources have been identified, a Programme Manager and a GIS/Mapping data lead. Both of these posts are currently being recruited to.

## **Timeline**

34. The following timeline summarises the LGR programme activity in support of the wider government timetable:-



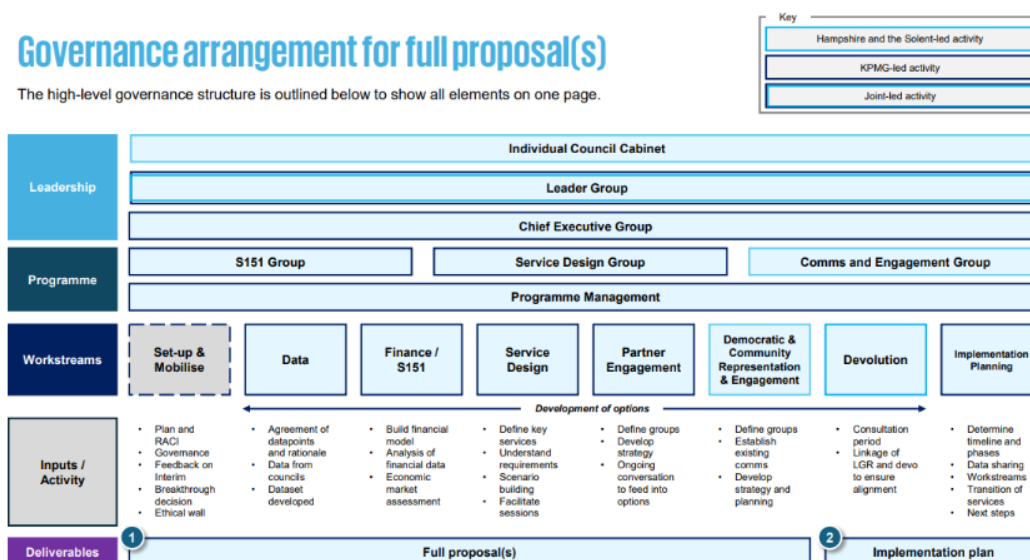
<b>April – September 2025</b>	<p>Stand up programme approach</p> <p>Finalise local authority alliance for NFDC proposal</p> <p>Develop and approve final proposal - (26 September deadline)</p> <p>Counter alternative proposals including local campaigns</p> <p>Government response to Devolution consultation and next steps</p>
<b>September 2025 – January 2026</b>	<p>Influence Government decision making</p> <p>Respond to Government LGR consultation</p> <p>Devolution legislation laid</p>
<b>February – April 2026</b>	<p>Respond to Government decision on LGR (due by 'Spring 2026')</p> <p>Step up implementation</p>
<b>May – September 2026</b>	<p>Mayoral Elections (May)</p> <p>HCC elections (May) TBC</p>
<b>September – December 2026</b>	<p>LGR legislation laid</p>
<b>May 2027</b>	<p>Shadow unitary council elections</p>
<b>May 2028</b>	<p>New unitary councils go-live</p>

35. Looking beyond the current period to September 2025, the Council will need to influence Government decision-making and respond to consultations. This phase will be critical in shaping the final outcome of the LGR programme. Following the Government decision, the Council will be required to step up implementation, ensuring a smooth transition and effective execution of the programme to deliver new unitary councils.

### **Programme Governance**

36. Devolution programme governance is established and officers are supporting the lead upper tier local authorities across Hampshire and the Solent to oversee the implementation of the Mayoral Combined County Authority (MCCA).

37. The Council is represented within the KPMG programme governance, with formal LGR governance to be established once a government decision has confirmed the final geography for the future of local government across Hampshire and the Solent. The following image is a snapshot of the KPMG programme governance for the full proposal phase:-



38. Experience from previous reorganisations highlights the importance of programme capacity and the demands that fall initially on corporate services. It is proposed to establish initial programme governance within the council to enable us to prepare and support the wider work, and also oversee the New Forest specific proposals and workstreams such as town and parish council engagement.
39. To ensure a cohesive and efficient approach to significant organisational change, the governance structure for the LGR programme will be aligned with the existing governance arrangements for the Transformation programme. This integration enables a joined up programme management approach, allowing the flexible deployment of resources, capacity, and expertise across both initiatives.
40. In accordance with this revised governance framework, Member oversight of the LGR programme will be conducted through the Transformation/LGR Member Oversight Board. This board, formerly known as the Transformation Member Oversight Board, is chaired by the Leader of the Council and includes the Deputy Leader, the Portfolio Holder for Finance and Corporate, and the Leader of the Main Opposition Group.
41. The existing Transformation Programme Board, which meets monthly and is chaired by the Chief Executive, will be reconstituted as the

Transformation/LGR Programme Board. This board comprises all Strategic Directors and Assistant Directors. It will be responsible for making delegated key decisions, setting the strategic direction of the programme, and receiving progress updates from programme workstreams and subject matter experts.

42. To support the timely delivery of critical activities, an LGR Steering Group will be established. This group will meet bi-weekly and will initially consist of the Executive Management Team and the Assistant Directors for Strategy, Transformation, and Place Development. When appointed the LGR Programme Manager will facilitate this group.
43. This is an initial model and workstreams will develop over time, particularly through the implementation phase once it is known who the council's key partners are in delivering a safe and legal new unitary council that includes the New Forest District.
44. The programme will be supported by corporate services; bringing together finance, estates, legal, IT, HR and communications. Indicative workstreams are likely to focus on initial pieces of work around NFDC LGR proposals (including development of the business case, the local strategic narrative and engagement activity), establishment of the Mayoral Combined Authority and the transfer of community assets and services. These will be supported by a number of enabling workstreams that will be stood up as required. It is anticipated these will include:
  - Programme core (governance, programme administration, risks and budget)
  - Resources (Finance, legal advice, contracts, procurement and assets)
  - People (HR, workforce, organisation development and internal engagement)
  - Data and ICT (Place and people based datasets, service data, ICT systems and technology)
  - Communications and Engagement (External communications, stakeholder engagement, local campaign management and public consultation)
45. The full resource requirements cannot be anticipated at this stage, however there will be an increasing draw on key service leads. It is to the benefit of the New Forest to support staff engaging in the development of both the strategic authority and the formation of new unitary councils. There is also likely to be an increase in turnover both within NFDC and in other councils. Solutions may be sought that involve interim resource or wider partnership working such as

secondments. There will also be an increasing need to support staff, including the prioritisation of resource to deliver the People Strategy.

### **Corporate plan priorities**

46. A well resourced LGR programme will ensure that the Council has adequate capacity to deliver on its own corporate plan priorities over the remaining life of the plan.

### **Options appraisal**

47. The Council could choose not to engage with the collective KPMG work, or with any competing proposals. At this stage, it is recommended that securing the best outcome for the residents of the New Forest is achieved by participating in and shaping all proposals and conversations with partners.

### **Consultation undertaken**

48. Consultation on the developing LGR programme has been undertaken with the Leader of the Council, Cabinet Members, Group Leaders, the Transformation Programme Board and wider engagement with senior leadership team and staff.
49. Town and Parish Councils were engaged in the development of the Council's approach to LGR at an event on 28 April 2025, which included specific feedback regarding options and the Asset Strategy.

### **Financial and resource implications**

50. A 2025/26 ongoing revenue budget of £150,000 was agreed by the Council in February 2025, for Devolution and LGR activity. A £150,000 one off Devolution and LGR reserve was also approved in February, and is available to support one-off or temporary resourcing requirements in support of the LGR programme. The provisional budget outturn proposes that Cabinet approve that an additional £350,000 is placed into the reserve.
51. At present, the committed spend on commissioned activity from the reserve is £93,000. The general fund budget spend for 2025/26 is currently profiled to be £140,000.

### **Legal implications**

52. The programme workstreams will include the legal framework for establishing new unitary councils. There are no specific legal implications arising from the recommendations in this report.

## **Risk assessment**

53. With a programme approach being established, key risks, mitigations and residual risks are being monitored at regular intervals.

## **Environmental / Climate and nature implications**

54. A key aspect of service design for new unitary councils will be the approach to carbon reduction and climate and nature actions.

## **Equalities implications**

55. The approach to consultation and engagement will include the recruitment of participants across a range of protected characteristics, including those with a long term health condition or disability.

## **Crime and disorder implications**

56. None arising directly from the report.

## **Data protection / Information governance / ICT implications**

57. None arising directly from the report.

## **New Forest National Park implications**

58. The proposed geography for new unitary councils could have a material impact on the National Park. It is now clear that options are being proposed that would see the New Forest National Park boundary split in a significant number of places along the waterside. The council will campaign for an LGR model that will allow for a new unitary to continue the strong partnership working that enables the council to fulfil its obligation to further the interests of the National Park.

### **Appendices:**

Appendix 1 – Interim Plan  
Feedback  
Appendix 2 – Waterside parishes  
map

### **Background Papers:**

Cabinet agenda and papers – 21  
March 2025  
Hampshire County Council Update  
– June 2025

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Ministry of Housing,  
Communities &  
Local Government

7 May 2025

## **LOCAL GOVERNMENT REORGANISATION**

### **INTERIM PLAN FEEDBACK: HAMPSHIRE, ISLE OF WIGHT, PORTSMOUTH AND SOUTHAMPTON**

To the Chief Executives of:

Basingstoke and Deane Borough Council

East Hampshire District Council

Eastleigh Borough Council

Fareham Borough Council

Gosport Borough Council

Hampshire County Council

Hart District Council

Havant Borough Council

New Forest District Council

Rushmoor Borough Council

Test Valley Borough Council

Winchester City Council

Isle of Wight Council

Portsmouth City Council

Southampton City Council

#### **Overview:**

Thank you for submitting your interim plan. The thought from all councils is clear to see. For the final proposals, each council can submit a single proposal for which there must be a clear single option and geography and, as set out in the guidance, we expect this to be for the area as a whole; that is, the whole of the area to which the 5 February invitation was issued.

Our aim for the feedback on interim plans is to support areas to develop final proposals. This stage is not a decision-making point, and our feedback does not seek to approve or reject any option being considered.

The feedback provided relates to the following interim plan submitted by Hampshire, Isle of Wight, Portsmouth and Southampton councils:

- the Hampshire and the Solent, Local Government Reorganisation Plan, 21 March 2025, signed by all councils in Hampshire and the Solent

We have provided feedback on behalf of central government. It takes the form of:

1. A summary of the main feedback points;
2. Our response to the specific barriers and challenges raised in your plans; and
3. An annex with more detailed feedback against each of the interim plan asks.

We reference the guidance criteria included in the invitation letter throughout, a copy of which can be found at [Letter: Hampshire, Isle of Wight, Portsmouth and Southampton – GOV.UK](#). Our central message is to build on your initial work and ensure that final proposal(s) address the criteria and are supported by data and evidence. We recommend that final proposal(s) should use the same assumptions and data sets or be clear where and why there is a difference.

We welcome the work that has been undertaken to develop Local Government Reorganisation (LGR) plans for Hampshire, Isle of Wight, Portsmouth and Southampton. This feedback does not seek to approve or discount any proposal, but provide some feedback designed to assist in the development of final proposals. We will assess final proposals against the guidance criteria provided in the invitation letter and have tailored this feedback to identify where additional information may be helpful in enabling that assessment. Please note that this feedback is not exhaustive and should not preclude the inclusion of additional materials or evidence in the final proposals. In addition, your named area lead, Jesse Garrick, will be able to provide support and help address any further questions or queries.

We are providing written feedback to each invitation area.

### **Summary of Feedback:**

We have summarised the key elements of the feedback below, with further detail provided in Annex A.

1. The criteria asks that a proposal should seek to achieve for the whole area, the establishment of a single tier of local government (see criterion 1). **We recognise that plans are at an early stage and further analysis is planned in the run up to submitting the final proposal(s). Further detail on a proposed geography for new unitary authorities and evidence on the outcomes that are expected to be achieved for the whole area would be welcome.**
2. As set out in the invitation letter, the interim plan process is designed to help support you to develop final proposals. We note your argument regarding the Isle of Wight's exceptional circumstances and request for an 'Island deal'. As you know, **interim plans are not a decision-making point; decisions will be made on the basis of full proposals, and so any decision on a specific unitary solution for**



the Isle of Wight would need to be taken at that point too. More detail on the rationale would be helpful, and you may wish to support existing narratives with data. We have provided more information on addressing the population criteria below.

3. You asked if it was possible to extend the timeframe for providing LGR proposals until November. **As per your invitation, the deadline is the 26 September. The deadline for submitting a proposal has been designed to give areas as much time as possible to develop their final proposals. The timescales for submission are generally more generous than in previous reorganisation exercises. Ministers have set clear timelines, which were determined in the context of decisions to postpone elections, that were not taken lightly. It is important that final proposal(s) are submitted by 26 September 2025 to allow for LGR to take place as planned.**
4. In some of the options you are considering populations that would be below 500,000. As set out in the Statutory Invitation guidance and in the English Devolution White Paper, we outlined a population size of 500,000 or more. This is a guiding principle, not a hard target – we understand that there should be flexibility, especially given our ambition to build out devolution and take account of housing growth, alongside local government reorganisation. **All proposals, whether they are at the guided level, above it, or below it, should set out the rationale for the proposed approach clearly.**
5. We welcome steps taken to come together, as per criterion 4:
  - a. **Effective collaboration between all councils will be crucial; we would encourage you to continue to build strong relationships and agree ways of working, including around effective data sharing. This will support the development of a robust shared evidence base to underpin final proposal(s).**
  - b. **It would be helpful if final proposal(s) use the same assumptions and data sets.**
  - c. **It would be helpful if your final proposal(s) set out how the data and evidence supports all the outcomes you have included and how well they meet the assessment criteria in the invitation letter.**
  - d. **You may wish to consider an options appraisal that will help demonstrate why your proposed approach best meets the assessment criteria in the invitation letter, compared to any alternatives.**

## **Response to specific barriers and challenges raised**

Please see below our response to the specific barriers and challenges that were raised in your interim plan:

### **1. Principle of boundary changes**

We note your desire to develop unitary councils that reflect the current major economies and communities of Hampshire and the Solent and that some of your proposals may lead to boundary changes.

As the Invitation sets out, boundary changes are possible, but that “existing district areas should be considered the building blocks for proposals, but where there is a strong justification more complex boundary changes will be considered.”

The final proposal must specify the area for any new unitary council(s). If a boundary change is part of your final proposal, then you should be clear on the boundary proposed, which could be identified by a parish or ward boundary, or if creating new boundaries by attaching a map.

Proposals should be developed having regard to the statutory guidance which sets out the criteria against which proposals will be assessed (including that listed above). If a decision is taken to implement a proposal, boundary change can be achieved alongside structural change. Alternatively, you could make a proposal for unitary local government using existing district building blocks and consider requesting a Principal Area Boundary Review (PABR) later.

Such reviews have been used for minor amendments to a boundary where both councils have requested a review – such as the recent Sheffield/Barnsley boundary adjustment for a new housing estate. PABRs are the responsibility of the Local Government Boundary Commission for England who will consider such requests on a case-by-case.

### **2. Isle of Wight exceptional circumstances**

You asked for an early decision on the position of the Isle of Wight and to discuss an ‘Island deal’. As set out above this is not a decision-making point so we cannot make any judgments at this time.

We welcome the additional thinking conducted regarding the Isle of Wight. If pursuing this option, it would be helpful to build on the existing rationale and provide a full assessment against each criterion in your final proposal(s).

### **3. Critical service demand**

We note your demand pressures, your different council tax bases, the levels of deprivation and challenges posed by climate change and coastal flooding. It would be helpful if detail on the councils' financial positions and further modelling on risks is set out in detail in the final proposal(s).

With regards to council tax, restructured councils often inherit different council tax levels from their predecessors. There is an established flexible system in legislation for the harmonisation of council tax levels over seven years.

### **4. Support for implementation and ongoing financial stability**

We note the financial pressures in Hampshire and the Solent, plus your request for support on transformation opportunities, autonomy to be flexible around council tax and desire to agree multi-year financial arrangements.

£7.6 million will be made available in the form of local government reorganisation proposal development contributions, to be split across the 21 areas. Further information will be provided on this funding.

In terms of transitional costs as per invitation letter, we expect that areas will be able to meet transition costs over time from existing budgets, including from the flexible use of capital receipts that can support authorities in taking forward transformation and invest-to-save projects. We would welcome further detail on your estimated transformation costs against full proposals. This may be something you wish to pick up with your MHCLG LGR area lead, Jesse Garrick.

We also note your points around the financial pressures councils are facing. It would be helpful if detail on the councils' financial positions and further modelling could be set out in detail in the final proposal(s).

### **5. Timeline**

You have asked for an extension to the 28 November 2025 to provide proposals. As set out above, it is important that final proposal(s) are submitted by 26 September 2025 to allow for LGR to take place as planned.

**ANNEX A: Detailed feedback on criteria for interim plan**

<b>Ask – Interim Plan Criteria</b>	<b>Feedback</b>
<p>Identify the likely options for the size and boundaries of new councils that will offer the best structures for delivery of high-quality and sustainable public services across the area, along with indicative efficiency saving opportunities.</p> <p>Relevant criteria:</p> <p>1 c) Proposals should be supported by robust evidence and analysis and include an explanation of the outcomes it is expected to achieve, including evidence of estimated costs/benefits and local engagement.</p> <p>&amp;</p> <p>2 a-f) Unitary local government must be the right size to achieve efficiencies, improve capacity and withstand financial shocks.</p> <p>&amp;</p> <p>3 a-c) Unitary structures must prioritise the delivery of high quality and sustainable public services to citizens.</p>	<p>We welcome the initial thinking that has gone into this interim plan and recognise that it is subject to further work. We note the local context and challenges outlined. We appreciate you will be undertaking further analysis, significant further detail that addresses the criteria in the invitation letter and for this to be provided by 26 September would be welcomed.</p> <p>As per criterion 1, the final proposal(s) in accordance with the guidance should put forward a preferred single tier model for the whole invitation area, including describing all the single tier local government structures you are putting forward.</p> <p>Where there are proposed boundary changes, the proposal should provide strong public services and financial sustainability related justification for the change.</p> <p>For the final proposals, each council can submit a single proposal for which there must be a clear single option and geography and, as set out in the guidance, we expect this to be for the area as a whole; that is, the whole of the area to which the 5 February invitation was issued.</p> <p>Given the financial pressures you identify it would also be helpful to understand how efficiency savings have been considered alongside a sense of place and local identity.</p> <p>We recognise that the options outlined in the interim plans are subject to further development. In final proposal(s) it would be helpful to include a high-level financial assessment which covers transition costs and overall forecast operating costs of the new unitary councils.</p> <p>We will assess final proposals against the criteria in the invitation letter. Referencing criteria 1 and 2, you may wish to consider the following bullets:</p> <ul style="list-style-type: none"> <li>• high level breakdowns, for where any efficiency savings will be made, with clarity of assumptions on how estimates have been reached and the data sources used,</li> </ul>

	<p>including differences in assumptions between proposals</p> <ul style="list-style-type: none"> <li>• it would be helpful to understand how efficiency savings have been considered alongside a sense of place and local identity</li> <li>• information on the counterfactual against which efficiency savings are estimated, with values provided for current levels of spending</li> <li>• a clear statement of what assumptions have been made if the impacts of inflation are taken into account</li> <li>• a summary covering sources of uncertainty or risks, with modelling, as well as predicted magnitude and impact of any unquantifiable costs or benefits</li> <li>• where possible, quantified impacts on service provision as well as wider impacts</li> </ul> <p>We recognise that financial analysis will start once options for the geography have been fully identified. The bullets below indicate where information would be helpful. As per criterion 1 and 2, it would be helpful to see:</p> <ul style="list-style-type: none"> <li>• data and evidence to set out how your final proposal(s) would enable financially viable councils across the whole area, including identifying which option best delivers value for money for council taxpayers</li> <li>• further detail on potential finances of new unitaries, for example, funding, operational budgets, potential budget surpluses/shortfalls, total borrowing (General Fund), and debt servicing costs (interest and MRP); and what options may be available for rationalisation of potentially saleable assets</li> <li>• clarity on the underlying assumptions underpinning any modelling e.g. assumptions of future funding, demographic growth and pressures, interest costs, Council Tax, savings earmarked in existing councils' MTFS</li> <li>• financial sustainability both through the period to the creation of new unitary councils as well as afterwards</li> <li>• as criterion 2e states, and recognising that Southampton City Council has received</li> </ul>
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	<p>Exceptional Financial Support, proposals must additionally demonstrate how reorganisation may contribute to putting local government in the area as a whole on a more sustainable footing, and any assumptions around what arrangements may be necessary to make new structures viable</p> <p>We would welcome further details on how services can be maintained if you are proposing fragmentation of services, such as for social care, children's services, SEND, homelessness, and for wider public services including for public safety. Under criterion 3c, you may wish to consider:</p> <ul style="list-style-type: none"> <li>• how will high quality and sustainable services be maintained for a proposed Isle of Wight or other proposed unitaries, for example, what shared services do you have in mind, how will housing or social care needs be met?</li> <li>• what would proposals mean for local services provision? For example: <ul style="list-style-type: none"> <li>○ impact on SEND services and distribution of funding and sufficiency planning to ensure children can access appropriate support, and how will services be maintained?</li> <li>○ what is the impact on adults and children's care services? How will risks to safeguarding to be managed?</li> <li>○ what partnership options have you considered for joint working across the new unitaries for the delivery of social care services?</li> <li>○ what is the impact on schools, support and funding allocation, and sufficiency of places and how will impacts on school be managed? Will the Isle of Wight's support from Hampshire continue?</li> <li>○ what is the impact on safeguarding? How will risks be managed?</li> <li>○ what is the impact of LGR and devolution on skills funding?</li> <li>○ what are the implications for public health, including consideration of socio-demographic challenges and health inequalities within any new</li> </ul> </li> </ul>
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	<p>boundaries and their implications for current and future health service needs. What are the implications for how residents access services and service delivery for populations most at risk?</p> <p>Further detail would also be welcomed on what opportunities for wider public service reform are enabled by the options.</p>
<p>Include indicative costs and arrangements in relation to any options including planning for future service transformation opportunities.</p> <p>Relevant criteria: 2d) Proposals should set out how an area will seek to manage transition costs, including planning for future service transformation opportunities from existing budgets, including from the flexible use of capital receipts that can support authorities in taking forward transformation and invest-to-save projects.</p>	<p>We note the estimation that costs will likely be above £20 million. In the final proposal, we would welcome further clarity on the assumptions and data used to calculate the transition costs and efficiencies (see criterion 2d).</p> <p>As per criterion 2, the final proposal(s) should set out how an area will seek to manage transition costs, including planning for future service transformation opportunities from existing budgets, including from the flexible use of capital receipts that can support authorities in taking forward transformation and invest-to-save projects.</p> <ul style="list-style-type: none"> <li>• within this it would be helpful to provide detailed analysis on expected transition and/or disaggregation costs and potential efficiencies of proposals. This could include clarity on methodology, assumptions, data used, what year these may apply and why these are appropriate</li> <li>• detail on the potential service transformation opportunities and invest-to-save projects from unitarisation across a range of services -e.g. consolidation of waste collection and disposal services, and will different options provide different opportunities for back-office efficiency savings?</li> <li>• where it has not been possible to monetise or quantify impacts, you may wish to provide an estimated magnitude and likelihood of impact.</li> <li>• summarise any sources of risks, uncertainty and key dependencies related to the modelling and analysis</li> <li>• detail on the estimated financial sustainability of proposed reorganisation and how debt could be managed locally.</li> </ul>



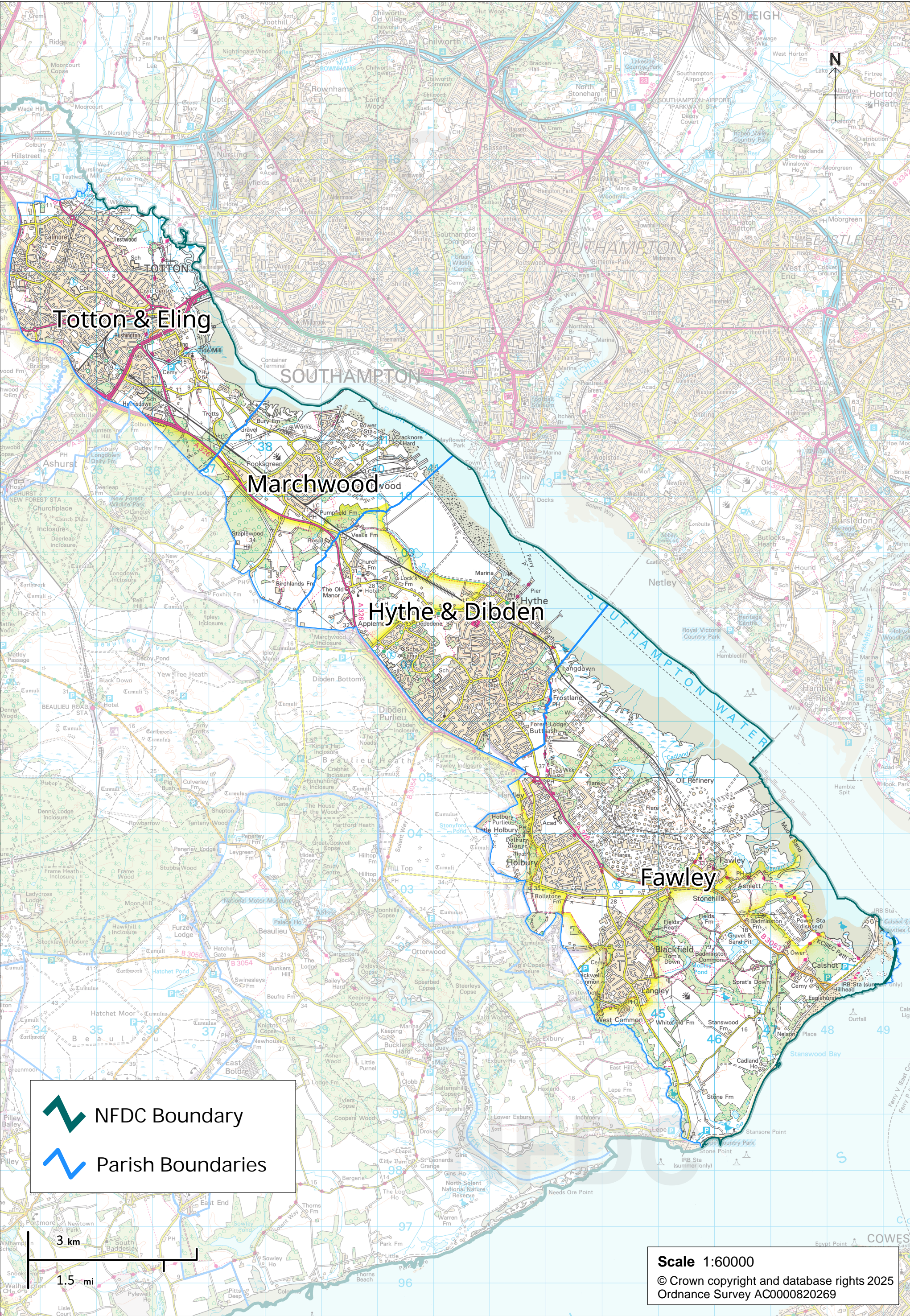
	<p>We note the financial challenges highlighted in your response. It would be helpful if detail on the councils' financial positions and further modelling is set out in detail in the final proposal.</p> <p>We welcome the joint work you have done to date and recommend that all options and proposals should use the same assumptions and data sets or be clear where and why there is a difference (linked to criterion 1c).</p>
<p>Include early views as to the councillor numbers that will ensure both effective democratic representation for all parts of the area, and also effective governance and decision-making arrangements which will balance the unique needs of your cities, towns, rural and coastal areas, in line with the Local Government Boundary Commission for England guidance.</p> <p>Relevant criteria: 6) New unitary structures should enable stronger community engagement and deliver genuine opportunity for neighbourhood empowerment.</p>	<p>New unitary structures should enable stronger community engagement and deliver genuine opportunity for neighbourhood empowerment.</p> <p>Additional details on how the community will be engaged specifically how the governance, participation and local voice will be addressed to strengthen local engagement, and democratic decision-making would be helpful.</p> <p>In your final proposal(s) we would welcome detail on your plans for neighbourhood-based governance, the impact on parish councils, and thoughts about formal neighbourhood partnerships and area committees.</p>
<p>Include early views on how new structures will support devolution ambitions.</p> <p>Relevant criteria: 5a-c) New unitary structures must support devolution arrangements.</p>	<p>Further detail would be welcome in all plans on how the proposed new structures would support arrangements for the proposed Hampshire and the Solent Mayoral Strategic Authority (MSA).</p> <p>We welcome the area's commitment to devolution, and the adoption of the principle that governance arrangements in a future MSA should continue to equally represent all areas following LGR. Across all proposals, looking towards a potential future MSA, it would be beneficial to provide an assessment that outlines if there are benefits and disadvantages in how each option would interact with an MSA and best benefit the local community, including meeting devolution statutory tests.</p>



	<p>More detail would also be welcome on the implications of the various LGR options for the timelines and management of devolution across the Hampshire and the Solent geography. While we cannot pre-judge devolution decisions, we are happy to discuss further any eventual transition period as the new unitary authorities and potential MSA are established.</p> <p>We would welcome continued engagement with the Police and Crime Commissioner, Members of Parliaments and wider local stakeholders as you continue to develop your proposal(s).</p> <p>To note, an MSA is the same as a Mayoral Combined Authority or Mayoral Combined County Authority.</p>
<p>Include a summary of local engagement that has been undertaken and any views expressed, along with your further plans for wide local engagement to help shape your developing proposals.</p> <p>Relevant criteria: 6a-b) new unitary structures should enable stronger community engagement and deliver genuine opportunity for neighbourhood empowerment.</p>	<p>We welcome your interim update against criterion 6, the engagement undertaken so far and your plans for the future. It is for you to decide how best to engage locally in a meaningful and constructive way with residents, voluntary sector, local community groups, neighbourhood boards, parish councils, public sector providers, such as health, police and fire, and local businesses to inform your proposals.</p> <p>You may wish to engage in particular with those who may be affected by any proposed disaggregation of services. It would be helpful to see further detail of your engagement plans and to provide detail that demonstrates how local ideas and views have been incorporated into any final proposal(s).</p>
<p>Set out indicative costs of preparing proposals and standing up an implementation team as well as any arrangements proposed to coordinate potential capacity funding across the area.</p> <p>Relevant criteria: 2d) Proposals should set out how an area will seek to manage transition costs, including planning for future service transformation</p>	<p>We would welcome further detail in final proposal(s) over the level of cost and the extent to which the costs are for delivery of the unitary structures or for transformation activity that delivers benefits (see criterion 2d).</p> <p>£7.6 million will be made available in the form of local government reorganisation proposal development contributions, to be split across the 21 areas. Further information will be provided on this funding.</p>

<p>opportunities from existing budgets, including from the flexible use of capital receipts that can support authorities in taking forward transformation and invest-to-save projects.</p>	
<p>Set out any voluntary arrangements that have been agreed to keep all councils involved in discussions as this work moves forward and to help balance the decisions needed now to maintain service delivery and ensure value for money for council taxpayers, with those key decisions that will affect the future success of any new councils in the area.</p> <p>Relevant criteria: 4 a-c) Proposals should show how councils in the area have sought to work together in coming to a view that meets local needs and is informed by local views.</p>	<p>We welcome the ways of working together you have outlined in the interim plan (see criterion 4).</p> <p>Effective collaboration between all councils will be crucial; areas will need to build strong relationships and agree ways of working, including around effective data sharing.</p> <p>This will enable you to develop a robust shared evidence base to underpin final proposals (see criterion 1c). We recommend that final proposals should use the same assumptions and data sets or be clear where and why there is a difference.</p>







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## Resources & Transformation Overview and Scrutiny Panel – 26 June 2025

**Cabinet – 2 July 2025 / Council 14 July 2025**

### Strategic Asset Management Plan

Purpose	For Decision
Classification	Public
Executive Summary	<p>This report introduces the council's Strategic Asset Management Plan 2025-28 ('SAMP'), Asset Disposal and Community Asset Transfer Policies.</p> <p>By reviewing the operating context both within and outside the Council, the SAMP sets out the main priorities and high-level actions by which the Council intends to manage its property assets over a 3-year period.</p> <p>The aim of the SAMP is to enable the council to review its property assets to better pursue its corporate goals, which may enable existing sites to be repurposed for other priorities.</p> <p>It will also allow us to focus on Best Value in relation to property – through aspects such as improving occupancy of our service buildings and optimising the income received through our leased estate.</p> <p>The New Forest District Council Strategic Asset Management Plan 2025-28, Disposal Policy and Community Asset Transfer Policy are appended in full at the end of this report.</p>
Recommendation(s)	<p><b>That Cabinet recommend that Council approve:</b></p> <ol style="list-style-type: none"> <li><b>1. the Strategic Asset Management Plan 2025-28 ('SAMP') and the high-level actions which flow from the Plan.</b></li> <li><b>2. the Asset Disposal Policy.</b></li> </ol>

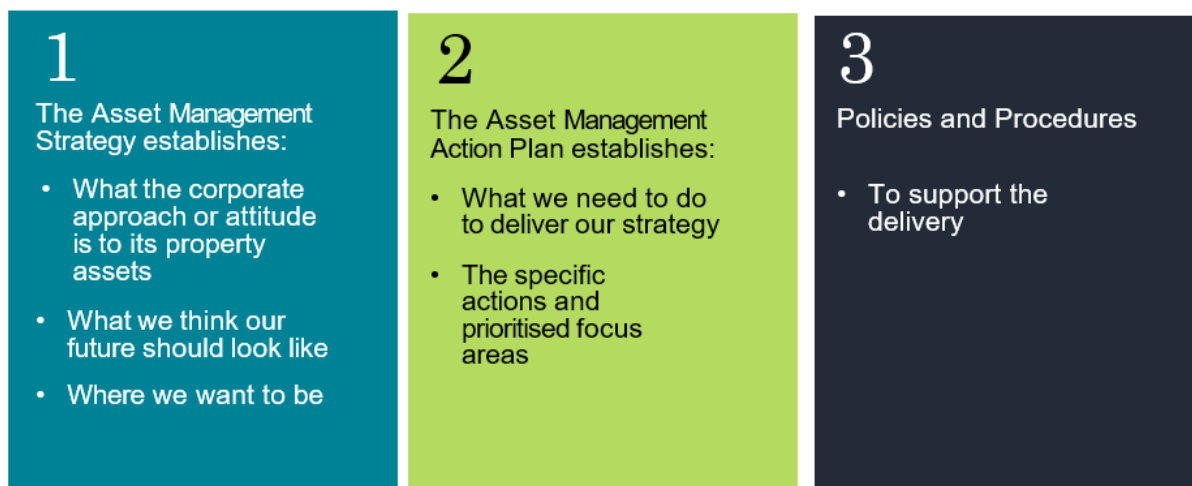
	<p><b>3. the Community Asset Transfer policy.</b></p> <p><b>4. the re-direction of the £1.5 million Corporate Priorities reserve to support the delivery of the SAMP, resulting in the full budget equalisation reserve being available to support budget preparation over the medium term period.</b></p> <p><b>5. the approval of a delegation to the Strategic Director Corporate Resources and Transformation to drawdown the Corporate Priorities reserve for the purposes of SAMP delivery, in consultation with the Portfolio Holder for Corporate Resources.</b></p> <p><b>6. the approval of a delegation to the Chief Executive and Strategic Director Corporate Resources and Transformation in their positions as Transformation Board members, to take decisions in accordance with the Governance arrangements as set out in the SAMP and associated policies.</b></p>
Reasons for recommendation(s)	<p>The Strategic Asset Management Plan allows the Council to set out longer-term goals in respect of its property assets, thereby aligning property to key corporate priorities. The development of the plan also aligns with the recommendations of the Corporate Peer Challenge report (December 2024) and supports the preparedness for Local Government Reorganisation (LGR).</p> <p>This plan is closely aligned to the strategic objectives within the corporate plan, transformation strategy, customer strategy and people strategy.</p>
Ward(s)	All

Portfolio Holder(s)	Councillor Jeremy Heron – Portfolio Holder for Finance and Corporate
Strategic Director(s)	Alan Bethune – Corporate Resources & Transformation
Officer Contact	Alan Bethune – Strategic Director Corporate resources & Transformation 023 8028 5001 Alan.Bethune@nfdc.gov.uk

## Introduction and background

1. It is recognised good practice for local authorities to produce a Strategic Asset Management Plan setting out their broad objectives for the management, development and rationalisation of their built and land asset base over a three-to-five-year period. The recent Corporate Peer Challenge also made recommendations as to the establishment of a Strategic Asset Management Plan and action plan. Due to ongoing discussions in relation to devolution and local government reorganisation this SAMP covers a three-year period.
2. A Strategic Asset Management Plan (SAMP) sets out what the council intends to do in the future to ensure property assets support corporate priorities.
3. The challenge facing all local authorities is that we must continue to deliver effective services with ever decreasing resources and competing demands. The financial constraints and uncertainty in the wider economy bring additional challenges. In this context, it is essential that we take a strategic view of our asset portfolio to deliver our corporate priorities and achieve the best value for money possible from our assets.
4. Effective asset management is a key element of Future New Forest, the Council's transformation strategy and is vital for achieving the council's strategic priorities and driving service improvements, with asset rationalisation playing a key role in reducing costs and enhancing efficiency. The strategic deployment of land and property assets supports core objectives such as maintaining a clean and welcoming environment, empowering neighbourhoods, and fostering economic growth through inward investment and job creation. Given the high capital and operational costs associated with property assets, a structured asset management approach is essential to ensure value for money through optimal use, maintenance, and income generation over the asset lifecycle.

5. The SAMP covers General Fund assets (non-housing stock) and not those contained within the ring-fenced Housing Revenue Account.
6. The new Strategic Asset Management Plan (**Appendix 1**) is a suite of living documents, divided into three clear parts that can be updated separately to remain relevant. The framework is made up of 3 core sections;



7. The Strategic Asset Management Plan 2025-2028 centres around the delivery of five pillars with interlinked objectives and will provide an overview of our land and property estate (excluding housing).

These are:

#### **a. Digital Asset Management**

- i. To 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.
- ii. To 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.

#### **b. Asset Optimisation in Support of Corporate Plan Priorities**

- i. 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.



- ii. To ensure ownership and occupation of assets is robustly challenged.

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

- i. To enable transfer of management / ownership of the asset where it can provide a benefit to service delivery and demonstrate longer term benefit.
- ii. Maximise efficient use of our assets through collaborative working with partners.

**d. To Reduce the Environmental Impact of Council Assets**

- i. Champion reduction in the Environmental impact of occupation, use, travel and waste.

**e. To Support Economic Growth, Regeneration and Prosperity**

- i. We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation.
- ii. We will work with key partners to support our business base and economic centres to thrive and grow.

**Estate Overview**

- 8. Property assets play a critical 'enabling' role within the Council: accommodating services; underpinning our finances; and supporting our wider aims of local economic and social development.
- 9. In relation to the General Fund New Forest District Council owns over 366 separately listed non-dwelling building and land assets covering a combined 770 hectares. With a book value of over £107.4M and an annual holistic running costs of £4.9M.
- 10. Property holdings range from administrative office buildings, operational buildings situated in the community (such as community halls and public conveniences) and more complex operational sites (such as depots). They are held on a mixture of tenures, freehold (predominantly) and leasehold.
- 11. They can be summarised in the following categories;
  - a. 14 Investment properties
  - b. 148 Non-operational Assets

c. 204 Operational Assets

## **Implementation**

12. The SAMP includes sections under the heading of 'Asset Management Action Plan'. These sections set out the high-level roadmap actions which will be required to implement the SAMP. Each of the strategic pillars has clear objectives and an annual action delivery plan for the 3-year period. The Estates, Valuation and Facilities department will lead on these, in partnership with services.
13. Following adoption of the SAMP, these will be further developed by the Estates, Valuation and Facilities department into a detailed 'Living Action Plan'. This action planning will ultimately be integrated into the work programmes of the corporate property services – Facilities Management, Asset Management, and Capital Delivery – as appropriate.
14. As part of the above, an Asset Review project will be undertaken, including a risk based five-yearly asset condition survey which will then guide a future phase in terms of deciding which assets to retain, which to make further investment in, and which to repurpose for other uses, as part of the Asset Challenge Framework included within the SAMP.
15. Aligned to the action plan understanding the condition of our assets will be prioritised, along with specific investment to ensure the longevity of key community facilities. Opportunities for open space transfer to support sport and recreation will also be prioritised.

## **Governance**

16. The Council recognises that good governance is a key component of this strategy, so it is essential that all decisions to dispose of or acquire an asset must be subject to clear governance process.
17. The SAMP provides clear governance guidelines for
  - a. Asset disposal
  - b. Community Asset Transfer
18. Each governance process has clear owners and defined roles and responsibilities to progress matters and attain necessary approvals. Further details are contained within the relevant respective policy documentations.
19. In the case of asset transfer or disposal specific delegation is given within the governance matrices to the Chief Executive and the Strategic Director (Corporate Resources and Transformation) through the Transformation Board. If the asset transfer meets the definition of a key decision, this will be progressed through a Council decision.

20. It also likely that when dealing with assets across such a broad Portfolio, a case-by-case basis will be required, and fluid decision making may be required from time-to-time. The Strategic Director for Corporate Resources and Transformation will ultimately oversee the process and will be required to use professional judgement where required in order deliver on the strategic actions.

### **Asset Disposal Policy**

21. This policy (**Appendix 2**) sets out the core principles, procedures and governance to be applied when considering land or property for disposal. Whilst the primary focus of this document is to provide key policy guidance for officers, elected members, businesses and the general public, it is important to note that each individual case will be assessed on its own merits and nothing in this document binds the Council into any particular course of action when dealing with the portfolio.

### **Community Asset Transfer Policy**

22. The principal aim of the Council's Community Asset Transfer Policy at **Appendix 3** is to ensure the efficient use of assets through community empowerment and minimise costs through retention or transformation.
23. The policy identifies the process and tools for the Council to follow when it considers the transfer of its buildings or land to different forms of community ownership. It will ensure the Council can work in a consistent and transparent manner when/if embarking on a community asset transfer.
24. Finally, it establishes the nature of the organisations to which the Council will consider an asset transfer, the basis of the transfer and how requests will be processed.

### **Corporate plan priorities**

25. The management of assets and accommodation is a key theme of Future New Forest, the council's transformation programme which underpins the delivery of the corporate plan priorities.

### **Options appraisal**

26. The Council could choose not to adopt the Strategic Asset Management Plan. This would mean that our aims for our property assets are not explicitly articulated in council strategy and policy and long-term actions would be taken forward in a less coordinated fashion.

## **Consultation undertaken**

27. The SAMP has been developed in consultation with EMT, the Transformation Board and the Finance and Corporate Resources Portfolio Holder.

## **Financial and resource implications**

28. During the setting of the 2025/26 budget, the Council resolved;

*'the principle of utilising up to £1.377 million of the budget equalisation reserve to fund investment in community assets, supporting the future transition to the new unitary authority and town and parish councils, is approved'.*

29. To deliver on the actions within the SAMP and accompanying policies, funding will be required to ensure the right resource is in place to manage the programme, to finance required surveys, and works emanating from them.
30. The Council previously resolved the placement of £1.5m into the 'Corporate Priorities Reserve', there to fund the then planned works across Appletree Court (to facilitate third party letting of part of the building). As this project is no longer proceeding, it is now proposed that this Corporate Priorities reserves be used instead to support the delivery of the SAMP, enabling the budget equalisation reserve to be used for other purposes, to be explored further during the budget setting cycle.

## **Legal implications**

31. The SAMP will support the Council to meet its statutory compliance and property management obligations and minimise the risk of harm to individuals as well as costs and reputational damage to the Council.
32. There will be legal implications arising as and when the Council looks to progress with any disposals. The Council's legal department will commission supplemental third-party expertise as required.

## **Risk assessment**

33. None

## **Environmental / Climate and nature implications**

34. Environmental implications are detailed within the body of the SAMP 2025-2028 document Appendix 1.

### **Equalities implications**

35. There are no immediate equalities implications arising from the SAMP. Any new decisions, policies or plans flowing from the action plan will be reviewed for any equalities impacts.

### **Crime and disorder implications**

36. There are no immediate equalities implications arising from the SAMP, although it is worth noting that the Council's deploys varying measures to ensure the security of its assets.

### **Data protection / Information governance / ICT implications**

37. None

### **New Forest National Park implications**

38. Some assets within the Council's Portfolio fall within the boundary of the National Park. The Council will always have due consideration to the purpose of the Parks Authority in the strategic management and review of its assets.

#### **Appendices:**

Appendix 1 – SAMP 2025-28  
Appendix 2 – Asset Disposal Policy  
Appendix 3 – Community Asset  
Transfer Policy

#### **Background Papers:**

Asset Investment Strategy

# Strategic Asset Management Plan

2025 - 2028

Estates and Valuation

June 2025

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# Asset management

## Executive summary

This Strategic Asset Management Plan 2025 – 2028 (SAMP) sets out what the council intends to do in the future to ensure property assets support corporate priorities.

Effective asset management is essential to meeting the council's priorities and improvement aims with asset rationalisation a key means of reducing costs and improving efficiency. Strategic use of land and property assets is a prerequisite for the achievement of key corporate priorities in relation to a clean and welcoming environment, supporting neighbourhoods and promoting inward investment and job creation.

The challenge facing all local authorities is that we must continue to deliver effective services with ever decreasing resources and competing demands. The financial constraints and uncertainty in the wider economy bring additional challenges.

In this context, it is essential that we take a strategic view of our portfolio, to deliver our corporate priorities and achieve the best value for money possible from all our assets.

The Strategic Asset Management Plan centres around the delivery of five pillars with interlinked objectives:

- Pillar 1: Digital asset management
- Pillar 2: Asset optimisation in support of corporate plan priorities
- Pillar 3: Working with partners and communities to promote efficient and effective service delivery
- Pillar 4: To reduce the environmental impact of council assets
- Pillar 5: To support economic growth, regeneration and prosperity.

In December 2024, the government published the **English Devolution White Paper**. This sets out plans to move power out of Westminster and back to local communities, ensuring that every part of England is covered by devolution.

We have been formally invited by the government to work with other councils in Hampshire and the Solent to develop a proposal for local government reorganisation (LGR). Taking this into account, the SAMP should be viewed as a key partner document for the LGR program in addition to our Corporate Plan 2024 - 2028. It also means we must be mindful of the LGR timeline, and the potential for key decision making of the Council to be somewhat restricted at some stage in the program.

## Introduction

Local authorities across the UK hold large real estate (assets made up of buildings and land) which have been acquired, inherited or gifted over many years.

It is recognised good practice for local authorities to produce a SAMP setting out their broad objectives for the management, development and rationalisation of their built and land asset base over a three-to-five-year period. Due to ongoing discussions in relation to devolution and LGR this SAMP covers a three-year period, 2025 - 2028.

Asset management provides a structured process to ensure value for money from property in serving the needs of the organisation. Property assets are expensive, in terms of both their capital value and annual maintenance and running costs. They need to be carefully managed over their lives to ensure best value through their use, maintenance and generation of income.

The SAMP sets out the council's approach to the strategic management of its General Fund land and buildings, outlining how our assets support our strategic priorities. The document also identifies the action required to develop these priorities further and contains proposals for improving the effectiveness and efficiency of the Council's property portfolio.

## Asset management framework

The SAMP is a suite of living documents, divided into three clear parts that can be updated separately to remain relevant.

To support this, the council has adopted a new asset management framework which has three core sections as follows:

1

The asset management strategy establishes:

- What the corporate approach or attitude is to property assets
- What we think our future should look like
- Where we want to be

2

The asset management action plan establishes:

- What we need to do to deliver our strategy
- The specific actions and prioritised focus areas

3

Policies and procedures

- To support delivery

## Aims and approach

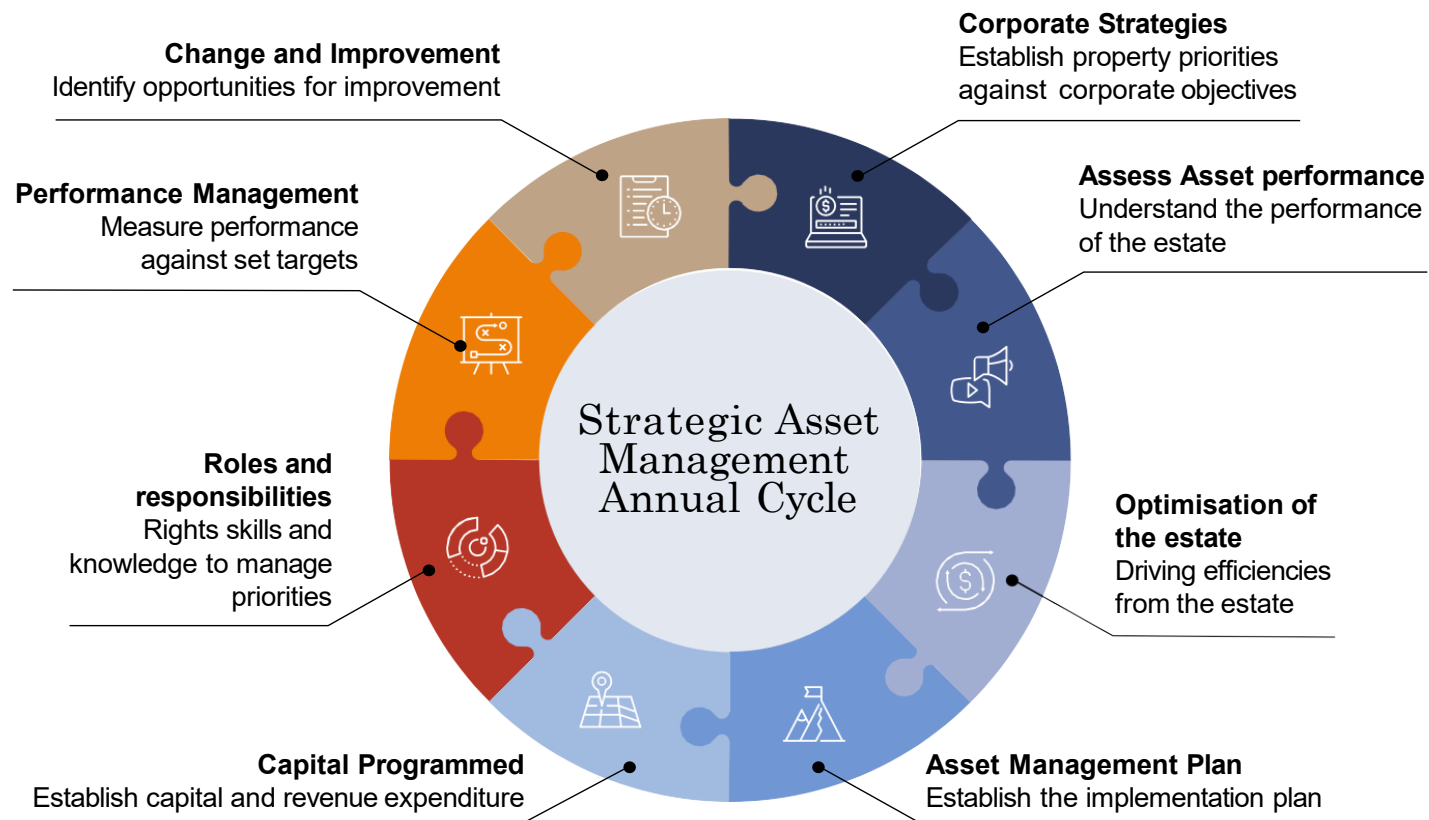
The aim of the SAMP, is to provide a framework for asset decision-making for the future use of our assets, enabling delivery to the organisation's way of working.

The document commits the council to managing its asset strategically.

In producing this SAMP, we will:

- Explain the framework in which the estate sits, including financial and portfolio summary
- Establish objectives for asset management
- Provide a programme of activity for the delivery of the objectives
- Set out a framework for an annual review of the 'state of the estate'

## Review process cycle



## Strategic pillars

The Strategic Asset Management Plan will provide an overview of our land and property estate (excluding Housing stock). Working within our five-pillar approach, we will focus areas for managing and developing the estate over the next three years. This will be supported by a suite of policies and procedures.

Effective management and ownership of a portfolio of assets will facilitate the future needs of the council services and functions within our financial means, whilst maximising opportunities for our residents, visitors and businesses.



## SAMP objectives

The SAMP provides a framework within which we can secure the operational and financial benefits of an estate which aspires to standards of best practice.

The objectives of the SAMP are:

- Establishing a corporate framework for the management of all our non-housing property assets
- Highlight our corporate priorities that deliver the best outcomes
- Articulate a vision for Council land and property assets over the next three years
- Set out a strategic approach in respect of the Council's land and property assets so the portfolio is managed as a whole rather than considering assets in isolation
- Support longer term regeneration and growth by preparing business cases for retaining, acquiring or disposing of assets ensuring best consideration is achieved and where relevant community and social value is taken into consideration
- Develop an approach that maximises income and works across the New Forest District as One Public Estate for efficiencies
- Ensure that to meet services objectives and Community needs, we have the right assets in the right location, in good condition and efficiently managed.

## Pillar objectives

In developing our strategic approach to our land and buildings, this policy includes certain actions and behaviours that we need to adopt, these are specific but also compliment the overall organisational values and behaviours.

### 1. Pillar one: Digital asset management

- To 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.
- To 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.

### 2. Pillar two: Asset optimisation in support of Corporate Plan priorities

- 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.

### 3. Pillar three: Working with partners and communities to promote efficient and effective service delivery

- 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.

4. Pillar four: To reduce the environmental impact of council assets

- Champion reduction in the environmental impact of occupation, use, travel and waste.
- Protect our climate, coast and natural world.
- 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

5. Pillar five: To support economic growth, regeneration and prosperity

- 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.

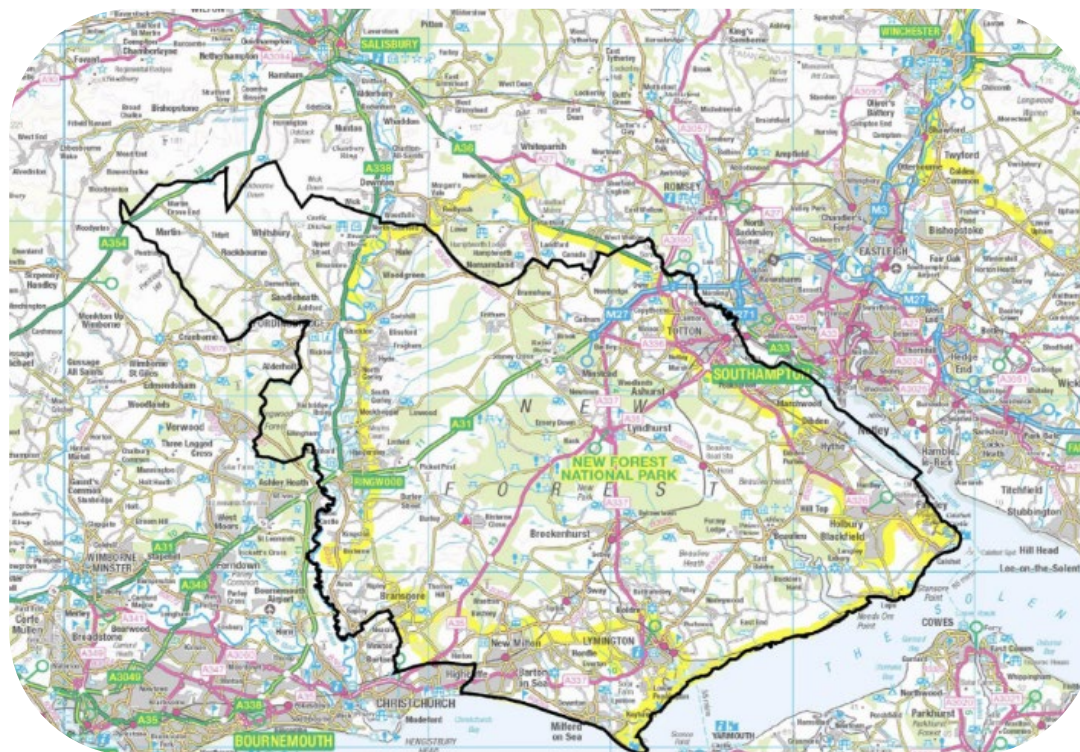
# New Forest district context and Corporate Plan 2024 - 2028

## About the New Forest district

The New Forest is the second most populated district authority in the southeast, with over 175,000 residents. It is home to the New Forest National Park which covers 75% of the land.

The New Forest is located within the county of Hampshire on the south coast of England positioned between Bournemouth, Wiltshire and Southampton. It is a vibrant and unique area known for its natural landscapes, ancient woodland, and 40 miles of stunning coastline. The New Forest National Park area covers 566km<sup>2</sup> (219 sq. mi) of the central area of the district making it the largest contiguous area of unsown vegetation in lowland Britain.

It is a working forest that has prospered for nearly 1,000 years. Many local practices are unique and date from historic times. This includes most significantly the depasturing of the iconic New Forest ponies, as well as cattle, pigs, and donkeys in the open forest by authorised landowners known as Commoners. These agricultural commoning practices are administered by the Verderers.



The largest settlements are Fordingbridge, Hythe, Lymington, Marchwood, New Milton, Ringwood, and Totton. Approximately 72% of residents live in urban areas, and 28% of residents live in rural areas.

It is home to an increasingly aging population with 30% of residents over the age of 65 compared to 19% nationally.

The average property price is just over £498,000 and around 74% of householders own their homes. Rental prices are high with the average monthly rent £125 higher than that for England.

Just over half of our residents of employment age are in full time employment.

30.4% of working people now state they work from home full time and around 2.2% of employment age residents claim unemployment benefit, representing a rise from previous years.

Around 30,100 people who live locally cross district boundaries to go to work with the main working areas being

- Southampton
- Bournemouth
- Test Valley

Approximately 22,500 workers travel inwardly from where they live to their employment within the district. Marine, hospitality and health and social care occupations make up some of the major industries.

Administrative occupations are the most common job type at 13.6%, Followed by corporate managers and directors at 12.0%, and customer service occupations make up 10.9%.

The area's largest employers include Exxon Mobil, Garmin, Paultons Park (home of Peppa Pig World), as well as public sector bodies including the NHS and us as the district council.

## Demographics

175,785 residents living within the district	Life expectancy is 83 years	51.9% of residents are female	48.1% of residents are male	96.8% of the population are White	1.3% of the population are Mixed Race	1.2% of the population are Asian or Asian British	0.4% of the population are Black or Black British	0.3% of the population are other ethnic groups	Average age in New Forest is 51.8 years	Average age in England is 40.
Median gross annual earnings are £34,647	The salary growth rate is 1.5% lower than England	51.8% of residents are employed	33.4% of residents are retired	18% have a disability which limits their day-to-day activities by a little or a lot						
Main language is English	0.2% of residents reported having poor English language skills									
We collect Council Tax from 83,380 properties	4th largest economy in Hampshire with £4.4 billion (GVA) generated in 2020 and circa 8,000 business enterprises									

Data sourced from: NOMIS ONS 2021 census data, ONS Local statistics, 2019 Index of Multiple Deprivation, New Forest Economic Profile 2022.

## Corporate Plan 2024 – 2028

To secure a better future by supporting opportunities for the people and communities we serve, protecting our unique and special place, and securing a vibrant and prosperous New Forest.

Our focus is on creating thriving and safe communities and a strong economy, providing homes, and supporting the most vulnerable, responding to the climate and nature emergency, and delivering excellent services that are future proof.

Our corporate plan priorities are designed to tackle these challenges head-on.

### People

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

- Priority 1: Helping those in our community with the greatest
- Priority 2: Empowering our residents to live healthy, connected and fulfilling lives
- Priority 3: Meeting housing needs.

### 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

- Priority 1: Shaping our place now and for future generations
- Priority 2: Protecting our climate, coast, and natural world
- Priority 3: Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way.

## Prosperity

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

- 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
- Priority 3: Championing skills and access to job opportunities.

## Future New Forest

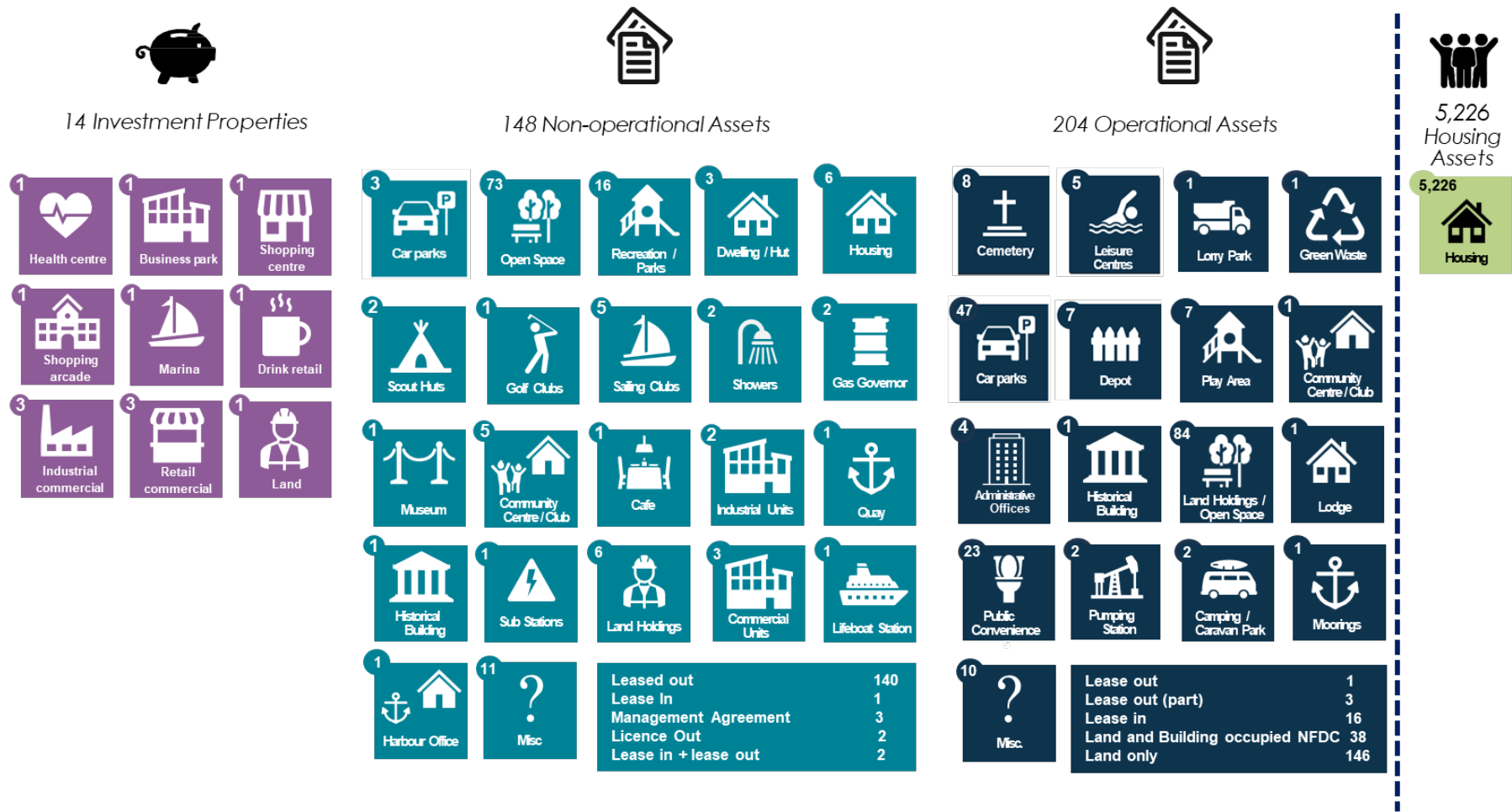
Underpinned by our transformation programme: Future New Forest. Investing in our people and services to meet customer needs, protecting the council's financial position, and embedding sustainability through our Future New Forest transformation programme.

- Priority 1: Putting our customers at the heart
- Priority 2: Being an employer of choice
- Priority 3: Being financially responsible
- Priority 4: Designing modern and innovative services.

# Portfolio overview

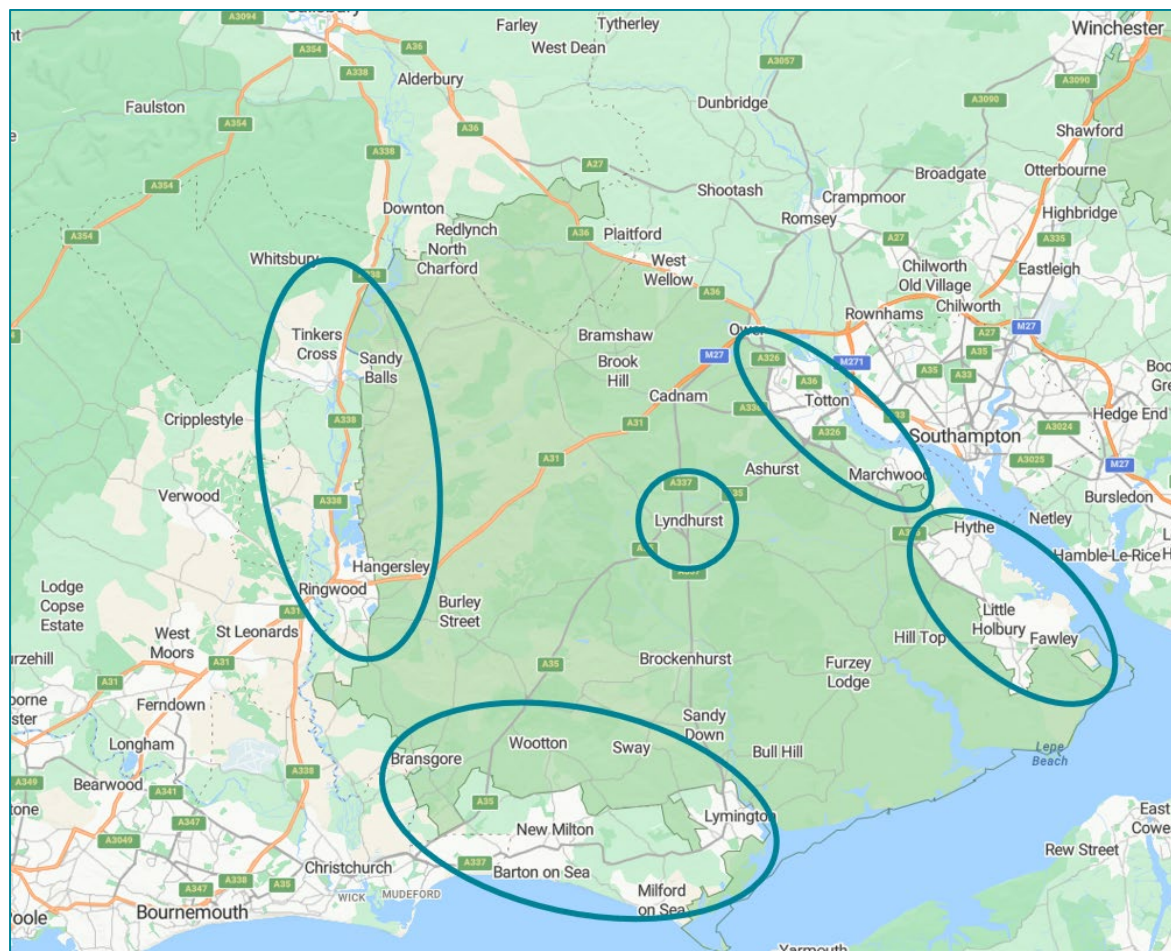
## Our assets by type

The Council’s General Fund accounts for a total of 366 assets. The non-operational assets are typically leased to 3<sup>rd</sup> parties to maintain and operate. In addition, NFDC hold the freehold on the land of c750 Beach Huts.





## Summary of the current portfolio



The heat map shows the geographic distribution of assets. It reveals four concentrated areas of assets and loosely resembles a hub and spoke distribution, with Lyndhurst in the centre of the district.



It is noted that geographic location of assets could be considered more of a strategic tool for the development of the appropriate service asset strategies and the council's overall operating model.

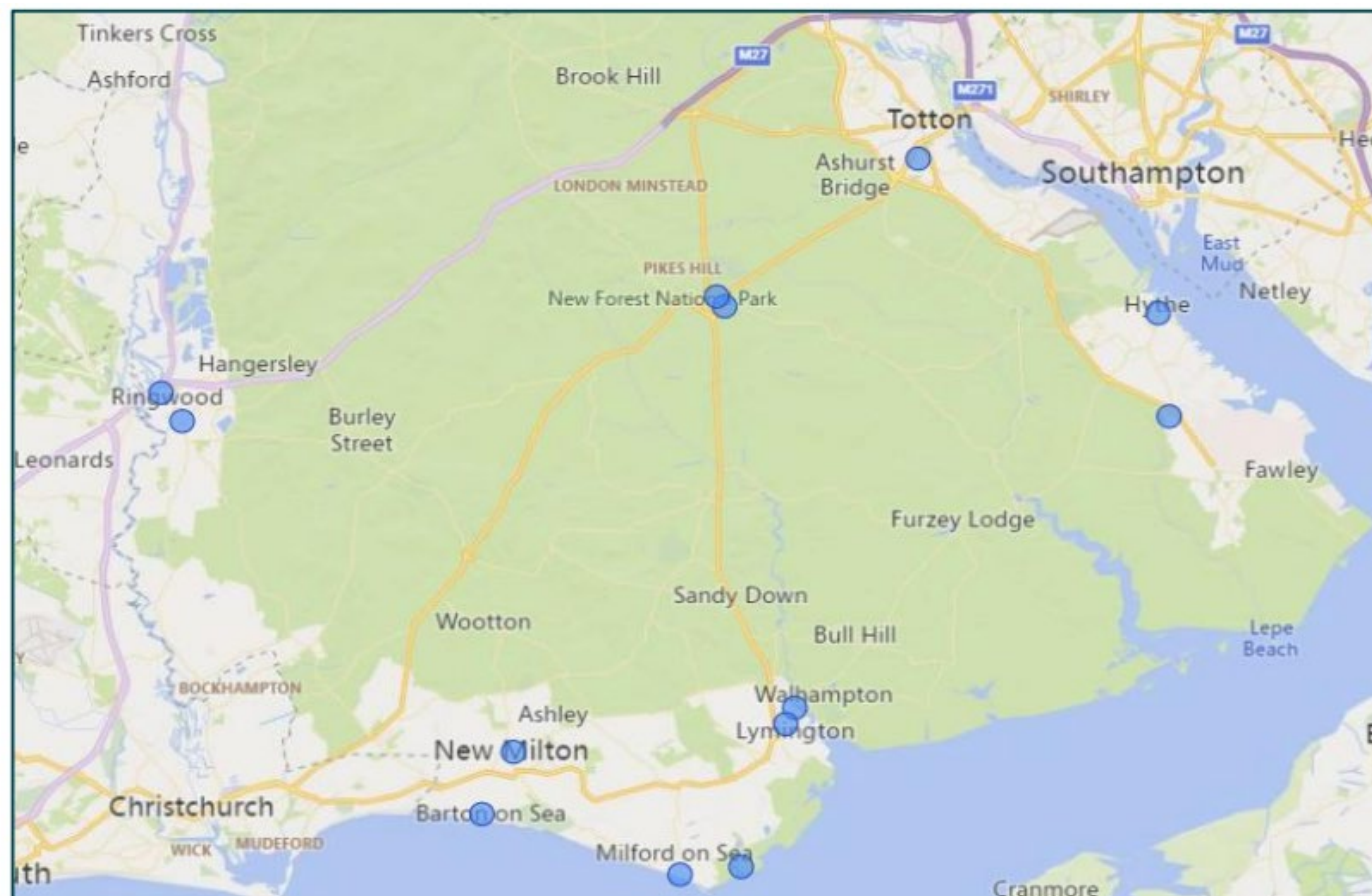
This map shows the locations of the operational estate, offices and depots. This geographic distribution may not reflect the service needs and demand. This will be highlighted via the Asset Challenge Framework.

## Assets by type

- Operational 204
  - Freehold 191
  - Leasehold 13
- Non-operational 148
  - Freehold 145
  - Leasehold 3
- Investment 14
- Overall value £107.4m

## Estate

- Footprint 770Hectares (Ha)
- Open space only 417Ha (Excluding foreshore)



## Commercial and investment portfolio

The investment assets or 'commercial portfolio' have been purchased mostly since 2018, in addition to 3 historical assets, by taking professional advice to obtain a balanced portfolio and reduce the risk of voids and loss of the capital investment. This was all initially financed through internal borrowing.

### Investment portfolio

The portfolio has been assembled to invest in the local business economy with a view to creating sustainable employment and other benefits to the district and its communities. Secondary to generate a return on the investments that make a significant contribution to the ongoing financing of council services, ensuring the financial sustainability of the council as government funding reduces.

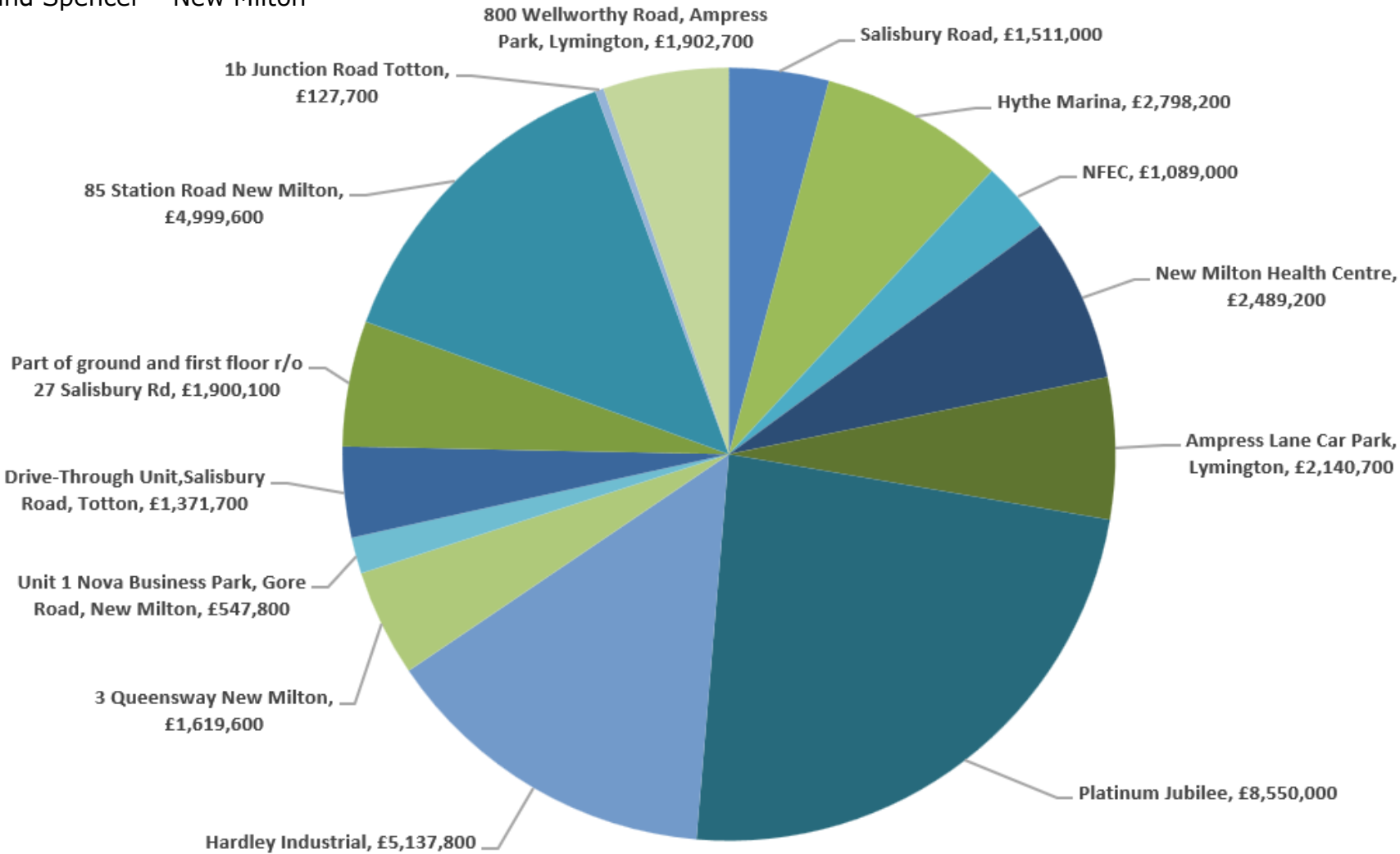
These assets can be reviewed to ensure that the return on investment is maximised and opportunities for development are actively explored to secure these returns in the medium to long term.

Where opportunities to acquire further investment properties occur, these will be explored, in line with the Councils Asset Investment Policy and subject to the relevant due diligence processes. Due to the current economic climate a decision was taken in 2023 to pause any future investment.

- Total assets 14
- Leases 56
- Gross income £1.84m
- Occupancy rate 91%
- Net book value £36.2m
- Yield 6%

Assets within the investment portfolio shown in the pie chart and include:

- Platinum Jubilee Business Park
- Hardley Industrial Estate
- Marks and Spencer – New Milton



## Commercial portfolio

The lease register shows there are 301 assets leased out. 167 of these generate income greater than £100 per annum. The remaining 134 are classed as peppercorn leases.

- Total leases 301
- Peppercorn leases 134
- Gross income £619k
- Occupancy rate 87.4%

## Appletree Holdings

Appletree Holdings are an arm's length group of companies. Wholly owned by NFDC, the remit is to invest in residential property and then letting to the private sector.

- Total assets 16
- Gross income £235k
- Net book value £5.1m
- Yield 4.61%

## Overview of Estates and Facilities management

NFDC's estate comprises of 366 property and land holdings, with a combined footprint of 770 hectares. These consist of operational, non-operational (commercial) and investment property portfolios.

The Council's Estates and Facilities Management function sits within the Corporate Resources & Transformation directorate.

Property holdings range from administrative office buildings, operational buildings situated in the community (such as community halls and public conveniences) and more complex operational sites (such as depots). They are held on a mixture of tenures, freehold (predominantly) and leasehold.

The Estates team is responsible for a variety of property matters. These include the management of the Council's non-domestic commercial and investment assets.

Activities include:

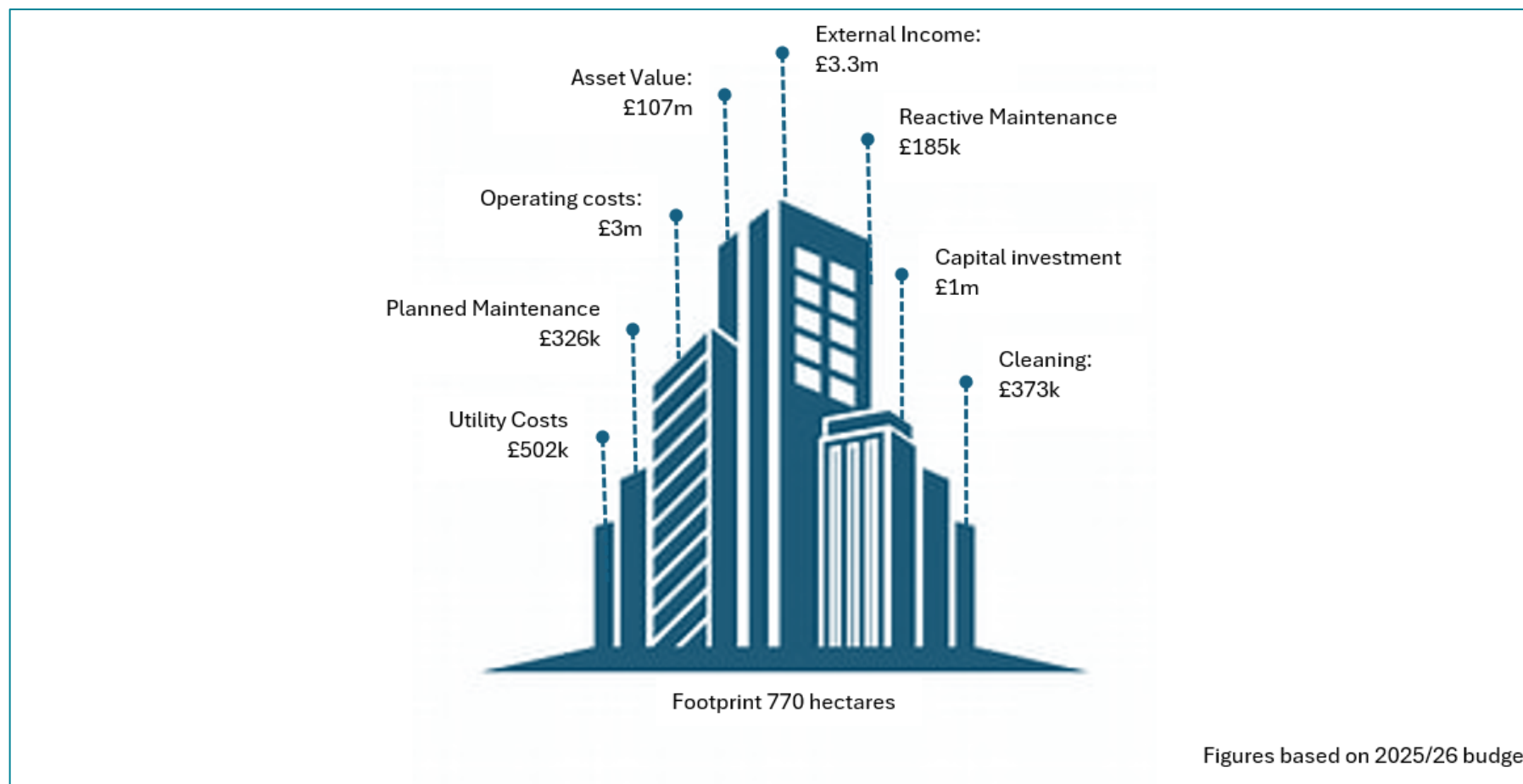
- Arranging asset valuations for all properties owned by the Council
- Ensuring a correct rates assessment of all the Council-owned properties
- Purchasing and selling Council properties and land
- Managing the leasing of properties owned by the Council and properties we lease from others
- Maintaining records of Council ownership

The Facilities Management team provides a range of property support services through a mix of in-house provision and outsourced contracted services. The team also rely on services to provide some low-level maintenance and housekeeping tasks, such as fire alarm testing and key holding at the depots.

Facilities Management oversight encompasses the management of buildings, infrastructure, and other facilities, as well as the services and processes required to keep them functioning effectively and efficiently.

Activities include:

- Planned and reactive works
- Building statutory compliance
- Property Management
- Cleaning services
- Energy management
- Space planning



Facilities Management have full budget control of 15 buildings with a responsibility for delivering planned and reactive works on a further 51 assets.

Alongside the management of the Council's property portfolio the function is responsible for the delivery of the FM related projects within the council's capital programme.



# Asset management strategy

## The strategy

Strategic Property Asset Management is the process which aligns business and property asset strategies, ensuring the optimisation of an organisation's property assets in a way which best supports its key business goals and objectives.

This strategy determines the high-level strategic framework for the effective management of our land and property portfolio (non-housing). It will guide decisions regarding the use of land and property assets ensuring that they support the optimisation of both financial and social value to meet the corporate objective of developing sustainable and resilient communities.

In all cases, assets will be aligned to delivering the Councils corporate priorities and must be maximised to ensure effective service, community or financial benefit. Financial conditions continue to be challenging, whilst customer expectations and demand is increasing.

In the development of the strategic asset management plan, the corporate plan has been reviewed to ensure that the SAMP priorities and corporate priorities align.

A high-level assessment of asset performance has been undertaken and the outcomes have assisted in developing the approach to ongoing estate reviews which will inform the SAMP.

Our Assets and Property are enablers which exist to meet corporate needs based on the council's priorities and service delivery requirements.

## The five pillars

The following five Pillars set out the council's approach to asset management, and guide future asset decision making. They reflect the role of Assets and Property as an enabler and demonstrate our ambitions to collaborate, rationalise, commercialise, decarbonise and innovate to contribute to the council's priorities and support delivery of council services.

The asset management strategy will be reviewed on a regular basis and evolve to ensure its relevance to the changing landscape within which NFDC operates. This is particularly important where there is evidence of underperforming assets or opportunities to drive further value from the estate.

### The five pillars



## Pillar one: Digital asset management

### SAMP objectives

1. 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.
2. 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

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

## Digital Asset Management

A strong and robust grasp of asset management data and property records underpins effective asset management, enabling the efficient evaluation and comparison of properties and land to support decision making and robust record keeping supporting estate management and compliance activities.

NFDC do not currently employ a single system or a single source of data, rather using up to 9 separate systems, including as an example spreadsheets and CIPFA Asset Management software.

A fit for purpose digital system containing up to date and accurate records inclusive of, helpdesk, planned and reactive works by building and full details of the council's investment and leased estate will provide “a single version of the truth”.

As such this system will be a fundamental foundation for property asset management and assurance via the introduction of a key performance dashboard.

This means that the system will be a single source of property records and data. The property function will invest in populating the system fully, maintaining the integrity of data records over time, and integrating the new system functionality into day-to-day operations.

Proactive maintenance monitoring and implementing planned condition surveys will inform asset strategy on the estate and would enable the council to make informed decisions on the future use, informed budget setting and investment requirements of its estate.

The condition survey's will address the essential and backlog maintenance needs of our remaining buildings – repairing mechanical and electrical (M&E) systems and prolonging their operational lifespan in the most cost-effective manner.

Working closely with individual council services we will develop and assist in the development of their service plans ensuring consideration is given to current and future asset requirements. Having a holistic overview will enable the council to challenge the use of assets through the asset challenge framework.

## Pillar two: Asset optimisation in support of Corporate Plan priorities

### SAMP objectives

1. 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.
2. To ensure ownership and occupation of assets is robustly challenged.
3. To ensure the Council's maintenance and refurbishment / renovation programme is fully informed and prioritised.

### Delivery mechanism

1. Challenge the use of the assets through an asset challenge framework.
2. 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.
3. Working with Services Areas in the development of their Service Plans to ensure consideration in relation to asset requirements.

### Asset optimisation approach

The Asset Management plan must consider the potential impact on profitability, investment return and staff, as well as the internal structural and managerial implications.

For the Estates and Facilities Management functions to perform a leadership role in the organisational transformation agenda and secure savings, we will develop a mature understanding of our property data and opportunities to optimise the estate.

To act as a mature strategic property function, we will adopt a robust estate optimisation process; first at a high level, then by drilling-down and assessing the opportunities in the assets. Furthermore, opportunities will be developed with varying degrees of change that can be adapted to suit New Forest District's needs. Estate optimisation is not just about cutting costs, but is about bringing material advantages to our residents, and ultimately enhancing the delivery of the corporate objectives and strategy. The process of estate optimisation aims to identify and prioritise those sub-portfolios that have the greatest potential to release savings.

Core data for each building within the NFDC's portfolio including running costs, value, condition and backlog maintenance, suitability assessments and future need ratings will be reviewed.

Considering the incomplete and fragmented nature of property data we will take a pragmatic view to identify and plug any gaps in data. Using this process, those portfolios with high revenue spend and/or those areas subject to significant business change can be identified and subjected to a more detailed analysis and opportunity assessment.

The process to undertake the estate optimisation as outlined in the diagram overleaf. The outcome of this review will include:

- financial analysis of the estate
- potential revenue impact and capital generation opportunities
- ranked by the potential impact (low/medium/high) and ease of implementation (quick/medium/long term)
- quick wins which would help release existing liabilities
- longer term initiatives which may substantially change the way the estate is managed
- recommendations and next steps for how the opportunities could be delivered
- The potential identification of assets that are suitable for potential disposal

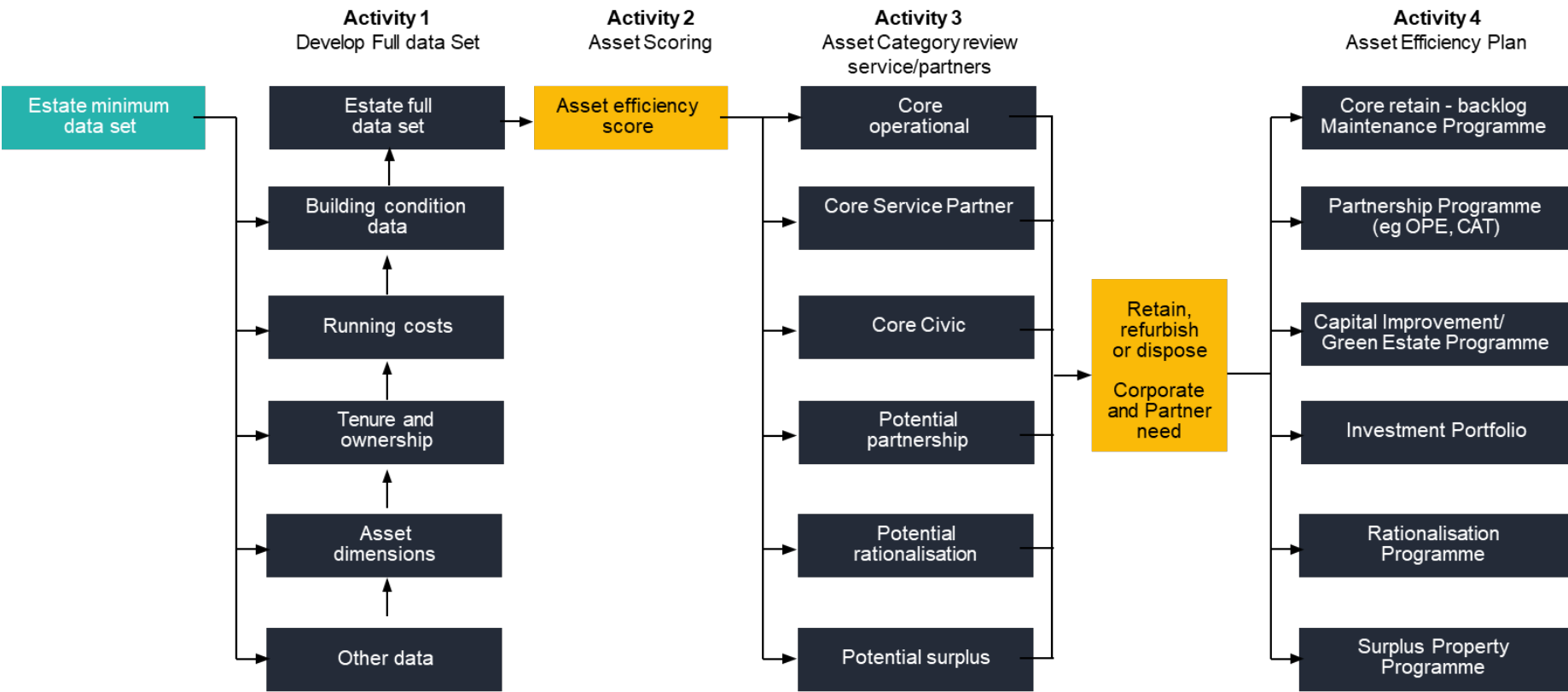
## The asset challenge framework

The Asset Challenge Framework is a process to continually review our asset portfolio on a continuous rolling programme, ensuring that only those assets needed or performing to acceptable levels are retained.

The ultimate aims of asset challenge is to reduce costs, identify assets to be retained for use and/or invested in and those that can be disposed of. Each asset will be assessed periodically using the asset challenge steps and outcomes recorded within the asset optimisation section of the SAMP framework.

Strategic purpose	Opportunities and risks	Performance appraisal	Options appraisal	Pre-implementation consultation	Outcome
<ul style="list-style-type: none"> <li>Why do we have the asset?</li> <li>What is its strategic purpose?</li> <li>Who is accountable for performance of it?</li> <li>What do we expect of it?</li> <li>Is this financial, non- financial or both?</li> </ul>	<ul style="list-style-type: none"> <li>Are there any opportunities that could be developed?</li> <li>Are there any blockages to exploiting these opportunities?</li> <li>Any there any risks to overcome?</li> </ul>	<ul style="list-style-type: none"> <li>What is the financial performance being delivered?</li> <li>Can non-financial benefits be quantified?</li> <li>What are the management costs?</li> <li>Are there any invisible costs?</li> </ul>	<ul style="list-style-type: none"> <li>Balance of performance opportunities and risks?</li> <li>What options are available?</li> <li>What are the relative costs and benefits of these options?</li> <li>Do any options present increased risks?</li> </ul>	<ul style="list-style-type: none"> <li>Internal stakeholders</li> <li>External stakeholders and partners</li> </ul>	<ul style="list-style-type: none"> <li>Retained</li> <li>Repurposed / Regenerated</li> <li>Recycled</li> <li>Disposed (Asset Transfer or Open Market)</li> </ul>

Estate optimisation model





## Pillar three: Working with partners and communities to promote efficient and effective service delivery

### SAMP objectives

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

### Delivery mechanism

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

### Partnerships – Working with Partners

The General Disposals Consent 2003 allows the Council to transfer the ownership and management of land and buildings they own to local communities at 'less than best consideration' (at less than full market value), where it can demonstrate the promotion of social, economic and environmental wellbeing support service integration, joint working and/or co-location.

## Community Asset Transfer

If following a review of an asset via the Asset Optimisation Framework it may be deemed that the asset can meet the above criteria and be suitable for a Community Asset Transfer (CAT).

The principal aim of the Council's CAT approach is to ensure the efficient use of assets through community empowerment and minimise costs through retention or transformation.

Any transfer will follow the published Community Asset Transfer Policy.

Transfer of an asset may enable greater access and simplification for suitable grants.

This does not prevent community organisations nominating an Asset of Community Value, which if meeting the recognised criteria could be placed on the relevant register.

The Council intends that suitable assets will be made available through the CAT process in a way that:

- Ensures compliance with legislation (e.g. Section 123 of the Local Government Act)
- Encourages community empowerment and pride
- Helps develop strong, cohesive and sustainable communities
- Reduces holding costs, risks and related liabilities
- Helps develop strong, cohesive and sustainable communities
- Demonstrates a fair and transparent process

## One Public Estate

One Public Estate (OPE) is a national programme, jointly managed by Cabinet Office and the Local Government Association, that brings public sector organisations together. It provides practical and technical support and funding to councils to deliver ambitious property focused programmes in collaboration with central government and other public sector partners (blue light services).

By working in partnership, we can look at how we can use our land and buildings collaboratively to:

- Improve public services to residents, visitors, employees and businesses in the county
- Renew and rationalise the public estate so there is a reduction in the amount of money we spend on buildings
- Free up much needed land for the development of housing, commercial and employment space
- Support local economic growth
- Generate capital receipts and income.

And it could include working with existing and developing partnerships with the likes of:

- Hampshire County Council
- Hampshire and the Isle of White Constabulary
- Hampshire Fire Service
- NHS
- RNLI

## Partnerships – Locations

The Local Asset Reviews have sought to maximise the efficiency of the wider public sector corporate asset base to provide an integrated facilities with improved service delivery for users, focused on:

- Place based co-ordination to build/develop integrated services, retail, leisure/culture within neighbourhoods/town centres
- Co-location with other partners
- Integrated service delivery partnership combining public and private expertise and resources
- Provide assets that are easily accessible to communities.



Example map plotting: Public Conveniences located within New Forest District boundaries.

Pillar four: To reduce the environmental impact of council assets

SAMP objectives

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

Delivery mechanism

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

## Environmental impact

The council has a climate and nature emergency action plan, targeting a significant reduction in carbon emissions from our buildings, external uses (i.e. street lighting) and transport fuel.

Carbon emissions from our buildings form the majority of council’s total operation emissions and therefore how we manage, maintain, refurbish, redevelop or dispose of our buildings has great significance to the achievement of these aims.

The council owns a number of buildings of significant age which were designed to be used with heating and plumbing systems which have long become obsolete. In addition to their energy inefficiency, some of these buildings represent a significant revenue drain in terms of repairs and energy costs.

In such instances therefore, the net zero and value-for-money agendas reinforce each other and may point towards either redevelopment or disposal of our buildings, although this will have to be assessed on a case-by-case basis via the Asset Challenge Framework.

The Council will lead by example for the benefit of our community.

Key Data	
CO2 Tonnage*	261 tons
Electricity	£303,500
Gas	£75,570
Water	£144,620
Total utility spend	£523,690
<i>*Electricity is procured as a renewable energy and is CO2 reporting exempt (205 Tons).</i>	

The SAMP will be a key enabler in helping to deliver against the Council's carbon Net Zero ambition by:

- Seeking to deliver sustainable MMC (modern methods construction) projects in line with reducing carbon footprint and utilising more brownfield sites.
- Ensure new assets meet Climate Emergency pledges wherever possible
- Proactively monitor and benchmark performance of the portfolio and identify efficiency opportunities.
- Further optimisation of Building Management Systems (BMS) across our estate.
- Proactively improving the EPC ratings of our asset portfolio.

#### What has been achieved to date

- Delivery of Hardley Depot to BREEAM Excellent Standards (final outcome pending)
- Externally funded installation of 2 x Air source heat pumps at Appletree Court.
- Secured Salex funding of up to £1.8M for the Installation of solar PV panels, air source heat pumps, window replacement and lighting upgrades over a 3-year period at Applemore Leisure Centre.
- Majority externally funded installation of 8 x EV charging points at Appletree Court.

## Pillar five: To support economic growth, regeneration and prosperity

### SAMP objectives

1. We will work with key partners to:
  - 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.
2. We will manage our commercial portfolio effectively, balancing regeneration needs, job creation and income generation.
3. We will continue to consider direct delivery of affordable housing

### Delivery mechanism

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



## Economic growth

The SAMP will support the District Council and wider business community across New Forest district by ensuring that Economic Development and Regeneration are embedded elements with the SAMP Objectives.

- Support long-term regeneration and growth of the district through strategic approach to development and management of Council's assets
- Ensure that wider regeneration and community benefits are derived from acquiring, developing and divesting assets
- Provide a framework and strategies for the development of assets for housing, transport, and parks
- Achieve wider regeneration benefits by sharing asset through one public estate initiative
- Contribute to the delivery sustainable housing growth by using Council's assets to control or shape developments with other sectors
- Support infrastructure and land assembly for regeneration projects
- Promote development sites for future growth
- Support the delivery of new developments and strategic needs
- Given scale of development needs look to assemble underused brownfield sites for commercial gain and better use of Council assets

### What has been achieved to date

- Delivery of Platinum Jubilee Business Park
- Refurbishment of Totton shopping arcade

## Priority projects

### Totton masterplan

The Council has also commissioned master planning work on Totton which will inform opportunities for regeneration including public realm, art and culture. Supporting businesses in part by way of an investment plan.

### The Solent Freeport

The Solent Freeport is a unique opportunity to bring sustainable economic growth to the NFDC district.

In particular, it provides the vehicle and focus to deliver the Council's Waterside visions, realising investment on sites of national significance.

Which includes several development sites giving businesses operating within the designated area access to tax benefits such as enhanced capital allowances. Forecasted benefits to the district include several thousand jobs and significant pooled retained business rates over 303ha of development land.

The Solent Freeport will:

- Be a hub for global trade and investment
- Promote regeneration and job creation
- Create hotbeds for innovation

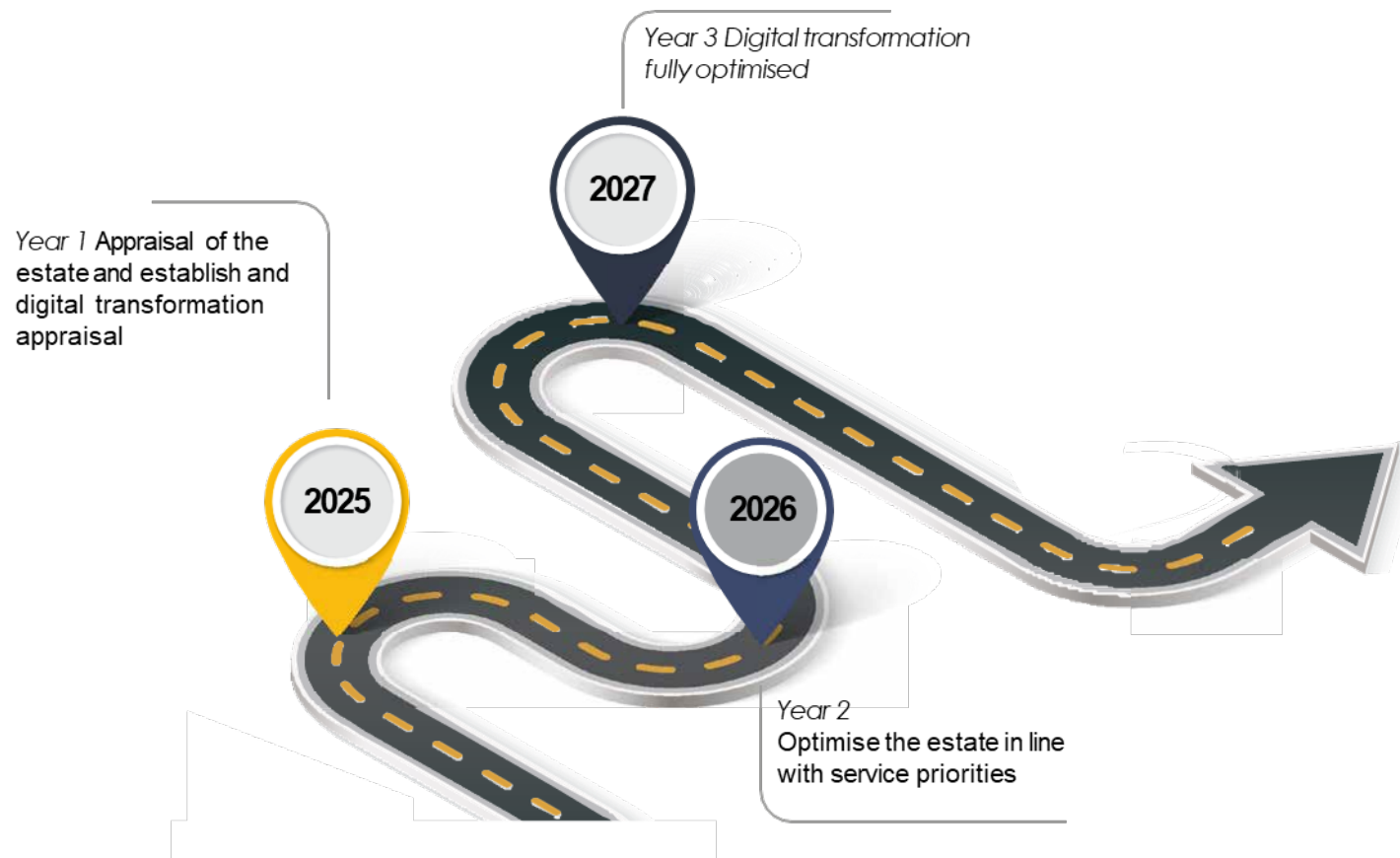
The Council should look to use existing assets to help support the delivery of the freeport such as providing mitigation land.



# Asset Management Action Plan 2025-2028

## SAMP Roadmap

To keep the asset management strategy relevant and aligned to changing corporate priorities, it will evolve over time. Each of the five pillars is supported by an Asset Management Action Plan with detailed objectives and actions.



## Five pillars headline plan

Pillar	Year 1	Year 2 - 3
Digital asset management	<ul style="list-style-type: none"> <li>Develop digital asset platform specification</li> <li>Digital systems market appraisal v inhouse solution</li> <li>Complete asset data refresh</li> <li>Introduce Key Performance Indicators</li> </ul>	<ul style="list-style-type: none"> <li>Estate optimisation development with service areas</li> <li>Establish core corporate programmes of work from estate optimisation</li> </ul>
Asset optimisation in support of corporate plan priorities	<ul style="list-style-type: none"> <li>Occupation and use of assets are reviewed, and asset framework challenge initialised</li> <li>Condition surveys and initial refurb / regen prioritisation undertaken</li> <li>Works underway for refurb / regen of initial prioritised assets</li> <li>Full lease review</li> </ul>	<ul style="list-style-type: none"> <li>Review and action plan for non-income generating non-operational assets</li> <li>Introduce measures to drive A low carbon public estate</li> <li>Maintenance programme underway according to prioritised schedule</li> </ul>
Working with partners and communities to promote efficient and effective service delivery	<ul style="list-style-type: none"> <li>Identify assets suitable for CAT</li> <li>Identify options for collaborative working with partners, including OPE</li> </ul>	<ul style="list-style-type: none"> <li>Progress 'quick-win' Community Asset Transfers (being mindful of LGR timeline and required governance)</li> </ul>
To reduce the environmental impact of council assets	<ul style="list-style-type: none"> <li>Define criteria for sustainability within portfolio</li> </ul>	<ul style="list-style-type: none"> <li>Embed energy efficient criteria to all projects</li> <li>Benchmark running costs of assets against the market</li> </ul>

	<ul style="list-style-type: none"> <li>• Optimise Building Management Control Systems</li> <li>• Identify avenues for additional green funding</li> </ul>	<ul style="list-style-type: none"> <li>• Deliver PSDS project</li> </ul>
To support economic growth, regeneration and prosperity	<ul style="list-style-type: none"> <li>• Totton Town Regeneration master planning</li> <li>• Continue engagement in Freeport</li> </ul>	<ul style="list-style-type: none"> <li>• Promotion of NFDC priorities within the Freeport program</li> </ul>

# Measuring success and performance

## Performance

Annually the priorities will be identified and appropriate performance measures applied. Each pillar will have specific key performance indicators with measurable targets.

Overall performance measures for this may include (but are not limited to):

### Appropriate data improvement relating to time, cost and quality

- Validation and quality of asset data
- Improvement in customer satisfaction results
- Continual process/procedure improvement based on feedback

### Assessment of asset performance

- Utilisation and improvement to operational requirement satisfaction
- Improvement in the rate of occupation of assets
- Improvement in appropriate financial target
- Reduction in operating costs

## Reduction in compliance and safety matters

- Compliance of the asset
- Time lost through assets not being adequately maintained
- Areas of risk to safety
- Energy performance
- Reactive vs Planned maintenance ratio
- Maintenance deficiency affecting service delivery
- Performance against budget

## Financial performance indicators for income and expenditure for the estate

- Returns that reflect risk exposure
- Asset utilisation
- Current cost of the estate
- Future cost of the estate
- Capital receipts realised against realistic targets

## Environmental performance targets

- Reduction in utility and energy usage

- Reduction in EPC
- Reduction in carbon emissions
- Percentage of land release
- Revenue savings

## Measures against targets appropriate to the regeneration projects

- Target delivery
- Use of s106 contributions measurement against outcomes



# Approach to governance

## Asset disposal governance

As part of the SAMP, land and property assets held by the council will be appraised and considered for disposal and potentially surplus to requirements if any of the following examples apply:

- The Asset Challenge Framework has been completed
- The Asset no longer makes a positive contribution to delivery of council services
- The revenue and capital demands to maintain far outweigh any income of financial or policy benefits
- Has no potential for future strategic regeneration and/or redevelopment purposes
- An alternative site can provide a more cost effective and efficient service
- No adopted and resourced council plan/policy/strategy, that could bring the asset into use in foreseeable future
- No potential advantageous shared use with partners (One Public estate/CAT)

The Council recognises that good governance is a key component of this strategy, so it is essential that all decisions to dispose of an asset must be subject to gateway approvals.

Each Gateway has clear owners and defined roles and responsibilities to progress matters and attain necessary approvals.

Full details are contained within the Asset Disposal Policy.

## Asset disposal governance matrix

Stage		Action	Responsible	Informed	Decision Point
1	Asset Challenge Framework	<ul style="list-style-type: none"> <li>Asset identified as surplus or underperforming. Potential better model of delivery</li> </ul>	Head of Estates and Facilities Management  Estates Manager	Strategic Director Corporate Resources & Transformation	
2	Internal Review	<ul style="list-style-type: none"> <li>Request Title Report, red line and terrier report to see if there any covenants, charitable land etc.</li> <li>Review details with transformation board</li> <li>Notification given to internal stakeholders of availability of asset</li> <li>What is the likely disposal timeframe?</li> <li>Is the asset suitable for community asset transfer. If “Yes” then consider potential CAT (follow CAT Policy)</li> </ul>	Legal	Service Manager  Transformation Board  Portfolio Holder  Ward Member	

		<ul style="list-style-type: none"> <li>If no suitable options prepare for disposal and place asset on surplus land/asset register</li> </ul>			
3	Preparation for Disposal – Capital Receipt	<ul style="list-style-type: none"> <li>Professional valuation (x 2 if &gt;£100k)</li> <li>Consult with Ward Members</li> <li>If Asset is an ‘Asset of Community Value’ then the community has 6 weeks to express an interest in buying</li> <li>Write Disposal Business Case paper for the disposal. To include scoring key decision scorecard</li> </ul>	Estates	Ward Member	Transformation Board
4	Approval to proceed with disposal	<ul style="list-style-type: none"> <li>Key decision if value &gt; £150k OR the asset covers multi-wards OR if high score is returned on key decision scorecard.</li> <li>Review Business Case Decision paper</li> <li>Agree any reserve valuation</li> </ul>	Strategic Director Corporate Resources & Transformation	Estates Ward Member	Transformation Board / Council
5	Property disposal	<ul style="list-style-type: none"> <li>Proceed with agreed disposal route</li> </ul>	Estates		

		<ul style="list-style-type: none"> <li>• If land is 'Open Space' then it will require additional steps outlined in the Disposal Policy</li> </ul>			
6	Evaluation and Council consultation	<ul style="list-style-type: none"> <li>• Review offers</li> <li>• Completion of Business Case Decision Paper with recommendations</li> <li>• Council consultation of submission/decision</li> <li>• Approve sale – depending on sale value and delegated level of authority.</li> </ul>	Estates Strategic Director Corporate Resources & Transformation		Transformation Board
7	Practical completion	<ul style="list-style-type: none"> <li>• Instructions to Legal preparing/completion of agreements</li> <li>• Receive Capital Receipt</li> </ul>	Legal		

## Community asset transfer governance

The community asset transfer (CAT) policy is a key enabler as part of the Council's Strategic Asset Management Plan (SAMP), ensuring property assets held by the council will be appraised and considered for use or transfer into the community.

The Council's portfolio of assets is varied in tenure and use and the pace of change in how the Council meets new and challenging service needs means the asset base must constantly evolve to respond to help improve and develop new delivery solutions.

The Council sees this challenge as an opportunity. There will be instances when Council owned community assets often used by VCOs (Voluntary or Community Organisation) are returned to the Council, become surplus to requirements, are functionally or economically obsolete or may have the opportunity of being more effectively run by the communities themselves. Further details are contained within the Community Asset Transfer Policy.

The principal aim of the Council's CAT is to ensure the efficient use of assets through community empowerment and also minimise costs through retention or transformation. The Council intends that suitable assets will be made available through the CAT process in a way that:

- Ensures compliance with legislation (e.g. Section 123 of the Local Government Act)
- Encourages community empowerment and pride
- Reduces holding costs, risks and related liabilities
- Demonstrates a fair and transparent process
- Helps develop strong, cohesive and sustainable communities
- Ensures sustainable CATs do not conflict with other community projects.

## Eligibility

Each organisation wishing to apply for CAT needs to meet the following criteria:

- Charitable or not-for-private-profit organisation
- Generate social, economic or environmental benefits which directly benefit the people of the New Forest District
- Benefit a wide and diverse a range of local people as possible
- Have the capacity and resources to manage the asset and have directors or committee members who have the necessary experience and skill

NOTE: We will continually make available assets available for transfer and provide a defined expression of interest form for interested parties to apply

## Community asset transfer governance matrix

Stage		Action	Responsible	Informed	Decision Point
1	Asset identification	<ul style="list-style-type: none"><li>• Potential CAT identified as part of the disposal process</li><li>• Preferred transfer route agreed. This could be an open marketed CAT or if better served by a singular organisation i.e. Town / Parish Council</li></ul>	Estates		

2	Preparation for CAT disposal	<ul style="list-style-type: none"> <li>Professional valuation (x 2 if &gt;£100k)</li> <li>Consult with Ward Members (20 working days)</li> <li>If Asset is an 'Asset of Community Value' then the community has 6 weeks to express an interest in the transfer</li> <li>Write Business Disposal Business Case paper for CAT</li> </ul>	Estates Strategic Director Corporate Resources & Transformation	Strategic Director Corporate Resources & Transformation Finance Portfolio Holder	
3	Approval to proceed with CAT	<ul style="list-style-type: none"> <li>Key decision if value &gt; £150k or the asset covers multi-wards. Or if a high score is returned on the CAT scorecard</li> <li>Review decision paper</li> <li>Agree any terms of transfer and route</li> </ul>	Strategic Director Corporate Resources & Transformation	Estates Ward Member	Transformation Board / Council
4	Expression of Interest	<ul style="list-style-type: none"> <li>Create information pack</li> <li>Advertise the opportunity (4 weeks) if applicable e.g. not for direct route freehold</li> <li>Receive informal enquiries</li> <li>Review and score informal expressions of interest</li> </ul>	Estates	Portfolio Holder Ward Member	

		<ul style="list-style-type: none"> <li>Selected organisations to submit business case</li> </ul>			
5	Formal Submissions of Interest/ Bids	<ul style="list-style-type: none"> <li>Inform organisation</li> <li>Receive formal enquiries</li> <li>Consult with Organisations</li> <li>Evaluation and scoring of bids</li> <li>Completion of Portfolio Holder Decision Paper with recommendations</li> <li>Council consultation of submission/decision</li> </ul>	Estates	Strategic Director Corporate Resources & Transformation Finance Portfolio Holder	Transformation Board
6	Evaluation and Council Consultation	<ul style="list-style-type: none"> <li>Presentation of business case and feasibility assessment by bidding organisation(s)</li> <li>Evaluation and scoring of bids</li> <li>Completion of Disposal Business Case Decision Paper with recommendations</li> <li>Council consultation of submission/decision</li> </ul>	Estates	Strategic Director Corporate Resources & Transformation Finance Portfolio Holder	
7	Practical Completion	<ul style="list-style-type: none"> <li>Instructions to Legal preparing/completion of agreements</li> </ul>	Legal		



8	Monitoring	<ul style="list-style-type: none"> <li>Monitoring arrangements post transfer</li> </ul>	Estates		
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## Asset investment / acquisition

The Council remains of the view that purchases of commercial properties and future development (including re-development of land or the repurposing of existing Council real estate) when made on a cautious and prudent basis will over time contribute to the Council's vision and priorities as set out in full in the Asset Investment Policy (which also outlines the governance arrangements in place).

Land and property interests should be considered for acquisition if the following circumstances apply:

- The acquisition will make a positive contribution to the current or future delivery of council services
- The acquisition has economical benefits in reducing occupational costs (revenue and capital)
- Asset meets minimum requirements of the Investment Policy
- The asset provides the opportunity promote or support economic activity with the New Forest District.
- To achieve the minimum evaluation requirement of yield, that is to ensure the income from the investment does not place an additional financial burden on the General Fund
- Option appraisal has been undertaken which highlights acquisition as the most economic and efficient means of service delivery, for council and wider public services
- The acquisition of the interest has potential for future strategic regeneration and/or redevelopment or contributes to wider corporate objectives and appropriate funding has been identified.

## Major development and capital project governance

A key principle of the 'Strategic Asset Management and Major Developments' delivery programme is to ensure the Councils capital investments are managed effectively through the adoption of a streamlined gateway review process that will ensure that:

- Money is well invested
- Proposals are thoroughly assessed and align with SAMP and Corporate objectives
- Projects and Programmes are delivered on time, to budget and quality
- Change is delivered to a high standard (efficiently and controlled)
- Benefits and project outcomes are clearly defined and tracked
- Projects have been through appropriate approval process at key defined stages (Can't pass through a gateway without necessary approval)
- Capital spend assessments are looked at quarterly to review the gross position, liability and risks to council and partners
- Communications are improved with clear accountability and responsibility matrix defined on all projects

The annual project 'bid' process as included within the budget preparation cycle, and the gateway stages as included within Contract Standing Orders provide the necessary governance to ensure rigorous program approval and delivery.

Appendix – Plan on a page



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# Asset Disposal Policy

## Estates, Valuation and Facilities

27<sup>th</sup> May 2025

Version number Version 3.0

Version	Author	Date	Changes made
Version 1	John Cooper	20/04/25	Initial document
Version 2	John cooper	14/05/25	Changes to format and order of the document
Version 3	John Cooper	27/05/25	Removal of Roles and Responsibilities section Consultation table inserted (Section 4.9) Addition of Key Decision scorecard (Appendix 5) Addition of Bid balanced scorecard (Appendix 6)

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# 1. Introduction

- 1.1 This policy sets out the core principles to be applied when considering land or property for disposal. Whilst the primary focus of this document is to provide key policy guidance for officers, elected members, businesses and the general public, it is important to note that each individual case will be assessed on its own merits and nothing in this document binds the Council into any particular course of action when dealing with the portfolio. Alternative methods of disposal, not specifically mentioned in this policy, may be used where appropriate and subject to obtaining proper authority.
- 1.2 The disposal or relinquishment of surplus or underperforming council land and property assets is a key part of New Forest District Council's ("the council") strategy to meet the aims outlined in its Corporate Plan 2024-2028 and also forms a key part of the Strategic Asset Management Plan (SAMP) which identifies how the use of assets will feed into the Corporate Plan.
- 1.3 A definition of an asset disposal for the purposes of this Policy includes the sale of a freehold interest, an assignment or grant of a lease for more than 7 years, and the granting of easements and options. Leases of less than 7 years or an assignment of a term with less than 7 years to run which are exempt from the statutory requirement to obtain best consideration, are outside of this policy, although in such cases there will be a general presumption that Officers will follow the policy's principles.
- 1.4 The policy document will ensure that a common, robust disposal and governance process is adopted in order to support effective property disposal decision making within the council and to ensure that requests to purchase council-owned assets are dealt with in a fair and consistent manner.
- 1.5 The policy is not intended to apply to leases where a tenant has a statutory right of renewal, or statutory easements and wayleaves granted to utility companies unless there is clear public interest in which case the Portfolio Holder for Corporate Resources will be consulted.
- 1.6 The aims of this policy are:
  - a) To set out procedures that council officers will follow when dealing with disposals, to ensure they are dealt with in a consistent and transparent way. There will be exceptional circumstances when officers may need to depart from the procedures set out in the Policy depending upon the circumstances of a disposal.
  - b) All actions recommended within this disposal policy document will strive to promote the disposal of assets in a way that positively supports the delivery of the council's Corporate Plan 2024-2028.



- c) To enable actual and latent capital value tied up in potentially surplus assets to be realised.
- d) To eliminate / minimising future liabilities through the disposal of non core assets.
- e) To maximise the proceeds or land use benefit from disposals for the benefit of the council and its community.

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## 2. The Legislative and regulatory context

- 2.1 A Local Authority may dispose of land it owns as it wishes; however, any disposal is subject to compliance with certain statutory provisions. Section 123 Local Government Act 1972 ('s123') imposes the overriding duty to obtain the best consideration that can reasonably be obtained for relevant disposals of land.
- 2.2 For the purposes of Section 123, a disposal includes the sale of a freehold, granting a lease, assigning any unexpired term of a lease and the grant of an easement. It may also extend to the grant of an option to purchase a freehold or to take a lease. Section 123 does not apply to the grant of a short-term tenancy of less than 7 years or an assignment of an existing term with no more than 7 years to run.
- 2.3 The Local Government Act 1972 general disposal consent (England) 2003 provides a mechanism for Local Authorities to proceed with disposals at an undervalue, without the need for specific consent from the Secretary of State, subject to conditions. Examples may include those where the local authority considers that such disposal will help to secure the promotion or improvement of the economic, social or environmental well-being of its area; although this should not be considered an overriding factor.
- 2.4 The general consent is subject to a condition that the undervalue does not exceed £2 million. The undervalue is calculated by assessing the difference between the market value of the land or property (known as the unrestricted value) and the actual consideration received. If the under-value exceeds £2 million or the authority considers for any other reason that the general consent cannot be applied to the disposal, then specific consent from the Secretary of State must be obtained for the disposal to proceed.
- 2.5 Open Space: Section 10 of the Open Spaces Act 1906 states: "A local authority who have acquired any estate or interest or control over any open space or burial ground under this Act shall, subject to any conditions under which the estate, interest or control was acquired:
  - (a) hold and administer the open space or burial ground in trust to allow, and with a view to, the enjoyment thereof by the public as an open space within the meaning of this Act and under proper control and regulation and for no other purpose; and
  - (b) maintain and keep the open space or burial ground in a good and decent state..."
- 2.6 The provisions regarding the disposal of Common Land require consent from the Secretary of State and replacement land to be made available where the area of land to be sold exceeds 200m<sup>2</sup>.

- 2.7 European Commission Communication on State Aid elements in sales of land and buildings by public authorities (97/C 209/03) – also known as the 'State Aid Rules'.
- 2.8 RICS Valuation – Professional Standards 2019 UK VPGA 17 – Local authority disposal for less than best consideration. (updated Jan 2019)
- 2.9 Crichton Rules - In 2015 the Department for Communities and Local Government updated a circular entitled "Compulsory Purchase and the Crichton Down Rules" which prescribed the way in which all Government departments and executive agencies that are subject to a power of direction from a Minister must manage the disposal of land previously acquired by the use of compulsory powers. Local authorities, which are not subject to a ministerial power of direction, are not subject to such a prescription but are still recommended to also follow the rules.
- 2.10 In particular the General Rule of these guidelines states that "where a department wishes to dispose of land to which the Rules apply, former owners will, as a general rule, be given the first opportunity to repurchase the land previously in their ownership, provided that its character has not materially changed since acquisition." Disposals to former owners under these arrangements will be at current market value.

## 3. Definitions

- 3.1 **Common Land:** is land subject to rights enjoyed by one or more persons to take or use part of a piece of land or of the produce of a piece of land which is owned by someone else – these rights are referred to as 'rights of common'. Those entitled to exercise such rights were called commoners.
- 3.2 **Community Asset Transfer:** The transfer of an interest in property and or land from the council to a community group, or Town or Parish Council to secure community benefits.
- 3.3 **Disposal:** For the purposes of this policy, a disposal of property is considered to be a disposal if it consists of the transfer of the freehold interest or the surrender, assignment of a leasehold interest held by the council.
- 3.4 **Freehold:** means to own a property, including the land it's built on, with no fixed time limit.
- 3.5 **Leasehold:** is a property that you own for a fixed length of time. The land that the property sits on is usually owned by the freeholder.
- 3.6 **One Public Estate (OPE):** is a national programme that supports locally-led partnerships of public sector bodies to collaborate around their public service delivery strategies and estate needs. The programme is jointly managed by Cabinet Office and the Local Government Association. The aim of the programme is to help partners to repurpose surplus public estate for housing, regeneration, and other locally determined uses.
- 3.7 **Open Space:** is defined in the Town and Country Planning Act 1990 as any land 'laid out as a public garden, or used for the purposes of public recreation, or land which is a disused burial ground'. It is generally considered to be a valuable community resource, to be enjoyed by the wider community and there will be a general presumption against the disposal of these assets.
- 3.8 **Royal Institute of Chartered Surveyors (RICS):** Is the official body of property professionals that issues and monitor the standards of a chartered surveyor. All RICS accredited surveyors must pass a thorough process before they receive their chartered status.
- 3.9 **Strategic Asset Management Plan (SAMP):** is a documented statement of intent and planning tool. It specifies how the Council's objectives are to be converted into asset management objectives and describes the approach for achieving those objectives.

## 4. Main body

### 4.1 Overview

4.1.1 The council owns many properties ranging in type and size with a portfolio including offices, shops, and leisure and community centres as well as parcels of land such as parks and amenity space.

4.1.2 The council utilises its property in several ways, including:

- Operational accommodation for corporate use.
- The provision of residents' health and wellbeing facilities through managed leisure centres and swimming pools, outdoor sports pitches and parkland and nature reserve facilities.
- Encouragement of economic development in the district through the provision of commercial property to let, resulting in subsequent income generation.
- Car parks provided to ensure a joined-up approach to traffic management, strategic planning, and economic development.
- The provision of community space for community events and club meetings, exercise classes, children's parties, and community meetings.
- The holding of property as an investment to produce an income.

4.1.3 As part of its SAMP, the Council will ongoingly review the purpose, value and condition of its assets and consider whether a business case for disposing of an asset should be explored. The decision-making process will be informed by its Asset Challenge Framework (**Appendix 1**) that will enable officers to consider the relative value of assets within its portfolio, considering financial value alongside operational, environmental, social, economic and community values. The process may include assets that are no longer needed by the Council, are unaffordable to repair, or that are unlikely to be required for any future use. Alternatively, the Council may consider assets that provide a benefit that is disproportionate to the opportunity cost of capital tied up in the asset.

4.1.4 The Disposal policy is a key enabler as part of the Council's Strategic Asset Management Plan (SAMP), ensuring property assets held by the council will be appraised and considered for disposal and potentially surplus to requirements. Furthermore, assets may be deemed surplus to the Council's requirement following the policy principles.

- The asset no longer makes a positive contribution to delivery of council services
- The revenue and capital demands to maintain far outweigh any income, financial or policy benefits

- Has no potential for future strategic regeneration and/or redevelopment purposes
- An alternative site can provide a more cost effective and efficient service
- No adopted and resourced Council plan/policy/ strategy, that could bring the asset into use in foreseeable future
- No potential advantageous shared use with partners (One Public estate/CAT)
- The asset does not contribute towards the Council's commitment to delivering and maintaining a zero-carbon, energy efficient estate.
- The property or land is surplus to operational requirements and if sold would therefore contribute to the Council's financial sustainability

4.1.5 It should be noted that some land or property assets which meet the 'surplus' or 'underperforming' criteria may still be held by the council with the aim of enabling long term development or future infrastructure projects, as part of wider strategic regeneration or place shaping. Further, some property disposals may be compulsory transfers driven by statute rather than the identification of surplus or underperforming assets.

4.1.6 Once confirmed as surplus and a prospect for disposal via the Asset Challenge Framework, the property should be logged on the council's surplus land register.

4.1.7 The Estates team also receives a number of requests to purchase small parcels of land for use either as an example, gardens or for parking purposes the process for dealing with these is set out in **Appendix 2**.

## 4.2 Definition of A Disposal

4.2.1 For the purposes of this policy, a disposal of property is considered to be a disposal if it consists of the transfer of the freehold interest or the surrender, assignment of a leasehold interest held by the council.

4.2.2 In respect of the grant of new leases these will not be considered to be a disposal (but they will be de-recognised from the council's fixed assets and added to long-term debtors in the balance sheet) where the following applies: -

- The grant of leases to community groups charities or other organisations where the primary objective is the provision of a service to the community.
- In respect of properties held at least partially for investment purposes unless it is for an unbroken lease term in excess of 25 years

## 4.3 Governance

4.3.1 The Council recognises that good governance is a key component of this policy. The below table details the various stages, actions required and responsible person(s). Note these can also run concurrently.

Stage	Action	Responsible Person(s)	Informed	Decision Point
Stage 1	Asset Challenge Framework	Head of Estates and FM Estates Manager	Strategic Director Corporate Resources & Transformation	
Stage 2	Internal Review	Legal	Service Manager Transformation Board Portfolio Holder Ward Member	
Stage 3	Preparation for Disposal – Capital Receipt	Estates	Ward Member	Transformation Board
Stage 4	Approval to proceed with disposal	Strategic Director Corporate Resources & Transformation	Estates Ward Member	Transformation Board / Council
Stage 5	Property Disposal	Estates		
Stage 6	Evaluation and Council Consultation	Estates  Strategic Director Corporate Resources & Transformation		Transformation Board
Stage 7	Practical completion	Legal		

## 4.4 Internal Review

- 4.4.1 Once confirmed on the surplus land register the asset should then be internally reviewed and shared with the Transformation Board.
- 4.4.2 The council's Legal department should be engaged at an early stage to produce a report on title for the asset to be disposed of, to include any rights or obligations which might affect it. Consideration should also be given as to whether there is an obligation to offer the land back to a former owner under the Crichel Down Rules (see **Appendix 4 – Crichel Down Rules**) or whether the property has been the subject of funding in the past, which requires the repayment of grant monies.
- 4.4.3 The title report may highlight any restrictions in relation to future use or disposal routes for the asset. These will need to be considered and evaluated prior to proceeding further with any disposal.
- 4.4.4 Reasons to consider disposal of an asset via Community Asset Transfer may include:
- Supporting the third-party organisation to continue delivery of a key activity for residents when the transfer will allow the organisation to bid for and secure funds and/or to support a more sustainable business model.
  - Supporting the third-party organisation to deliver a specific service in line with the council's objectives where the service can best be provided through a council-owned asset.
  - Protecting a heritage or otherwise important council asset that may fall into disrepair if stewardship is not provided by a third sector organisation.
  - When a Town Parish/Council or third-party organisation is considered to be best placed to provide an alternative delivery model for an existing council service from an existing council-owned asset.
- 4.4.5 If the asset is suitable for Community Asset Transfer, then the Community Asset process should be considered.
- 4.4.6 Estates should seek to inspect the site in order to assess any development potential and any matter, such as on-site physical constraints, that is likely to materially affect the disposal. In addition, and where relevant, building condition surveys, health and safety certification and Environmental Performance Certificates should be collated (through Facilities Management/Property helpdesk) and the VAT position should be established (through Finance).

## 4.5 Preparation for Disposal

- 4.5.1 Before deciding whether to formally dispose of land or property, a business case decision paper setting out all relevant information should be produced.



- 4.5.2 An internal or external valuation should be completed by a RICS registered valuer early within the process. Where an asset is likely to be valued at more than £100,000 two valuations will be required one of which will be external. There may be some instances where an offer may be accepted conditional on a satisfactory valuation being obtained.
- 4.5.3 Where development potential has been identified, engagement with the council's Planning department should be made in order to establish the authorised use of the property and what potential alternative uses might be considered in order to assess the means by which maximum sale proceeds can be generated.
- 4.5.4 Where the council wishes to ensure a desired use of the property to achieve its policy objectives, it will be necessary to introduce absolute user clauses (in leases) and restrictive covenants (for sales) where appropriate. Overage and clawback provisions might also be considered, in order that the council might share in the benefits of any future increase in value due to a more alternative planning consent being secured by the purchaser of any property.
- 4.5.5 There is a need for continual liaison/communication with all stakeholders between a property being declared surplus and the completion of a disposal. In particular, the party responsible for the day-to-day management of the property is to be kept regularly informed of developments to an agreed timescale.
- 4.5.6 The council should, in most cases, seek to obtain the best consideration by the most appropriate method of disposal. To protect the council's interest in the event of subsequent (onward) sales, it should include where appropriate, the right for the council to have a 'first call' on the property in the event of a proposed subsequent sale (to be based on the council paying no more than the original transfer amount). As well as the clawback or overage clauses and restrictive covenants mentioned earlier, ransom strip retention or user rights may also be introduced where relevant.
- 4.5.7 Where a property is deemed unsuitable or unviable for use by either a partner organisation or the local community, then the council should proceed to market disposal following the due authority process.

## 4.6 Disposal Business Case

- 5.6.1 The Council recognises that good governance is a key component of this Policy, so it is essential that all decisions to dispose of an asset must be subject to a full business case report that will include a minimum set of requirements, including:

- The financial case for a disposal - this must show holding costs and potential savings and any loss in rental income.
- Proposed timing of the disposal - likely marketing and due diligence/legal work prior to exchange. Any conditional sales should include estimated timelines and longstop dates for planning etc.
- Method of disposal – this will be chosen to reflect the nature of the property and consider the best way to maximise value and minimise holding costs.
- Impact[s] risks of the disposal – financial, reputational, political, operational, etc.
- Evidence of an independent valuation to show that best consideration is guaranteed. This must be obtained from an RICS qualified Registered Valuer. On occasion this may be provided by a suitably qualified internal surveyor but will normally be provided externally.
- A market assessment by a suitably qualified agent.
- Options Appraisal – which covers all options considered.
- Estimated cost of sales and any budgetary approval required. This will include any legal, agents and cost of specialist reports, marketing material etc.
- Confirmation of deliverability of sale – where required. For example, if staff, public or other consultations are required, and the likely timescales.

## 4.7 Approval To Proceed with Disposal

- 4.7.1 Dependant on set criteria the delegated authority to approve the business case and disposal will be assessed on a case-by-case basis
- 4.7.2 A copy of the Key Decision Scorecard (**Appendix 5**) should completed and be included in any disposal business case. This will determine the delegated authority route for the approval of disposal.

### Minor Disposal

- 4.7.3 A minor disposal will include land parcels and value of less than £10,000
- 4.7.4 A minor disposal can be authorised by the Strategic Director Corporate Resources & Transformation

### General Disposal

- 4.7.5 This covers asset value between £10,000 and £149,999 and covers 1 ward.
- 4.7.6 A General disposal can be authorised by

## Key Decision Disposal

4.7.7 A key decision will be required if the following criteria is met

- The value of the asset is greater than £150k
- The asset covers more than one ward

4.7.8 A key decision will be authorised by

## 4.8 Methods of Disposal

4.8.1 A key consideration when seeking the appropriate authority to dispose of an asset is its method of disposal. The methods of sale generally adopted are set out below but these are not exhaustive, and alternative methods which are not listed below may be used to deal with unusual disposals.

4.8.2 All land and property assets which are released for disposal will be fully marketed except for disposals to nominated and special purchasers (see below), which will be sold by private treaty negotiation.

BASIS	METHOD	When to adopt
<b>Open market</b>	Private Treaty	Limited interest and narrow valuation band. The most common form of concluding a sale and one used for all types of properties mainly as it affords the seller the greatest degree of flexibility and time. Can have a closing date and by progress by the way of informal tender where considerable interest is shown during marketing
	Auction	Wide interest anticipated, no obvious purchaser and easy to allocate a reserve. Speed and best price can be demonstrated. Effectively promotes an immediate sale.  Often appropriate for residential assets not suitable for third party lending, land sales where there is limited prospect of development or alternative use and commercial property investments.  Requires 'up front' authority to allow setting of appropriate reserve and may result in no sale if reserve is not met.
	Formal Tender	Wide interest, land ownership not complex, no uncertainties regarding the grant of planning consent and any obligations that are to be placed on a purchaser are clear and capable of specification in advance.

		Not commonly used due to its complex nature and the rigid structure of the formal tender process.
	Informal Tender	<p>To identify a preferred bidder and enable further detailed terms or proposals for development to be negotiated.</p> <p>Appropriate for sales where there are uncertainties (particularly planning) and for large or complex development or regeneration sites and where the proposal may need to be developed in co-operation with the council to achieve best consideration.</p> <p>Allows for the use of conditional contracts, including clauses which allow for further sums to become payable (clawback) upon the grant of planning in the future or improvement in market conditions (overage).</p>
<b>Special purchaser</b>		<p>Sale to adjoining owner where special circumstances prevail.</p> <p>Typical examples include a conditional disposal where the council is selling for a particular purpose (i.e., to a developer for regeneration or to a nominated housing association for social housing development) or where there is a small area in size and value and the adjoining or locally located landowner is the only potential or likely purchaser (e.g., for garden extension).</p>
		<p>Sale to former owners under the Crichel Down Rules.</p> <p>See <b>Appendix 4 – Crichel Down Rules.</b></p>

- 4.8.3 Until a legally binding contract has been entered into, the council has a duty to consider any late offers or bids. This should be made clear to any prospective purchaser when disposing of land by private sale or negotiated/informal tender. In considering late bids, the council should take into account the likelihood of the late bid proceeding to completion in a timely manner and the possibility of it being used as a spoiling or delaying tactic, and the council may reject bids for sound commercial reasons such as these. In cases where the council does not wish to exercise any control over the future use of the property, other than through the planning process, then the disposal of the freehold will obtain the best price. However, where the council wants to exercise some control of the future use of the land, a leasehold disposal for a term necessary to ensure the satisfactory completion of the scheme is usually required.
- 4.8.4 In the case of the latter, these are often highly complex agreements and a development agreement will usually be entered into before a formal disposal is concluded – plus, in many instances, a Section 106 Agreement (setting out conditions and contributions to the community through the planning system). Major regeneration disposals are now more commonly negotiated by dedicated teams of valuation, finance and legal professionals representing local authorities, it is recommended that the property disposal and S106 Agreement are negotiated in tandem by appropriate private sector specialists for these types of disposals, in order to maximise the benefits to the council.

## 4.9 Consultation

- 4.9.1 The following consultation will be required during the Disposal process

Consult With	Comment	Length of Time
<b>Ward Members</b>	<ul style="list-style-type: none"> <li>During the disposal preparation stages. This is to gauge feedback for the disposal. This feedback will be included in the disposal business case</li> <li>Before disposing of surplus land or property and the release or variation of restrictive covenants</li> <li>As part of the process for advertising the disposal of 'public open space'</li> <li>Before submitting planning applications on Council owned land</li> <li>Before a report goes to Cabinet or Cabinet Committee / Transformation Board – Assets on land and property within their Ward</li> <li></li> </ul>	20 days
<b>Portfolio Holder</b>	<ul style="list-style-type: none"> <li>During the preparation and disposal stages. This is to gauge feedback for the disposal. This feedback will be included in the disposal business case</li> </ul>	
<b>Community</b>	<ul style="list-style-type: none"> <li>If the asset is registered as an asset of community value. The Community has the right to raise finance, develop a plan and make a bid to acquire the asset</li> </ul>	6 months

<b>General Public</b>	<ul style="list-style-type: none"> <li>If the asset is available for open market. This needs advertising</li> </ul>	4 weeks

## 4.10 Property Disposal

5.10.1 An appropriate marketing strategy will be developed for use by either the inhouse Estates team or external agents undertaking the disposal, with all costs (legal, consultants, marketing, and agency fees) being charged against the receipt.

5.10.2 Marketing materials will be produced in draft form whether inhouse or by the appointed disposal agent the latter for approval by the Estates Manager and arrangements made for the erection of a 'For Sale' board where appropriate.

5.10.3 Where formal sales particulars are prepared these will be forwarded, as a minimum, to:

- Relevant ward members
- Be posted on the council website page
- Any relevant potential buyers whose interest is registered on the 'Disposal Enquiries Register'
- The relevant town or parish council clerk.

5.10.4 This list is not exhaustive, and the relevant member of the Estates team will determine other appropriate recipients on a case-by-case basis to ensure as broad exposure as possible.

5.10.5 Consideration should be given to advertising the availability of the property on social media and the local press/property websites.

5.10.6 All negotiations for disposal should be conducted by a suitably qualified property professional, preferably a member of the Royal Institution of Chartered Surveyors.

5.10.8 If appropriate, for example a community group together with a developer submit a bid to acquire the asset and assessment of potential purchasers will be conducted by way of an appropriate weighted scoring matrix (this will ensure compliance with S123 requirements), like the one attached as **Appendix 6.**

5.10.9 Once a purchaser is found, following confirmation in respect of proof of funding and ability to proceed then Heads of Terms (subject to contract) are to be agreed. The necessary authority to dispose will be sought at this point in accordance with the approved governance.

5.10.10 Websites/marketing boards should be updated to reflect the property sale

5.10.11 The Legal team should be instructed by the relevant Property surveyor to prepare the relevant legal documentation.

## 4.11 Public Open Space and Common land

- 4.11.1 Disposal of land which is, or forms part of an area of Public Open Space or Common Land (excludes amenity land), is subject to special rules and procedures. **(see Appendix 3)** Before disposing of such areas, the Council is obliged to publish the intention to dispose and consider any representations which are subsequently received. Publication is to be considered for a 2 week period via the local press
- 4.11.2 The provisions regarding the disposal of Common Land require consent from the Secretary of State and replacement land to be made available where the area of land to be sold exceeds 200m<sup>2</sup>.

## 4.12 Best Consideration

- 4.12.1 Best consideration is not necessarily the highest financial offer available, it can also reflect the substance and strength of any supporting information submitted with an offer including the financial security of a bidder and the commitment of the bidder to a proposed scheme (except in the case of an auction).
- 4.12.2 The Council will comply with normal and prudent commercial practices including obtaining the view of a professionally qualified valuer as to the likely financial consideration that can be expected for any disposal and the most appropriate method of disposal to encourage bidders to offer the best consideration; where time and available budgets allow, two valuations is considered best practice to demonstrate best value.
- 4.12.3 The Council must test whether an offer is the best that can reasonably be obtained having regards to any restrictions or the effect on value of any conditions placed on the use of the land, including whether the offer under consideration is reliable, advice on possible changes to the price that may flow from changes to the planning position etc. The Valuer should also consider the most appropriate pricing structure. It may be appropriate to use an overage arrangement, whereby the Council receives future payments representing any uplift in value of the land/property once it has been developed / sold on.
- 4.12.4 Overage provisions negotiations can be complex, so it would be sensible to discuss the preferred structure with the legal adviser and valuer prior to agreeing terms of the disposal. A calculation of the overage that the Council is likely to receive and the likelihood of that sum being correct given changing market conditions will be essential to assessing the business case for disposal of surplus property.
- 4.12.5 In determining whether or not to dispose of land for less than best consideration, the Council will ensure that it complies with normal and prudent commercial practices, including obtaining the view of a professionally qualified valuer as to the likely amount of the undervalue. Any decision to sell at an undervalue will be made by the Portfolio Holder.

## 4.13 Disposal Terms

- 4.13.1 Wherever possible, the Council will endeavor to keep land and property disposals simple and cost effective for both parties. For certain types of disposals, it may be necessary for the Council to impose terms which are considered necessary to protect the Council's interests. Such terms may include:
- 4.13.2 **Development Obligations** – The Council generally will only dispose of strategic development land for identified development proposals. Where appropriate, the Council will impose obligations to commence and complete the proposed development within a reasonable timescale backed up with an option for the Council to re purchase the land.
- 4.13.3 **Development Option Agreements** – Development agreements will be used for the disposal of strategic development sites where the principal aim of the disposal is to facilitate regeneration benefits from a particular scheme.
- 4.13.4 **Overage and claw back** – Where appropriate, disposals will include provisions for securing a share of future enhanced values through the use of overage and claw back clauses.

## 4.14 Fee Recovery

- 4.14.1 Where appropriate, the Council will seek to recover from third parties, its reasonable legal, surveying and administrative costs incurred in dealing with all matters involving the non-operational portfolio. The fee recovery will be determined on a case by case basis.

## 4.15 Other Considerations

- 4.15.1 In most cases, disposals of land will fall outside the scope of the Public Contracts Regulations 2015. However, if as part of the disposal the Council is involved in determining the scope of future development of its land and its intention is to impose on the purchaser certain obligations as to the nature of the development, possibly including certain standards to which the works must be constructed then the result may be that procurement rules will apply.
- 4.15.2 The Estates Team must consider the possibility of public procurement rules applying to any disposal and in all such cases must refer the matter to Legal and Procurement for comment before proceeding further with the proposed disposal.



# Appendices

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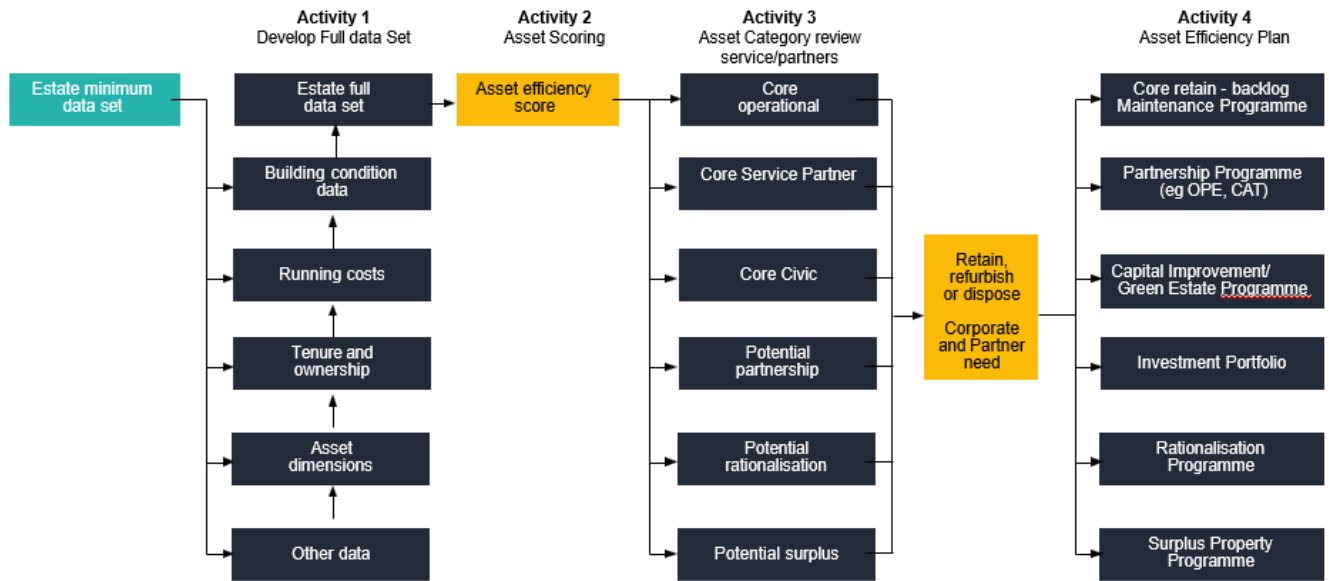
# APPENDIX 1

## Identify Surplus Assets through the Asset Challenge Framework

### 1.0 Background

- 1.1 The process of estate optimisation aims to identify and prioritise those sub-portfolios that have the greatest potential to release savings. Core data for each building within the NFDC's portfolio including running costs, value, condition and backlog maintenance, suitability assessments and future need ratings will be reviewed.
- 1.2 Using this process, those portfolios with high revenue spend and/or those portfolios subject to significant business change can be identified and subjected to a more detailed analysis and opportunity assessment.
- 1.3 The process to undertake the estate optimisation as outlined in the diagram below. The outcome of this review will include:
  - Financial analysis of the estate
  - Potential revenue impact and capital generation opportunities
  - Ranked by the potential impact (low/medium/high) and ease of implementation (quick/medium/long term)
  - Quick wins which would help release existing liabilities
  - Longer term initiatives which may substantially change the way the estate is managed
  - Recommendations and next steps for how the opportunities could be delivered
- 1.4 Following identification of assets that are suitable for potential disposal the Corporate Asset Disposal Policy process will then be followed.

Strategic Purpose	Opportunities and Risks	Performance Appraisal	Options Appraisal	Pre-Implementation Consultation	Outcome
<ul style="list-style-type: none"> <li>Why do we have the asset?</li> <li>What is its strategic purpose?</li> <li>Who is accountable for performance of it?</li> <li>What do we expect of it?</li> <li>Is this financial, non-financial or both?</li> <li>How do we measure its performance against purpose?</li> </ul>	<ul style="list-style-type: none"> <li>Are there any opportunities that could be developed?</li> <li>Are there any blockages to exploiting these opportunities?</li> <li>Any there any risks to overcome?</li> </ul>	<ul style="list-style-type: none"> <li>What is the financial performance being delivered?</li> <li>Can non-financial benefits be quantified?</li> <li>What are the management costs?</li> <li>Are there any invisible costs?</li> </ul>	<ul style="list-style-type: none"> <li>Balance of performance opportunities and risks?</li> <li>What options are available?</li> <li>What are the relative costs and benefits of these options?</li> <li>Do any options present increased risks?</li> </ul>	<ul style="list-style-type: none"> <li>Internal stakeholders</li> <li>External stakeholders and partners</li> </ul>	<ul style="list-style-type: none"> <li>Retained</li> <li>Repurposed/Recycled</li> <li>Disposed (Asset Transfer or Open Market)</li> </ul>



# APPENDIX 2

## ENQUIRIES FOR MINOR LAND DISPOSALS

### 1.0 Background

- 1.1 The Estates team receives a number of requests to purchase land for use either as gardens or for parking purposes. The challenges facing the council are to respond to enquiries in a timely way and to achieve a balanced and consistent approach to applications so as to ensure that disposals if they do occur do not have unintended consequences for adjacent occupiers and landowners.
- 1.2 This sets out how disposals of small parcels of land, which typically may be council-owned amenity land, can be agreed/progressed.
- 1.3 The attached procedure for disposing of parcels of council-owned land strikes a balance by setting out a transparent process for assessing applications and a fee and charges process so that the costs of considering an application are met.

### 2.0 Procedure

- 2.1 In cases where an enquiry is made to the council for the sale of a piece of land by a neighbouring owner and the land is surplus to requirements, 9 Asset Challenge Framework) is unlikely to have any developable or open market opportunity for sale and has a market value of less than £10,000, it is permissible in these instances with the agreement of the Strategic Director Corporate Resources & Transformation to adopt 'confined negotiations' with the adjacent or neighbouring owner to achieve the most advantageous financial result or for reasons of good estate management (e.g. if the land is 'landlocked' or is difficult or expensive to maintain).
- 2.2 Furthermore, it is likely that the sale of such parcels of land will be considered where:
  - There is a broader community benefit to the disposal e.g. rationalisation of small parcels of 'backland' open space, either rarely used or often misused.
  - There are management/financial issues for the council e.g. that the land is costly to maintain.
  - The enquiring party has extenuating circumstances e.g. there are health grounds in relation to the application and/or progressing the sale of the land would improve the quality of life and would not adversely affect the quality of life of others in the neighbourhood.
- 2.3 These owners are considered 'special purchasers' as these particular assets have special value to those owners only – the advantages arising from the ownership of a particular piece of land would unlikely be available to other buyers in a market. It may also be in the council's interest to initiate and/or

pursue these minor disposals in order to reduce the ongoing maintenance liabilities and obligations associated with holding these (sometimes isolated) pockets of land.

2.4 Each request should be dealt with on a case-by-case basis, but the following should be considered in every request:

- A requirement to get obtain the 'best price' for the parcel of land
- Whether any pre-emption rights exist
- Whether market testing has or should take place
- How the land is accessed (can the enquiring party gain access without going over other council-owned property)?
- What the land is required for
- Environmental impact following any disposal
- Whether the land is a ransom-strip
- Whether a disposal of the land would have a negative or positive impact on council operations or services, including maintenance
- Would the disposal have a detrimental impact on the remaining land, where only a proportion has been requested
- Is there any relevant historical background to the land?
- Should any restrictive covenants or special conditions be attached to the disposal?
- Is the land to be disposed of a revenue generating asset?

# APPENDIX 3

## PUBLIC OPEN SPACE DISPOSALS

### 1.0 Background

- 1.1 Section 10 of the Open Spaces Act 1906 states: "A local authority who have acquired any estate or interest or control over any open space or burial ground under this Act shall, subject to any conditions under which the estate, interest or control was acquired:
  - (a) hold and administer the open space or burial ground in trust to allow, and with a view to, the enjoyment thereof by the public as an open space within the meaning of this Act and under proper control and regulation and for no other purpose; and
  - (b) maintain and keep the open space or burial ground in a good and decent state..."
- 1.2 The case of *Muir v Wandsworth Borough Council* [2017] EWHC 1947 (Admin) (28 July 2017) provided guidance to local authorities on the scope of the restrictions that apply to disposals of open spaces.
- 1.3 Further, open space is defined in the Town and Country Planning Act 1990 as any land 'laid out as a public garden, or used for the purposes of public recreation, or land which is a disused burial ground'. It is generally considered to be a valuable community resource, to be enjoyed by the wider community and there will be a general presumption against the disposal of these assets.
- 1.4 The council will not normally dispose of any core recreational open spaces by way of freehold transfers, but may consider applications for the disposal of 'incidental' open space and areas of landscaping, particularly where it will improve the management of land benefitting the wider public or where a disposal would remedy the anomalies of past land sales, acquisitions and transfers.
- 1.5 It is anticipated that potential disposals of this 'incidental' land to enquiring parties will generally follow the principles outlined in Appendix 2 (Enquiries for Minor Land Disposals) with the requirement that any proposed disposal of public open space be adequately advertised.

### 2.0 Procedure

- 2.1 In the event that a disposal of 'incidental' public space is proposed (typically where the area in question does not provide a valued opportunity for sport, recreation or leisure), there is a legal requirement for the council to give notice of the intention to dispose by placing a notice in a local newspaper for two consecutive weeks and consider any objections that are received as a result.
- 2.2 All costs of advertising the proposed sale must be met by the (if applicable) by the enquiring party.

- 2.3 Any objections that are received must be adequately considered.
- 2.4 In agreeing to the disposal of such land, the council should consider whether the personal safety for users of any remaining nearby open space will be detrimentally affected (e.g., where a narrow alleyway is created). Furthermore, sales which lead to a loss or destruction of the visual quality of the surrounding area should not be contemplated unless there are covenants imposed on the sale to retain the open nature of the landscaped area and/or to require certain standards of new boundary fencing, walling or delineation are met.

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# APPENDIX 4

## CRICHEL DOWN RULES

### 1.0 Background

- 1.1 In 2015 the Department for Communities and Local Government updated a circular entitled “Compulsory Purchase and the Crichel Down Rules” which prescribed the way in which all Government departments and executive agencies that are subject to a power of direction from a Minister must manage the disposal of land previously acquired by the use of compulsory powers. Local authorities, which are not subject to a ministerial power of direction, are not subject to such a prescription but are still recommended to also follow the rules.
- 1.2 In particular the General Rule of these guidelines states that “where a department wishes to dispose of land to which the Rules apply, former owners will, as a general rule, be given the first opportunity to repurchase the land previously in their ownership, provided that its character has not materially changed since acquisition.” Disposals to former owners under these arrangements will be at current market value.
- 1.3 This principle was established in the 1954 Crichel Down case and has been used as a guideline ever since.
- 1.4 It is recommended that the council has regard to these rules when disposing of land that was formerly acquired by compulsory means subject to the following guidance.

### 2.0 Stage 1 Identification of land

- 2.1 Crichel Down rules relate to land that has been compulsorily acquired by the council and is no longer required, subject to the following exceptions:
  - Agricultural land acquired before the 1st April 1935.
  - Agricultural land acquired on or after the 30 October 1992 that becomes surplus to requirements more than 25 years after its acquisition.
  - Non-agricultural land that becomes surplus and available for disposal more than 25 years after its acquisition.
  - Land which has materially changed since acquisition.
  - Land where boundaries of agricultural land have been obliterated.
- 2.2 The date of acquisition is the date of the conveyance, transfer, or vesting declaration.



- 2.3 There is also an exception in relation to the disposal of small areas of land where the attempted identification of an absent former owner who has now disposed of his/her interest in land adjacent to the subject property would be out of proportion to the value of the land. Only where the current market value of the subject is likely to exceed the value of £25,000 will the council be obliged to take steps as specified within the Rules to identify a previous owner.
- 2.4 Despite these exceptions it is acknowledged it may still be appropriate to first offer to the adjacent landowner unless there are overriding local circumstances or best value may not be achieved.
- 2.5 Recent guidance indicates that the Rules will not apply where land is to be transferred to another body which is to take over some or all of the functions or obligations of the authority that currently owns the land. In this case the transfer itself does not constitute a “disposal” for the purpose of the Rules.
- 2.6 Disposals for the purposes of Private Finance Initiative/Private Public Partnership projects also do not fall within the Rules and the position of any land surplus once the project has been completed would be subject to the Private Finance Initiative/Private Public Partnership contract.

## 3.0 Stage 2 Consultation

- 3.1 Consultation shall take place with the Transformation Board.
- 3.2 Local Authorities as previously stated are not under a statutory obligation to comply with the Criche Down rules. Therefore, any compliance with these rules will be at the discretion of Head of Development and Regeneration in consultation with the Head of Legal and Democratic.
- 3.3 For instance where it is concluded that there is an overriding local or community interest such as a disposal to a parish council, registered charity or other properly constituted body where best value may not be achieved, then upon the direction of the Strategic Director Corporate Resources & Transformation disposal may proceed to such a body even when it was not the former owner of the property.

## APPENDIX 5

### KEY DECISION SCORECARD

A copy of this completed scorecard should be included in any disposal business case. If the answer to any of these questions is YES, then a key decision requires to be made.

If the answer to statement 3 is YES. The asset maybe suitable for a Community Asset Transfer

Statement		Yes / No
<b>1</b>	Is the valuation of the asset greater than £150,00?	
<b>2</b>	Does the asset cover 2 or more wards?	
<b>3</b>	Is the asset predominantly used on a regular basis by the community or booked for community use and benefit?	
<b>4</b>	Is there potential for reduced community benefit post transfer?	

## APPENDIX 6

### BID BALANCED SCORECARD

Bidder	Price	Score (60)	Due Diligence	Score (15)	Community Value	Score (25)	Total

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# Community Asset Transfer Policy

## Estates, Valuation and Facilities

27<sup>th</sup> May 2025

Version number Version 3.0

Version	Author	Date	Changes made
Version 1	John Cooper	10/03/25	Initial document
Version 2	John Cooper	14/05/25	Changes to format and order of the document
Version 3	John Cooper	27/05/25	Removal of Roles and Responsibilities Section CAT Scorecard decision card (Appendix 2) Various minor section updates

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# 1 Introduction

- 1.1 New Forest District Council (the Council) has a variety of assets and facilities under different tenure including public, voluntary and private ownership many of which are hosted and used by different groups often for community led activities such as community centres, public conveniences and other recreational assets.
- 1.2 The aims of this policy are:
- a) To identify the process and tools for the Council to follow when it considers the transfer of its buildings or land to different forms of community ownership. It will ensure the Council can work in a consistent manner when embarking on a community asset transfer.
  - b) To establish the nature of the organisations to which the Council will consider an asset transfer, the basis of the transfer and how requests will be processed.
  - c) To establish a thorough and transparent process that is to be completed prior to any transfer being undertaken.
  - d) To define the legal form a transfer agreement would take.
- 1.3 This policy outlines key information on Community Asset Transfers and is supported by annexes giving further information including a guide to the application process. These annexes will be updated as the application process is refined.
- 1.4 This policy and any associated annexes are not intended to provide advice to individual organisations about their rights or capabilities for stewardship of Council property. Each organisation should seek their own professional advice when considering whether to make an application.



## 2 Legislative and regulatory context

- 2.1 The Quirk Review in 2007 'Making Assets Work – Community Management and Ownership of Public Assets', recommended that community asset transfer can work if both its risks and benefits are made clear. It also highlighted the transfer process itself can offer greater access to funding and greater use of community facilities.
- 2.2 The Localism Act 2011 and the Governments subsequent policy agendas to create stronger links with voluntary and third or not for profit sector organisations enables local authorities to establish processes to formalise these arrangements. In doing so one way of achieving this is for the Council to transfer the ownership of and/or management of land or buildings to a Voluntary or Community Organisation VCO through the mechanism of a Community Asset Transfer (CAT).
- 2.3 Section 123 of the Local Government Act 1972 requires the Council to obtain best consideration when disposing of land and property. Whilst each CAT proposal will be assessed on its merits, due to the requirement to comply with Section 123 and to ensure that transferred assets continue to be used for community benefit, disposals for CAT will mostly take the form of a lease agreement transfer.
- 2.4 Under the same section of the Local Government Act, the Council is also required to publicly advertise any proposed disposal of public open space and to consider any responses prior to determining whether to proceed with the transfer. This will, therefore, be an additional step that must be undertaken where requests are received to transfer any public open space. Any objections received will be reported to the relevant Lead Cabinet Member for consideration.
- 2.5 Before entering into any CAT, the Council may need to satisfy itself that the transfer does not contravene State Aid legislation.
- 2.6 Whilst a Community Asset Transfer is not a legal requirement and its use is at the discretion of the Council, it is however a legitimate process which the Council may employ when it recognises that the voluntary sector is best placed to host community facilities as their management is often aligned and more responsive to the day to day needs of local communities businesses and the general public, it is important to note that each individual case will be assessed on its own merits and nothing in this document binds the Council into any particular course of action when dealing with the portfolio.
- 2.7 A Community Asset Transfer is a transfer of an interest in council owned property and/or land to a community organisation, including Town & Parish Councils, in exchange for securing community benefits. The Council already has many partnerships and agreements with community organisations but will consider new applications where these will bring benefits to our communities and contribute towards the Council's aims and objectives.

- 2.8 TUPE: The Transfer of Undertakings (Protection of Employment) Regulations, were introduced in 2006 to protect the rights of employees when the organisation they are employed by is acquired by a new organisation or when there is a change in service provider. Commonly known as TUPE, their purpose is to automatically transfer employees and any associated liabilities, such as pension contributions from one employer to another following an acquisition or transfer of services.

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### 3 Definitions

1. Community Assets: Land and Buildings determined by the Council as being held primarily for Community Use.
2. Community Asset Transfer (CAT): The transfer of an interest in property and or land from the council to a community group or Town or Parish Council to secure community benefits.
3. Community Voluntary Sector (CVS): CVSes are a type of local infrastructure organisation, which were established across the country after the First World War. At the time, a shortage of housing, jobs and food, economic difficulties and a general mood of disillusionment led to an increase in charitable activity, and a call to improve cooperation between voluntary and statutory bodies. The role of a CVS is to ensure that local voluntary, community and social enterprise organisations are well supported.
4. Strategic Asset Management Plan (SAMP): is a documented statement of intent and planning tool. It specifies how the Council's objectives are to be converted into asset management objectives and describes the approach for achieving those objectives.
5. Transparency Report (Property and Land): The councils published list of property holdings.
6. Community organisation/Third Sector Organisations (TSO): A formally constituted not for profit group.
7. TUPE: The Transfer of Undertakings (Protection of Employment)
8. Voluntary or Community Organisation (VCO): are organisations whose primary purpose is to create social impact rather than profit. For the purposes of community grants schemes, a voluntary or community organisation is defined as a formal organisation that has a formally constituted character. This excludes informal groups, households, families, and friends Interest in land and or property: A licence, lease and or freehold interest in land and or property.

## 4 Main body

### 4.1 Overview

- 4.1.1 The Council's portfolio of assets is varied in tenure and use and the pace of change in how the Council meets new and challenging service needs means the asset base must constantly evolve to respond to help improve and develop new delivery solutions. The Council sees this challenge as an opportunity. There will be instances when Council owned community assets often used by VCOs (Voluntary or Community Organisation) are returned to the Council, become surplus to requirements, are functionally or economically obsolete or may have the opportunity of being more effectively run by the communities themselves.
- 4.1.2 The Council's Corporate Plan 2024 - 2028 confirms a key commitment to Caring for our facilities, neighbourhoods and open spaces in a modern and responsive way. The transfer of assets to local community focused organisations, including Town and Parish Councils, can support delivery of this commitment, bringing about wider benefits to the community, Council and organisation taking ownership.
- 4.1.3 The principal aim of the Council's CAT is to ensure the efficient use of assets through community empowerment and minimise costs through retention or transformation. The Council intends that suitable assets will be made available through the CAT process in a way that:
- Encourages community empowerment and pride
  - Helps develop strong, cohesive and sustainable communities
  - Demonstrates a fair and transparent process
  - Ensures sustainable CATs do not conflict with other community projects
  - Reduces holding costs, risks and related liabilities
- 4.14 This Policy principally focuses on one type of property transfer, the category of Council owned community assets. Assets not held for community purposes will only be considered under this policy if determined appropriate by the Strategic Director.
- 4.15 This Policy contributes to the Council's objectives by providing direction to interested organisations to support them in what is a complex subject and to signpost them to other information which may assist in their decision on whether to apply.
- 4.16 Third sector organisations or groups based and operating within the New Forest District will be considered (for suitable assets) by the Council. Such organisations may take the form of town or parish councils, local community groups, charitable or not-for-profit organisations, co-operatives or community benefit industrial and provident societies.

4.17 The establishment of this policy provides the Council and its community partners with an approach to the future use and management of such assets operated for public benefit through community asset ownership and management. This will help:

- Define when Community Asset Transfer is appropriate.
- Ensure the process is transparent.
- Ensure consistency in approach to assessments.
- Focus on securing social, economic, and environmental benefits.

## 5.1 Assets Considered Suitable for a CAT

5.1.1 The Council holds land and property assets for a variety of purposes and not all of these can be considered for Community Asset Transfer.

5.1.2 The Council must also balance the needs of the community and its commitment to CAT against its need to generate capital receipts in order to invest in essential council projects. Therefore, certain assets which have the potential to generate capital receipts for the Council may not be considered suitable for transfer.

5.1.3 The Councils SAMP provides further information as to how these decisions are reached.

5.1.4 Some assets will remain under Council ownership to support the delivery of essential services, continue to provide an income to the Council or support economic activity in an area.

5.1.5 Assets no longer required by the Council for direct service delivery, together with assets already let to community groups may be considered for CAT.

5.1.6 Whilst not exhaustive these assets may include public halls, community centres, play areas and some areas of open space.

5.1.7 Other assets identified by Council Officers (through the Asset Management Challenge Framework) as being surplus to requirement or underperforming may also be considered.

5.1.8 Not all assets will be capable of transfer to third party organisations and circumstances of where Community Asset Transfers may not be possible are given as examples below:

- The asset is surplus but proceeds of sale are required as a capital receipt to fund the council's capital programme.
- The asset is held by the council to earn revenue in the form of rental/receipts income which in turn is used to fund service delivery.
- Land and property which forms part of the investment estate is held by the Council for income generation or capital growth.
- The asset is held for regeneration projects.
- The asset is held to support housing requirements.
- The asset is required for operational purposes for use by the council.

- The legal title to the land is encumbered by restrictive covenants.
- The asset was gifted to the Council for educational, leisure or other charitable purposes.

5.1.9 Each application for eligible transfer will be considered on a case-by-case basis against criteria outlined in the policy. A CAT application will be prioritised in line with service/business needs and priorities of the Council; therefore, some will progress more quickly than others.

## 5.2 Governance Process

5.2.1 The Council recognises that good governance is a key component of this strategy. The below table details the various stages, actions required and responsible person(s). Note these can also run concurrently.

Stage	Action	Responsible Person(s)	Informed	Decision Point
Stage 1	Asset Identification	<ul style="list-style-type: none"> <li>• Potential CAT identified as part of the Disposal process</li> <li>• Preferred transfer route agreed. This could be an Open Marketed CAT or if better served by a singular organisation ie. Town / Parish Council</li> </ul>	Estates	
Stage 2	Preparation for Disposal	<ul style="list-style-type: none"> <li>• Professional valuation (x 2 if &gt;£100k)</li> <li>• Consult with Ward Members</li> <li>• If Asset is an 'Asset of Community Value' then the community has 6 weeks to express an interest in the transfer</li> <li>• Write Disposal Business Case Decision paper for CAT</li> </ul>	Estates Strategic Director Corporate Resources & Transformation	Strategic Director Corporate Resources & Transformation Finance Portfolio holder
Stage 3	Approval to proceed with CAT	<ul style="list-style-type: none"> <li>• Key decision if value &gt; £150k or the asset covers multi-wards. Or if a high score is returned on the CAT scorecard</li> <li>• Review Decision paper</li> <li>• Agree any terms of transfer and route</li> </ul>	Estates Strategic Director Corporate Resources & Transformation	Ward Member  Transformation Board / Council
Stage 4	Expression of Interest	<ul style="list-style-type: none"> <li>• Create Information pack</li> <li>• Advertise the opportunity (4 weeks) if applicable – eg . not for direct route freehold</li> <li>• Receive informal enquiries</li> <li>• Review and score informal expressions of interest</li> <li>• Selected organisations to submit business case</li> </ul>	Estates	Portfolio holder Ward Member
Stage 5	Formal Submissions of Interest/Bids	<ul style="list-style-type: none"> <li>• Inform organisation</li> <li>• Receive formal enquiries</li> <li>• Consult with Organisations</li> <li>• Evaluation and scoring of bids</li> <li>• Completion of Disposal Business Case Decision Paper with recommendations</li> </ul>	Estates	Strategic Director Corporate Resources & Transformation Portfolio holder  Transformation Board

		• Council consultation of submission/decision			
Stage 6	Evaluation and Council Consultation	<ul style="list-style-type: none"> <li>• Presentation of business case and feasibility assessment by bidding organisation(s)</li> <li>• Evaluation and scoring of bids</li> <li>• Completion of Disposal Business Case Decision Paper with recommendations</li> <li>• Council consultation of submission/decision</li> </ul>	Estates	Strategic Director Corporate Resources & Transformation Portfolio holder	
Stage 7	Practical Completion	• Instructions to Legal preparing/completion of agreements	Legal		
Stage 8	Monitoring	• Monitoring arrangements post transfer.	Estates		

## 5.3 Council Initial Review of an Asset

5.3.1 When a community asset is no longer viable, is returned to the Council or it has been assessed that there is an opportunity for the community to run and manage a facility more effectively, then the Council will conduct an initial review of future options for the asset including whether it is appropriate for transfer.

5.3.2 Following an option appraisal (Asset Challenge Framework – See Strategic Asset Management Plan (SAMP)) the community asset transfer will be assessed in balance against other possible outcomes, that include: -

- Disposal
- Retention/reinvestment within the council
- Change of use

5.3.3 Reasons for the disposal of an asset via Community Asset Transfer may include:

- Supporting the third-party organisation to continue delivery of a key activity for residents/ community when the transfer will allow the organisation to bid for and secure funds and/or to support a more sustainable business model.
- Supporting the third-party organisation to deliver a specific service in line with the council's objectives where the service can best be provided through a council-owned asset.
- The asset is regularly used by the community / community groups and delivery by a third party will be deemed beneficial to the community.
- Protecting a heritage or otherwise important council asset that may fall into disrepair if stewardship is not provided by a third sector organisation.

- When a Town Parish/Council or third-party organisation is considered to be best placed to provide an alternative delivery model for an existing council service from an existing council-owned asset.

5.3.4 The table below summaries the benefits of a Community Asset Transfer:

Benefits to the Community	Benefits to the Council	Benefits to a Third-Party Organisation
<ul style="list-style-type: none"> <li>• Increased/improved local based service provision</li> </ul>	<ul style="list-style-type: none"> <li>• More efficient use of a public sector asset.</li> <li>• The use of volunteers and their local knowledge and hands-on management can result in lower overheads and value to the community.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased sustainability for organisations and increased leverage with other public and private sector organisations.</li> <li>• A well-managed asset can provide a third sector organisation with greater financial viability and reduce dependency on grants</li> </ul>
<ul style="list-style-type: none"> <li>• Improved sense of community identity / pride and potential for greater community cohesion</li> </ul>	<ul style="list-style-type: none"> <li>• Enable external organisations to complement public service provision in ways that are more responsive and better related to local need</li> </ul>	<ul style="list-style-type: none"> <li>• Enables an external organisation to apply for funding that is not available to the council and/or even to secure loan finance on the value of the asset</li> </ul>
<ul style="list-style-type: none"> <li>• Potential to provide additional jobs , training and business opportunities locally</li> </ul>	<ul style="list-style-type: none"> <li>• Enables effective partnerships between public sector and third sector organisations to enhance local services</li> </ul>	<ul style="list-style-type: none"> <li>• Facilities collaboration and resource sharing amongst organisations</li> </ul>
<ul style="list-style-type: none"> <li>• Contribute to physical regeneration</li> </ul>		
<ul style="list-style-type: none"> <li>• Potential to increase skills, confidence and aspirations locally</li> </ul>		

5.3.5 The Council is under no obligation to release any assets under this policy with the full and final decision being taken in accordance with the governance process as outlined within this policy.

## 5.4 Approval To Proceed with Disposal

5.4.1 Dependant on set criteria the delegated authority to approve the business case and disposal will be assessed on a case-by-case basis

5.4.2 A copy of the CAT Key Decision Scorecard (**Appendix 2**) should completed and be included in any CAT disposal business case. This will determine the delegated authority route for the approval of disposal.



## General CAT Disposal

5.4.3 This covers asset value up to £149,999 and covers 1 ward.

5.4.4 A General CAT can be authorised by

## Key Decision CAT Disposal

5.4.5 A key decision will be required if the following criteria is met

- The value of the asset is greater than £150k  
or
- The asset covers more than one ward

5.4.6 A key decision scorecard will be completed prior to proceeding with any disposal. This will provide guidance on the correct governance route.

5.4.7 A key decision will be authorised by

## 5.5 Consultation

5.5.1 The following consultation will be required during the CAT process

Consult With	Comment	Length of Time
<b>Ward Members</b>	<ul style="list-style-type: none"> <li>During the disposal preparation stages. This is to gauge feedback for the CAT</li> <li>Before a report goes to Cabinet or Cabinet Committee / Transformation Board – Assets on land and property within their Ward</li> </ul>	20 days
<b>Portfolio Holder</b>	<ul style="list-style-type: none"> <li>During the preparation and disposal stages. This is to gauge feedback for the disposal. This feedback will be included in the disposal business case</li> </ul>	
<b>Community</b>	If the asset is registered as an asset of community value	6 weeks
<b>General Public</b>	If the asset is available for open market CAT. This needs advertising	4 weeks

## 5.6 What Criteria will the council use to consider a Directly Awarded Community Asset Transfer?

- 5.6.1 It may be decided at the initial stage following the Asset Challenge Framework that a Town/Parish or similar organisation has been identified as better suited for the delivery of services for the benefit of the community through a Community Asset Transfer. In this instance direct discussions between parties will be instigated.
- 5.6.2 Following discussions the outcome will be:
- Directly award the CAT
  - Market the Asset to all third-party organisations
  - Do not proceed with the CAT and the Council retains the asset

## 5.7 What Criteria will the council use to consider a Community Asset Transfer?

- 5.7.1 Interested third party organisations will be invited to provide a business case, demonstrating their capacity and experience to manage the facility and show how they can contribute to the council's corporate objectives.
- 5.7.2 Organisations which strive to improve the wellbeing of the whole community or those which include the co-location of several organisations will be encouraged in this respect.
- 5.7.3 When applying for a CAT, the applicant should provide a thorough business case that demonstrate how it will:
- Generate social, economic or environmental benefits which directly benefit the people of the New Forest District as a whole.
  - Generate a clear community or social demand which will benefit as wide and diverse a range of local people as possible.
  - Implement robust systems, governance and policies, as evidenced by a recognised quality mark or business standard.
  - Be managed and have directors or committee members who have the necessary experience and skills. Including details of contingency arrangements should the transfer prove unsustainable.
  - Have viable proposals in place to access capital and create future revenue streams to support the ongoing management and maintenance of the asset as well as the running of the project itself.
  - Contribute towards the Council's corporate objectives, community priorities and those of the Council's strategic partners, including a statement of benefits and outcomes and how performance of these will be measured.
  - Not duplicate or negatively impact on other services or facilities already provided in the local community.

## 5.8 Information Packs

5.8.1 As part of the marketing of the asset an information pack will be developed. This will include (where applicable)

- Asset description, construction date and construction type
- Photograph(s) of the asset
- Plan Drawings
- Red line plans
- Condition survey (ideally current and forward planning)
- Asbestos report
- Running costs, planned and reactive maintenance

## 5.9 TUPE

5.9.1 Due to the nature of some transfers there maybe TUPE implications. It will be the Councils responsibility to determine any employees that will be affected by TUPE during any transfer.

5.9.2 Establishing whether the test is satisfied can be difficult in a case where employees are not assigned to a particular property. The rule of thumb that an employee who spends more than 50% of their working time on duties relating to a particular property will transfer.

5.9.3 The table below provides guidelines on responsibilities of both organisations:

Responsibility of the Council	Responsibility of the TSO
<ul style="list-style-type: none"> <li>Identify whether any employees are employed at the property, and establish by whom they are employed</li> </ul>	<ul style="list-style-type: none"> <li>Obtain sufficient information to understand whether employees will transfer under TUPE and, if so, what their terms and conditions of employment are</li> </ul>
<ul style="list-style-type: none"> <li>Understand the terms of any lease contract with TSO and who is responsible if an employee is made redundant</li> </ul>	<ul style="list-style-type: none"> <li>Analyse whether any changes to terms and conditions will be necessary</li> </ul>
<ul style="list-style-type: none"> <li>Provide employee liability information as required under TUPE</li> </ul>	<ul style="list-style-type: none"> <li>Inform the council about any "measures" that will affect the employees post-transfer</li> </ul>
<ul style="list-style-type: none"> <li>Carry out an information and consultation process with affected employees or their representatives</li> </ul>	<ul style="list-style-type: none"> <li>Obtain contractual indemnities and warranties from the Council</li> </ul>
<ul style="list-style-type: none"> <li>Obtain contractual indemnities from the transferring organisation</li> </ul>	

5.9.4 Human Resources will be engaged to determine if TUPE applies.

## 5.10 Tenure Arrangements

5.10.1 The mechanism for transferring the council's community assets is not limited but recommended on a case-by-case basis. Generally, estates will provide a recommendation on the appropriate transfer tenure in line with the governance process. It is likely to take place through either a:

- Long lease
- Short lease
- Freehold transfer
- Licence to occupy
- Management Agreement

5.10.2 If an official transfer is not deemed appropriate the CAT application will be refused but the Council may recommend one of the following types of agreements if they would like to support the proposal.

- Community Use Agreement – protects community use of an asset.
- Management Agreement – leasing asset along with contract and service specification
- Licence to Occupy

5.10.3 All parties will be responsible for their own costs in relation to the transfer unless the Council decides otherwise.

## 5.11 Duration of Lease Agreements Granted

5.11.1 The council will review the needs of the transferee organisation, the condition of the asset to be transferred, and the requirements of any funding arrangements. The duration of any agreement will be determined with consideration to:

- Any future requirements by the council
- The organisations business plan (where applicable)
- Financial standing and capacity of the organisation
- Experience and capacity of organisation to manage the asset
- The condition and status of the asset

5.11.2 The Council will normally only grant leases to organisations that have governance in place to prevent distribution of assets to members (asset lock) and will contain clauses that prevent the asset being used for other than community benefit.

5.11.3 Consideration will also be given in relation to the lease length to enable the transferee organisation access to grants and funding. For example and not exclusive to:

- Sports England
- Third Party Grants / Funding

- 5.11.4 Community Asset Transfer agreements or leases will include a service agreement that will explain the expected benefits of the community asset including any requirement for use of the asset by local neighbourhood groups or residents for other local events or lawful activities
- 5.11.5 Agreements will be drafted to prevent the asset being assigned or sold for unintended financial gain and at expense of community agreed benefits.
- 5.11.6 Additionally, agreements will include clauses to ensure return of the asset to the council if service agreements and other covenants, are breached or for instance cases of the organisation becoming insolvent or facing dissolution.
- 5.11.7 Whilst casual hirings and lettings will be permitted, any longer-term arrangements with third parties will require the Council's express approval to ensure that the property remains available for the purpose it was released.

## 5.12 Asset Condition

- 5.12.1 Assets will be transferred in their current condition.
- 5.12.2 The transfer agreement will include responsibility for maintaining the asset, any repairs required conditional upon completing the agreement, insurance obligations and other outgoings for the building.
- 5.12.3 Periodic site inspections will take place to ensure the terms of the agreement are being met (property condition and compliance/safety standards are satisfactory) if not the agreement may be terminated.
- 5.12.4 The Council would encourage and welcome investment in assets made available to community groups and, in some cases, may require applicants to raise or bid for external funding to enable investment in the asset as a condition of the transfer. However, any proposed major works (except on a Freehold transfer) would require the Council's prior approval, the purpose again being to ensure that the property remains suitable for the use for which it was released (or any subsequently agreed variation).

## 5.14 What should the Application for CAT contain?

- 5.14.1 For guidance for bidding organisations the below highlights areas to be covered within their respective applications and presentations and should be considered in conjunction with the Expression of Interest documentation contained in Appendix 1.
  - Full details of the identified needs that will be met by the CAT.
  - Clear evidence of the capacity and experience of the TSO to manage and develop the asset, using the Expression of Interest toolkit as a guide (example in Appendix 1).

- Detailed evidence that the CAT is financially sustainable over the life of the business plan and will not incur future financial liabilities for the council, eg cash flow forecasts, projected utilisation rates, and details of any financial support secured from or pledged by funders and lenders.
- Details of the anticipated benefits that the CAT will produce and how these will be measured.
- Details of the type of CAT and lease terms sought.
- Evidence of support from council officers or departments, council members, other local stakeholders and potential funders.
- A robust risk assessment of the CAT and details of alternative arrangements in the event that the CAT proves unrealistic or not sustainable.

## 5.15 Application/Decision process

- 5.15.1 If there are several parties interested in pursuing an asset that is available for transfer, then the Council will first encourage collaboration between the different organisations. Where this may not be possible the outcome will be determined by a competitive process with the successful organisation becoming the Council's partner in the transfer.
- 5.15.2 Depending on business needs/priorities, some applications may progress faster than others, but it is still important that the applicant follows the process and provides the necessary evidence, and any additional information as and when required, to support the application at the different stages.
- 5.15.3 The Assessment of the application will be carried out using various council resources including the most appropriate method for the process e.g. balanced scorecard, a panel of relevant Council leads may be convened to discuss the application and reach consensus before making recommendations in accordance with the governance process.
- 5.15.4 Council Officers will need to consult with local ward members on any proposals within their ward area.

# Appendices

DRAFT

# Appendix 1

## Expression of Interest – Application Form

DRAFT





**New Forest**  
DISTRICT COUNCIL

## Community Asset Transfer Proposal

<Insert Building Name>

DRAFT

# Invitation to Submit Proposals

## Introduction

New Forest District Council is prepared to receive proposals from community organisations based in the New Forest District, on the future running of <insert building name and address here>.

The successful organisation will be invited to enter into a full repair and insure lease with New Forest District Council in respect of the above property. The specific terms of the lease will be dependent upon the nature of the successful bid and will be negotiated with the successful applicant on completion of this process.

Organisations may be invited to work together to deliver services from the premises and we encourage partnership or consortium proposals.

Organisations wishing to submit a proposal will be required to detail their plans for the asset by completing the <attached form> / <using the form available at web address>.

Each organisation's response should be detailed enough to allow the Council to evaluate whether the bid represents good value for money and meets the criteria set out in this document.

If you wish to arrange a viewing of the building, please contact <named officer> on <insert email and phone number>.

A detailed information pack in relation to this asset can be found on the New Forest District Community Asset Transfer web page < web address>.

## Who can apply?

To be eligible your organisation must:

1. Have a governing document such as a constitution or articles of association.
2. Be based in the New Forest District, preferably with a track-record of working in the <insert town/parish> area.
3. Have a board of trustees or directors comprising people that live and work in New Forest District (not relevant to a Town or Parish Council).
4. Be a not-for-profit organisation – this includes voluntary and community organisations, co-operatives and mutual societies, non-governmental organisations which are value driven and which principally invest their surpluses to further social, environmental or cultural objectives.
5. Be an incorporated organisation or be willing to incorporate in order to sign a lease. Community leases must be in the name of your organisation, rather than a named individual. If you are unsure what this means for your organisation, please contact XXXCVS for additional advice.

## Your proposal

Your proposal should demonstrate:

- That your proposals are focused on the needs of the community.
- You should demonstrate that there is a gap in existing services and/or proven demand for existing services / activities.
- Support from the local community for your proposals. You must demonstrate that your proposals are supported by local people - this could be through a petition, responses to a questionnaire exercise you have completed locally, a needs assessment you have carried out etc.
- Your organisation's history and experience of developing and delivering a range of services to a diverse community.
- Your organisation's track record of managing a similar asset. This should include your estimates of the cost of managing this asset sustainably and how you will secure sufficient funding to meet them.

Your organisation should produce a business plan that details some or all of these requirements. You are required to provide a copy of your business plan in support of your application, but you may also wish to cut and paste information from your business plan into the following form to demonstrate how you will meet these requirements.

## Timetable

The deadline for submitting your proposal is <insert deadline>. Following this a panel of senior officers from the council will score each application and liaise with local councillors to select the organisation that will provide the best selection of services to the local community.

You maybe requested during this process to provide a presentation in relation to your organisation and proposal.

You will be notified of the outcome of your proposal <insert date>.

## Queries relating to this document.

If you have any queries regarding this document or process, please contact <named officer> on <insert email and phone number>.

Please note however, we cannot offer advice on how to write your proposal or the strength of your proposal. If you need support to complete your proposal, help is available from XXXCVS, who can be contacted on XXXXXXXX or at email address

## Section 1 - Organisation Details

Contact details and status of organisation

1.1	Full name of organisation:
1.2	Date organisation was formed:
1.3	Contact details
	Address:
	Contact name:
	Position in organisation:
	Phone Number:
	Fax Number:
	E-Mail Address:
1.4	Please state what the key aims and objectives of your organisation are:
1.5	Please outline how your organisation is governed (i.e., are you a registered charity, a charitable incorporated organisation, a community interest company etc).

<p>1.6</p> <p>a</p> <p>b</p> <p>c</p> <p>d</p> <p>e</p>	<p>Please provide examples of the following documents in support of your application:</p> <p>Your governing document</p> <p>Your most recent accounts</p> <p>Evidence of a bank account in the name of the organisation</p> <p>Evidence that your trustees or directors meet regularly</p> <p>Your current business plan – if your organisation does not currently have a business plan, a template is attached for you to use. We will not accept an EOI without a business plan.</p>
<p>1.7</p>	<p>If any person involved with your group, either in its governance or in the delivery of services, in a paid or voluntary capacity has a relationship with an officer or member of New Forest District Council please provide the details here:</p>

# Section 2 – Service Delivery

2.1. What services are you proposing to deliver from the centre that will be run on a **weekly** basis? Include a brief description of each service and who it is aimed at, how often you will run the service, how many people you believe will use each service and what outcome you believe the service will deliver. Continue on additional sheets if necessary.

Service name	Times/Dates	Target Community	Outcomes

2.2 What services will you run on a **monthly, annual or irregular** basis? Please include a brief description of each service and who it is aimed at, how often you will run the service and how many people you believe will use each service. Please continue on additional sheets if necessary.

Service name	Times/Dates	Target Community	Outcomes

2.3 Do you plan to work with other organisations in New Forest District to deliver services? If so, detail which organisations you already have plans to work in partnership with, what services they will provide and what outcomes you believe the service will deliver for local people. Only include those services you have already agreed upon with other organisations.

Service Provider	Service name	Times / Dates	Target community	Are you already working with this organisation?	Outcomes



## Section 3 – Evidence of support and need

3.1. How do you know that the services you are proposing to deliver are needed by the local community? Please provide what evidence you have gathered in support of your application – this could be from questionnaires you have sent to local people or the results of consultation events you have put on locally.

3.2. What parts of the community are you targeting with your services?

Describe which communities you are intending to work with and how you will appeal to different parts of the local community.



3.3 How will you monitor the impact of the services that you are proposing?

3.4 How will you review your service plans to ensure that they continue to meet the changing needs of the local community?

## Section 4 – Proposed Costs.

- 4.1 Please provide a detailed breakdown of your estimates for running the facility and provide information on how you will meet these costs. You should try and demonstrate that your organisation has a good understanding of the requirements of running a building and has the resources to meet those requirements.

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9	Month 10	Month 11	Month 12
<b>Income (you may change the headings)</b>												
Grant income												
Sales income												
Other income												
<b>Total income</b>	0	0	0	0	0	0	0	0	0	0	0	0
<b>Expenditure (insert your own sub-headings)</b>												
<b>Fixed costs</b>												
Core staff salaries												
Telephone												
Marketing												
Professional fees												
Insurance												
<b>Total fixed costs</b>	0	0	0	0	0	0	0	0	0	0	0	0

<b>Variable costs (insert your own sub-headings)</b>												
eg Contract staff												
eg Travel												
eg Cost of products etc												
eg Venue hire												
<b>Total variable costs</b>	0	0	0	0	0	0	0	0	0	0	0	0
<b>Total expenditure</b>	0	0	0	0	0	0	0	0	0	0	0	0
<b>Income minus expenditure</b>	0	0	0	0	0	0	0	0	0	0	0	0
Balance brought forward	0	0	0	0	0	0	0	0	0	0	0	0
<b>Closing balance</b>	0	0	0	0	0	0	0	0	0	0	0	0

4.2 Is there anything else you would like to say in support of your application? (no more than 1000 words)

# APPENDIX 2

## CAT KEY DECISION SCORECARD

A copy of this completed scorecard should be included in any CAT business case. If the answer to any of these questions is YES, then a key decision requires to be made.

Statement		Yes / No
<b>1</b>	Is the valuation of the asset greater than £150,00?	
<b>2</b>	Does the asset cover 2 or more wards?	
<b>3</b>	Is the asset predominantly used on a regular basis by the community or booked for community use and benefit?	
<b>4</b>	Is there potential for reduced community benefit post transfer?	

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**Cabinet – 2<sup>nd</sup> July 2025**

## **Public Space Protection Order(s) Review & Extension**

Purpose	For Decision
Classification	Public
Executive Summary	<p>This report provides a summary of activities covering PSPO1 &amp; PSPO 2 since enacted by the council in July 2023.</p> <p><b>PSPO 1 prohibits within a defined area:</b></p> <p>the placing, throwing or dropping items likely to cause a fire; or lighting fires (of any type) or barbeques (including disposable barbeques and any outdoor temporary cooking facilities or equipment).</p> <p><b>PSPO 2 prohibits:</b></p> <p>feeding or providing or depositing food for consumption by any New Forest pony, horse, mule or donkey; or petting or touching any New Forest pony, horse, mule or donkey.</p> <p>The orders are for a period of 3 years and without extension, will expire on June 30<sup>th</sup> 2026</p>
<b>Recommendation(s)</b>	<p><b>That Cabinet:</b></p> <p>Approve a public consultation is undertaken to evidence and support:</p> <ul style="list-style-type: none"> <li>a) Renewal of the orders in their current form from 1 July 2026</li> <li>b) Variation of the current conditions as outlined in PSPO 1 and 2 from 1 July 2026</li> <li><b>c) Non-renewal of either OR both orders upon expiration on 30 June 2026.</b></li> </ul>
Reasons for recommendation(s)	<p>Since 1 July 2023 following the introduction of PSPO 1 &amp; 2, 399 reports of non-compliant behaviour resulted in engagement with over</p>

	<p>2,000 members of the public, undertaken by delegated officers.</p> <p>The ability of delegated officers to proceed with enforcement measures is an influencing factor in gaining compliance and ceasing of undesired behaviours or activities.</p> <p>The New Forest continues to grow and benefit as a destination of tourism. The area is unique in both its landscape and diverse wildlife inclusive of free roaming animals. Both have increased vulnerability to risk taking behaviours as prohibited within the current prohibitions.</p> <p>The continuation of the orders will enable effective and proportionate steps to be taken, where compliance is not achieved through positive engagement.</p>
Ward(s)	All
Portfolio Holder(s)	Councillor Dan Poole
Strategic Director(s)	Richard Knott – Housing & Communities
Officer Contact	<p>Brian Byrne</p> <p>Service Manager – Community Safety &amp; Support</p> <p>023 8028 5089</p> <p><a href="mailto:brian.byrne@nfdc.gov.uk">brian.byrne@nfdc.gov.uk</a></p>

## Introduction and background

1. In 2022, Forestry England and the Verderers of the New Forest raised increasing concerns relating to animal welfare from public interactions with free roaming animals and incidents of fire setting. The request was for NFDC to exercise its powers and implement restrictions on behaviour and specified activities under a Public Space Protection order.
2. To support the views expressed and meet the legal threshold of implementing any restrictions, NFDC undertook extensive evidence gathering with key stakeholders. Data obtained by Forestry England,

Verderers of the New Forest, National Park Authority and Hampshire and Isle of Wight Fire and Rescue Service informed proposals for two PSPO's which formed the basis of a public consultation.

3. On review of these findings, on 5 April 2023, under delegated powers of the Anti-Social Behaviour, Crime and Policing Act 2014, NFDC approved two Public Space Protection Orders prohibiting:
  - **PSPO 1** - placing, throwing or dropping items likely to cause a fire; or lighting fires (of any type) or barbeques (including disposable barbeques and any outdoor temporary cooking facilities or equipment).
  - **PSPO 2** - feeding or providing or depositing food for consumption by any New Forest pony, horse, mule or donkey; or petting or touching any New Forest pony, horse, mule or donkey.
4. Following induction and training by NFDC Community Safety and Legal services, staff from Forestry England, the New Forest National Park Authority and the Verderers of the New Forest were granted delegated authority by the council to enforce the two new Public Space Protection Orders (PSPOs). The enforcement process forms part of a wider toolbox of intervention, only to be utilised following a member of the public's failure to comply with positive interventions and instructions to cease by a delegated officer.
5. PSPO orders are to protect the forest from damage caused by wildfires, BBQs and for public safety and animal welfare reason. Failure to comply can result in a fixed penalty notice or prosecution for non-payment.
6. As a shared approach in managing and publicising awareness of the orders, and to ensure this met the legal requirements for enforcement, a standardised information poster was developed by NFDC. Led by Forestry England, these are displayed in areas of significance across the forest where the orders apply.
7. Information about both orders is also hosted on the NFDC website and also that of the key stakeholders with delegated authority. Additional information is provided in printed format and shared with campsites and towns and parishes across the district.

## **Review of data**

8. The issuing of fixed penalty notices forms part of the toolbox of intervention by delegated offices. During officer training, the '4E'

approach of 'Engage, Explain Educate and Enforce' formed the basis of working practice to be used by authorised officers.

9. Agencies with delegation are required to provide quarterly returns outlining activity by their respective services. Since July 2023 to 31 March 2025, there have been a recorded 399 incidents with 2,099 people being spoken to about their activities and advised of the orders and highlighting the New Forest Code.

10. Interactions are broken down as:

<b>PSPO 1</b> (Fire)	99 reports
	456 individuals
<b>PSPO 2</b> (Animals)	300 reports
	1,643 individuals

11. The number of PSPO interactions recorded are broken down by day, since its implementation until 31 March 2025.

Day of Week	PSPO Type	Number of reports logged	Number of people involved
<b>Monday</b>	1 - Fire	9	45
	2 - Pony /Donkey	57	249
<b>Monday Total</b>		<b>66</b>	<b>294</b>
<b>Tuesday</b>	1 - Fire	8	18
	2 - Pony /Donkey	31	158
<b>Tuesday Total</b>		<b>39</b>	<b>176</b>
<b>Wednesday</b>	1 - Fire	14	71
	2 - Pony /Donkey	42	284
<b>Wednesday Total</b>		<b>56</b>	<b>355</b>
<b>Thursday</b>	1 - Fire	1	2
	2 - Pony /Donkey	23	106
<b>Thursday Total</b>		<b>24</b>	<b>108</b>
<b>Friday</b>	1 - Fire	5	15
	2 - Pony /Donkey	28	106
<b>Friday Total</b>		<b>33</b>	<b>121</b>
<b>Saturday</b>	1 - Fire	33	152
	2 - Pony /Donkey	64	401
<b>Saturday Total</b>		<b>97</b>	<b>553</b>
<b>Sunday</b>	1 - Fire	29	153
	2 - Pony /Donkey	55	339
<b>Sunday Total</b>		<b>84</b>	<b>492</b>
<b>Grand Total</b>		<b>399</b>	<b>2,099</b>

12. The number of PSPO interactions recorded by month since implementation until 31 March 2025:

PSPO Type	Month	Number of reports logged	Number of people involved
<b>1 - Fire</b>	Jun 2023*	1	10
	Jul 2023	5	18
	Aug 2023	19	81
	Sep 2023	8	28
	Oct 2023	2	12
	Nov 2023	0	0
	Dec 2023	0	0
	Jan 2024	0	0
	Feb 2024	3	7
	Mar 2024	2	3
	Apr 2024	5	11
	May 2024	13	50
	Jun 2024	11	55
	Jul 2024	11	88
	Aug 2024	10	71
	Sep 2024	1	5
	Oct 2024	0	0
	Nov 2024	1	2
	Dec 2024	0	0
	Jan 2025	2	2
	Feb 2025	2	5
	Mar 2025	3	8
<b>1 - Fire Total</b>		<b>99</b>	<b>456</b>
<b>2 - Pony / Donkey</b>	Jul 2023	15	103
	Aug 2023	70	330
	Sep 2023	40	137
	Oct 2023	6	32
	Nov 2023	7	16
	Dec 2023	3	10
	Jan 2023	0	0
	Feb 2024	8	46
	Mar 2024	18	120
	Apr 2024	19	69
	May 2024	25	178
	Jun 2024	8	66
	Jul 2024	18	155
	Aug 2024	26	183
	Sept 2024	3	20
	Oct 2024	2	12

	Nov 2024	6	14
	Dec 2024	2	7
	Jan 2025	5	22
	Feb 2025	11	74
	Mar 2025	8	84
<b>2 - Pony /Donkey Total</b>		<b>300</b>	<b>1,643</b>
<b>Grand Total</b>		<b>399</b>	<b>2,099</b>

\*Both PSPOs were implemented on 1 July 2023 however data was captured for June 2023 for PSPO1 which for transparency is included in the overall stats.

13. Monitoring of incidents by location has identified the following areas of repeated non-compliance:

- Bolton's Bench - 45 reports (44 pony related and 1 fire)
- New Forest Reptile Centre - 23 reports (23 pony related)
- Outside Brockenhurst College - 18 reports (18 pony related)
- Hatchet Pond - 12 reports (11 pony related and 1 fire)
- Whitefield Moor - 12 reports (5 pony related and 7 fire)
- Janesmoor Pond - 4 reports (2 pony related and 2 fire)
- Wilverley Plain - 4 reports (2 pony related and 2 fire)
- Bolderwood – 3 reports (3 pony related)

14. These sites are currently well patrolled and targeted by rangers and they will continue to have a presence at these locations. The New Forest reptile centre experienced 23 incidents related to ponies. Further aggregation of this data shows this to be one pony with incidents being witnessed by staff working at the centre.

15. Boltons Bench, Lyndhurst continues to experience the highest volume of animal related incidents. This in part is influenced by parking facilities for visitors, tourist location and high density of free roaming animals. This is similar to the issues within Brockenhurst influenced by animal presence and high levels tourism with holiday makers residing in several local campsites.

16. The Fire Service report a reduction in fire incidents over the PSPO period.

17. To assist with the repeat locations where breaches are witnessed, New Forest District Council created a new online form for Officers to require members of the public to complete. The reporting person will not receive a direct response to their report, but content details are shared with the authorised officers at Forestry England, National Park Authority and Verderers of the New Forest to consider hotspot areas for future patrolling.

18. Since the form was launched, 60 reports have been received, 10 relating to fires and 50 relating to the feeding and petting of New Forest animals with 19 of these relating to Brockenhurst.

### **Corporate plan priorities**

19. The activities of the PSPO 1 & 2 support the Corporate Plan 2024/28 priorities:
- Empowering our residents to live healthy, connected and fulfilling lives.
  - Protecting our climate, coast, and natural world.
  - Working with our partners at the National Park and other key stakeholders to support the protection and enhancement of natural landscapes, habitats and biodiversity to ensure the future sustainability of the Forest.

### **Options appraisal**

20. The current PSPO orders expire on 30 June 2026 with options for consideration ahead of this date.

**Option A** - Undertake a public consultation to support:

- a) Renewal of the orders in their current form from 1 July 2026
- b) Variation of the current conditions as outlined in PSPO 1 and 2 from 1 July 2026
- c) Non-renewal of either OR both orders upon expiration on 30 June 2026.

**Option B** - Do not undertake a further public consultation with the orders expiring on 30 June 2026. This would result in no PSPO orders or prohibitions being in place from 1 July 2026.

### **Consultation**

21. Consultation with Forestry England, National Park Authority and the Verderers association was undertaken to inform this report, The preference expressed by all agencies is for the orders to be renewed on expiration from 1 July 2026 due to the positive impact the orders have had. As key stakeholders with delegated authority for enforcing the orders, they have committed their existing staffing resources to continue for the maximum extended period of an additional 3 years until June 2029.
22. Prior to a PSPO being extended or varied, there is a statutory requirement to undertake further consultation as was carried out when the orders were initially approved in 2023. It is proposed that

public consultation is hosted on the Council's digital engagement platform, 'Go Vocal' which has been successfully used by council services when undertaking public consultations. To increase awareness and responses, additional links will be hosted on our partner websites including request for Town and Parish Councils.

23. The consultation period is proposed to be conducted over a 4-week period commencing 14 July 2025. The questionnaire is currently in development with Legal Services. On completion, findings will be collated with a further report, including recommendations as to extend, vary or cancel the PSPOs.

### **Financial and resource implications**

24. Whilst the process requires dedicated resources, these can be met within existing staffing resources. There may be costs attributed to replacing or updating signage within open spaces with this forming part of the Partners' contributions led by Forestry England.
25. Refresher training for delegated officers will be required should the council proceed with an extension to the orders. This is facilitated by the Community Safety team and Legal services and can be met within existing resources. Following completion of training, officers are issued with Fixed Penalty Notice books and ID cards at a total cost of £1,000, which can be met from existing budgets.

### **Legal implications**

26. Introduced under the Anti-Social Behaviour, Crime and Policing Act 2014, for NFDC to make or renew a public spaces protection order(s) if satisfied on reasonable grounds that two conditions are met. The first condition is that:

- a) activities carried on in a public place within the authority's area have had a detrimental effect on the quality of life of those in the locality, or
- b) it is likely that activities will be carried on in a public place within that area and that they will have such an effect.

The second condition is that the effect, or likely effect, of the activities:

- a) is, or is likely to be, of a persistent or continuing nature,
- b) is, or is likely to be, such as to make the activities unreasonable, and
- c) justifies the restrictions imposed by the notice.



27. Payment of the fixed penalty notice, discharges liability ending all enforcement action. Where payment is not made, the council has the right to exercise its powers and elevate matters to court proceedings. Each case is reviewed by legal services to ensure the legal threshold has been met.
28. Regular reviewing and monitoring of activity by partners with delegated authority is undertaken. This is to ensure compliance is maintained with the relevant legislation as outlined under the Anti-Social Behaviour, Crime and Policing Act 2014.

### **Risk assessment**

29. Officers undertake training prior to being granted delegated authority to issue Fixed Penalty Notices. Elements of this include safe working practices, challenging behaviour and lone worker arrangements. Each agency with delegated authority as the employer, undertakes their individual agency risk-based activity assessments.
30. Public and media interest in the orders is high. The balanced approach of education and awareness raising, before proceeding with enforcement has featured in several online blogging conversations. This balanced approach is supported by key stakeholders delegated with enforcing the orders as the preferred escalation method.

### **Environmental / Climate and nature implications**

31. The objective of PSPO 1 is to reduce incidents of fire which are a cause of damage to the environment including sites of special scientific interest. Through the reduction of wildfires and BBQs, this can have a positive environmental impact through the reduction in carbon dioxide and other pollutants into the atmosphere.
32. Additionally, taking measures to prevent fires will help preserve the natural habitat and longevity of the woods, forests and heathlands within the Forest, all of which will have positive effects in terms of climate change.
33. PSPO 2 relating to the feeding and petting of Forest animals, is likely to have a positive impact for the Forest; free roaming animals are less likely to suffer illness or death through being fed the wrong food stuffs and being attracted to access roads. This also interrupts their natural habitat for food sources and ultimately, animals can lose their ability to survive on the Forest as a result of these feeding activities.

34. Historic land uses such as commoning, have shaped the Forest landscape over many centuries and human activity can interfere with these important practices, to the detriment of the Forest and wildlife as a whole.

### **Equalities implications**

35. The council has due regard to the Public Sector Equality Duty as set out in section 149 of the Equality Act 2010. The impact that the PSPOs have on the community, as well as those with protected characteristics under the Equality Act 2010 were carefully considered previously before implementation. It is not considered that either PSPO targeted those with any of the protected characteristics, and it is not considered that they will have a negative impact on those with protected characteristics. Based on the Equality Impact Assessment (EIA) screening, it is not considered that a new and full EIA Assessment is required on the occasion of renewal, but this will require reviewing prior to the decision to alter or extend the current orders.
36. Statutory guidance states that '*consideration should be given to how the use of this power might impact on the most vulnerable in our society*' and, '*consideration should also be given to any risks associated with displacement, including to where people may be dispersed to*'.
37. Authorised officers are requested to exercise discretion over the issuing of FPNs and the council will have further discretion over the decision to prosecute breaches of the PSPOs. Decisions to issue FPNs or to instigate prosecution proceedings are subject to careful and proportionate decision making.
38. The council is required at all stages to have particular regard to articles 10 and 11 of the Human Rights Act 1998, when considering imposing restrictions under a PSPO.

### **Crime and disorder implications**

39. Anyone breaching the terms of the PSPOs, without reasonable excuse, are committing a criminal offence punishable by prosecution with a maximum fine of £1000, or by the issuing and payment of a Fixed Penalty Notice currently £100, discharges liability to prosecution.

### **Data protection / Information governance / ICT implications**

40. The collection, retention and deletion of residents' data is governed by GDPR and associated guidance. All data is collected and

maintained in line with the required legislation and shared in accordance with defined and established information sharing protocols and procedures.

## **Conclusion**

41. Since their implementation in 2023, the two PSPOs have demonstrated that when used proportionately and as part of a wider toolbox of interventions, facilitate compliance and a cessation of unwanted or persistent behaviours that adversely affects the quality of life of residents.
42. To continue to protect the National Park, residents and wildlife within the New Forest from the significant and destructive harm of fire, it is recommended public consultation is undertaken to extend PSPO 1.
43. To protect the welfare of free roaming animals and members of the public from harm through unwarranted physical interactions, public consultation is undertaken to extend PSPO 2.
44. It is evident that through the combined approach of the council and partners, continued efforts in raising the profile of the orders, uniqueness and vulnerability of the New Forest are essential in developing a lasting understanding and compliance by our residents and visitors.

## **Appendices:**

## **Background Papers:**

- PSPO 1 - [The New Forest PSPO 1 \(fire\)](#)
- PSPO 2 - [The New Forest PSPO 2 \(animals\)](#)

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**Cabinet – 2 July 2025**

## **Adoption of the New Forest Skills Action Plan**

Purpose	For review
Classification	Public
Executive Summary	This report seeks agreement for the New Forest Skills Action Plan to be published and adopted.
<b>Recommendations</b>	<p><b>That Cabinet:</b></p> <ol style="list-style-type: none"> <li><b>1. note and adopt the content of the New Forest Skills Action Plan and accompanying Technical Report;</b></li> <li><b>2. support the objectives and recommended actions of the New Forest Skills Action Plan including the setting up of a New Forest Skills Group</b></li> </ol>
Reasons for recommendation(s)	To progress the New Forest Skills Action Plan through to publication and adoption. This in turn will enable the Economic Development team to work with partners to implement the actions agreed as part of its service delivery.
Ward(s)	All
Portfolio Holder(s)	Councillor Derek Tipp – Planning and Economy
Strategic Director(s)	James Carpenter – Strategic Director of Place, Operations & Sustainability
Officer Contact	<p>Tim Guymer  Assistant Director for Place Development  <a href="mailto:tim.guymer@nfdc.gov.uk">tim.guymer@nfdc.gov.uk</a>  Jeannie Satchell  Economic Development Manager  <a href="mailto:jeannie.satchell@nfdc.gov.uk">jeannie.satchell@nfdc.gov.uk</a></p>

## Introduction and background

1. Ensuring that our communities hold the skills needed for businesses both now and in the future is an important function of the economic development service of this Council in helping to support the sustainable economic growth of the District and wider region.
2. It is particularly important in the New Forest following the Solent Freeport being officially designated in December 2022. A significant proportion of the sites that make up the Solent Freeport are in the New Forest.
3. The potential benefits, expectations and commitments made in designating the Freeport have been reported to this Council on a number of previous occasions. However, a key factor in the ability of the District, and wider economy, to maximise these benefits is in understanding the particular local skills challenges that the District currently has and then preparing an Action Plan to deliver future skills training that addresses these challenges.
4. New Forest District is recognised as a unique geography with a particular combination of issues (and opportunities) relating to the provision of workforce and resident skills that more generic skills programmes haven't necessarily addressed, such as the Hampshire Chamber of Commerce *Solent Local Skills Improvement Plan* (LISP) and Hampshire County Councils *Hampshire Skills Strategy*. These issues include its rural character and location (with pockets of isolated communities), an increasingly ageing population, the underrepresentation of knowledge intensive jobs with almost twice the proportion of the population working in low skilled occupations when compared with the wider county, and significant net outflow of resident workers, often to access higher skilled roles.
5. In April 2024, Cabinet agreed that securing employment and skills is a key priority for the New Forest to ensure a legacy from the Freeport. Ensuring residents have the skills to access higher paid/higher value jobs, and that businesses have the right resources to exploit the opportunities that the Freeport will provide, is a fundamental part of creating that legacy.
6. To support this aspiration, it was recognised that a place specific skills action plan was required for the New Forest. During the winter of 2024, New Forest District Council commissioned EKOS Limited to prepare a New Forest District Skills Action Plan covering the period 2025 to 2030. The resulting Skills Action Plan is provided at Appendix One.

## **Key steps in preparing the New Forest Skills Action Plan (NFSAP)**

7. Over the last few months the consultancy team, working with officers of this Council, undertook a number of tasks in the preparation of NFSAP as follows: -
  - a. Desk-top and primary research to confirm and clarify the specific skills challenges within the New Forest.
  - b. Interviews, followed by workshops with a range of stakeholders to test the emerging findings and identify preliminary approaches to address.
  - c. Produced and shared for comment and feedback with stakeholders a draft plan; and
  - d. Produced a revised NFSAP taking into consideration comments and feedback from stakeholders.
8. The latest version of the NFSAP is provided at Appendix One. An accompanying Technical Report providing further details of the research and consultation undertaken is provided in Appendix Two.

## **Identifying the skills challenges**

9. The NFSAP is an evidenced based strategy. A significant amount of data gathering was undertaken to identify the challenges (and opportunities) in skills provision in the New Forest.
10. The following key trends were observed:
  - a. There is an ageing population & potential future decline in working age population. Higher incidences of young people moving away to study and work, due in part to the relative lack of affordable housing options;
  - b. Jobs are often lower paid & more part-time work;
  - c. Decline in key industries including manufacturing and construction - despite their importance to the local economy and the transition to net-zero. Ensuring that skills pathways support both replacement demand and future workforce needs in these sectors is critical;
  - d. Job demand: Current jobs demand continues to be in lower-paid foundational and service sectors with key employers including NHS, chefs, care workers, and cleaners;
  - e. Rising unemployment & related economic strain;
  - f. Earnings & gender pay gap - In 2024, the gross weekly median pay for full-time workers in the New Forest was £668, significantly below the national average of £732. Men earned £801 per week, while women earned £594, marking a £207 weekly pay gap. This gender pay gap has widened since 2014 when the gap stood at £173 per week; and

- g. Reliance on private transport and limited public transport options leading to some communities at risk of isolation.
11. The research and engagement has also identified groups and communities within the District that merit particular consideration in ensuring that their potential is enabled through future skills delivery:
- Women entering or re-entering the workforce;
  - Young people, especially those not in education, employment, or training (NEETs);
  - People aged 50+;
  - Job changers; and
  - Aspiring entrepreneurs and those seeking self-employment.

### **Policy context**

12. The consultancy team reviewed a wide range of strategic skills documents including the following:
- a. Skills England – *Driving Growth and Widening Opportunities*.
  - b. Hampshire County Council – *Hampshire Skills Strategy*.
  - c. Hampshire Chamber of Commerce – *Solent Local Skills Improvement Plan (LISP)*.
13. Whilst considered excellent strategies in their own right they are not capable of providing the New Forest specific skills targeted support that is the focal point of the NFSAP.

### **Defining the objectives for a successful Skills Action Plan**

14. In the context of the above the NFSAP sets out four key objectives to ensure the district's residents and businesses can thrive:
- a. *Inclusive growth*: Ensuring everyone in the New Forest can participate in and benefit from economic, social, and environmental growth, being prepared to capitalise on emerging opportunities through entrepreneurship and with a focus on priority target groups;
  - b. *A nature positive transition to a low carbon economy whilst also supporting established sectors*: Working with key partners we will deliver skills for conservation, land and forestry management, and renewable technologies to support



- a sustainable future whilst also strengthening the workforce for key established sectors;
- c. *Lifelong learning and upskilling opportunities for all*: Ensuring individuals are well-informed and prepared to make decisions about their education, training, and career pathways; and
- d. *Effective coordination of skills delivery*: We will work with key education providers to ensure a coordinated and effective skills delivery programme that avoids duplication and addresses gaps in provision.

## Setting the actions

15. Over 30 actions have been identified in the report, grouped into seven themes covering: -

- a. *Aligning skills with emerging opportunities* – Its aim is to ensure the workforce is prepared to capitalise on emerging opportunities including the Solent Freeport, renewable energy and sustainable land management. There are three actions linked with this theme including *the "development and promotion of training programmes that focus on trade, innovation and job creation within the Freeport"*;
- b. *Supporting established sectors* – This theme recognises the need to strengthen the workforce in established sectors such as 'Health and Social Care' and 'Hospitality and Tourism', ensuring they have the necessary skills to meet current and future demands. The action plan allocates 7 actions to support this theme such as "developing training programmes in customer service, hospitality management and tourism" with a view to improving the visitor experience;
- c. *Lifelong learning and upskilling* - Providing continuous skills development to enable residents to adapt to an evolving job market. Actions such as "greater access to digital literacy and advanced IT skills" are recommended that supports residents' adaptability in an ever-increasing digital world;
- d. *Collaboration and community engagement* –This theme seeks to facilitate the development of partnership delivery, whilst recognising the strengths of community-driven skills programmes. Actions include bringing together diverse organisations such as education establishments, local employers and local government to create partnerships that are greater than the sum of their parts, whilst also engaging effectively with communities to identify skills gaps and training opportunities;
- e. *Inclusive growth* – Providing equality of access to skills provision, with targeted support for vulnerable and marginalised priority groups is a key theme for this Council.

The action plan identifies two actions under this theme including “targeted initiatives for individuals facing barrier to employment such as NEETs (young people Not in Education, Employment, or Training”;

- f. *Business and entrepreneurship* – This theme seeks to foster entrepreneurship and support businesses with access to resources with the right skills to succeed and grow. There are four actions linked with this theme such as the development and promotion of “entrepreneurial activity in the New Forest including support and resources for starting a business”; and
- g. *Monitoring and Evaluation* – The final theme seeks to embed assessment and reporting of progress of the delivery of the Action Plan to ensure continuous improvement and alignment with strategic goals. Actions linked to this theme include “the establishment of clear metrics and indicators”.

16. The NFSAP, in its Appendix One, also identifies approaches that will break down barriers to skills provision for those priority groups within our communities where specific measures are merited, maximising opportunities for a broad cross section of New Forest residents.

## **Delivering the Skills Action Plan**

17. The Skills Action Plan prioritises the actions across the short (1-2 years), medium (2-3 years) and long term (4+ years), with an emphasis in the short term on actions which are more readily deliverable and those required to ensure that the effectiveness of the Skills Action Plan is monitored in future years.
18. The Skills Action Plan specifically recommends the setting up of a New Forest Skills Group to coordinate the delivery of skills training across the New Forest. The recommendation to form such a Group has gained support from a number of partners operating across the New Forest and it is recognised that the success of the NFSAP is dependent on effective collaboration and shared responsibility across these partners. To resource this Group in the first instance, it is proposed that NFDC initially chairs. Although it is envisaged that this group will predominantly be attended by officers across the partners, the Portfolio Holder for Planning and Economy will be invited to attend given their wider skills remit.

## **Next Steps**

19. If there is ultimately agreement to adopt the Skills Action Plan in accordance with the recommendations of this report, the next steps

will be the setting up of a New Forest Skills Group which will be tasked with coordinating existing and future skills delivery within the New Forest, the delivery of the actions set out in the NFSAP (including identifying funding opportunities as appropriate) and monitoring progress and outcomes.

20. It will also be important to ensure that skills delivery is coordinated, where appropriate, with wider sub-regional and national skills priorities to maximise external funding opportunities.

### **Corporate plan priorities**

21. The NFSAP directly supports the Councils Corporate Plan Priorities themes of People, Place and Prosperity. The NFSAP vision captures this synergy through the creation of *"A skilled, resilient workforce for the New Forest – driving inclusive, nature positive growth through place-based skills planning"*.
22. Focusing on individual priorities from a people theme perspective the NFSAP empowers residents to lead more fulfilling lives, as well as supporting those in the community that are most in need through its supports of priority groups such as NEETs.
23. In terms of the place theme the NFSAP will protect the New Forest climate, coast and natural world, through its focus on skills in sectors such as conservation, land management and renewable technologies, supporting a nature positive transition to a low carbon economy.
24. Finally, the NFSAP aligns with the prosperity theme through its ability to champion skills and access to job opportunities for residents across the District.

### **Options appraisal**

25. The NFSAP was prepared to address a significant gap in documenting the existing skills challenges and opportunities in the New Forest District and identifying an appropriate response in the form of a series of objectives and actions to address these.
26. Not undertaking this work would fail to provide a robust basis for taking a more coordinated and proactive approach to skills delivery in the future. This is particularly important in considering the opportunities and needs arising from the delivery of the Solent Freeport.
27. The Place & Sustainability Overview and Scrutiny Panel considered the basis of this report at its meeting on 19 June 2025. The Panel

supported the recommendations set out in this report. Overall, the Panel welcomed the report and raised the following observations:

- Concern over the availability of future funding.
- Transport issues for employees.
- The raising of expectations due to the Freeport not turning out to be the employment centre which was promised.
- Concern that the action plan concentrated on the Freeport and its surrounding area only and did not cover the whole of the District.

### **Consultation undertaken**

28. As part of the development of the NFSAP significant engagement and consultation has taken place with a range of stakeholders. This informed the evidence base, priorities, outputs, outcomes and delivery actions. Engagement and consultation were fundamental to the production of a plan that recognises need, whilst at the same time provides pragmatic and realistic solutions to address it.
29. Examples of stakeholders engaged and consulted with include education and skills providers, Hampshire County Council, business representative organisations and youth and community groups. Further detail on engagement and consultation can be found in section four of the NFSAP.

### **Financial and resource implications**

30. The production of the NFSAP was funded externally from the 2022 – 2025 UK Shared Prosperity Fund and its adoption as part of this governance process creates no financial implications.
31. The delivery of the NFSAP will be dependent on securing external funding for some actions. The NFSAP will help to support future bids for funding by providing the necessary context, evidence and commitment from key stakeholders.

### **Legal implications**

32. None

### **Risk assessment**

33. There are no risks associated with the subject of this decision paper, however as the implementation of the plan moves forward risk and issues logs will be employed as best practice management of standalone interventions.

## **Environmental / Climate and nature implications**

34. There are no environmental/climate and nature implications directly related to the adoption of the Skills Action Plan. In seeking to deliver the actions identified, consideration will be given to the design of interventions to ensure that opportunities are taken to enable resilience to climate change and protect and enhance the natural world.

## **Equalities implications**

35. The NFSAP is inclusive in its approach to delivering positive outcomes for residents of the New Forest District. Whilst it does set out priority groups it aims to support the full cross section of society through the theme of inclusive growth and does not distinguish between the protected characteristics. Looking forward interventions that form part of the delivery of the NFSAP will carefully consider equality implications and where necessary will undertake equality impact assessments.

## **Crime and disorder implications**

36. None

## **Data protection / Information governance / ICT implications**

37. None

## **New Forest National Park / Cranborne Chase National Landscape implications**

38. The Skills Action Plan includes actions related to supporting economic sectors that are strongly associated with activities within the National Park and National Landscape. As such there are considered to be likely positive outcomes arising from the delivery of the Skills Action Plan.

## **Appendices:**

Appendix 1 – New Forest Skills  
Action Plan 2025 – 2030

Appendix 2 – New Forest Skills  
Technical Report 2025-2030

## **Background Papers:**

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# **New Forest Skills Action Plan 2025-2030**



New Forest District Council is grateful for the work undertaken by EKOS Consultancy in supporting the preparation of this Skills Action Plan.

Direct enquiries regarding this report should be submitted to:

Economic Development Team  
New Forest District Council  
Tel: 02380 285187  
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# Executive Summary

The New Forest Skills Action Plan (NFSAP) 2025–2030 sets out a clear, place-based strategy to ensure that all residents and businesses in the New Forest can thrive in a rapidly changing economy. Commissioned by New Forest District Council (NFDC), the plan responds to local challenges such as an ageing population, young people moving away from the area, skills shortages, and the need to transition to a low-carbon economy. It also capitalises on major opportunities, including the Solent Freeport and the redevelopment of the Fawley Power Station site.

The NFSAP aligns with NFDC’s Corporate Plan 2024–2028, which is built around the priorities of People, Place, and Prosperity:

- **People:** Supporting residents to access lifelong learning, upskilling, and employment opportunities.
- **Place:** Protecting and enhancing the New Forest’s natural capital through a nature-positive, low-carbon transition.
- **Prosperity:** Enabling inclusive economic growth and supporting local businesses to innovate and grow.

## Vision

The vision of the Skills Action Plan is to build a skilled, resilient workforce for the New Forest—driving inclusive, nature-positive growth through collaborative, place-based skills planning.

## Strategic Objectives

The NFSAP sets out four strategic objectives to deliver this vision:

### Inclusive growth

We will enable everyone in the New Forest to participate in and benefit from economic, social and environmental growth, being prepared to capitalise on emerging opportunities through entrepreneurship and with a particular focus on priority target groups to tackle inequalities in access to skills and employment.

### **A nature positive transition to a low carbon economy whilst also supporting key established sectors**

We will work with key partners to deliver key skills for conservation, land and forestry management, and renewable technologies to support a nature positive transition to a low carbon economy whilst also strengthening the workforce in key established sectors.

### **Lifelong learning and upskilling opportunities for all**

We will enable all residents to be empowered with the knowledge, skills and confidence to make informed career decisions about their education, training and career paths leading to improved employment outcomes, lifelong learning and prosperity.

### **Effective coordination of skills delivery**

We will work with key education providers to ensure a coordinated and effective skills delivery programme for the New Forest that avoids duplication and addresses gaps in provision.

## **Priority Actions**

To deliver the vision and achieve the strategic objectives the plan sets out 32 high-level actions. These will be developed over the coming months by the NFDC Economic Development Service with strategic oversight coming from the New Forest Skills Group. The group will be made up of representatives from key stakeholders in skills delivery across the New Forest.

## **Next Steps**

The immediate next step is the formation of the New Forest Skills Group, which will coordinate the implementation of the action plan. This group will work collaboratively with partners across the public, private, education, and voluntary sectors to:

- Align skills investment with local priorities.
- Coordinate joint initiatives, including targeted grant funding and employer engagement.
- Support the development of the new Local Plan and ensure skills planning is embedded in wider regeneration and infrastructure strategies.

The NFSAP will be regularly monitored and evaluated to ensure it remains responsive to local needs and delivers measurable impact.

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# 1 Background

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## 1.1 Why This Research Was Commissioned

New Forest District Council (NFDC) commissioned this research in 2024 to more fully understand the local skills landscape. With new opportunities and challenges emerging, especially linked to the Solent Freeport, it became clear that a more detailed and localised approach to skills planning was needed.

The Freeport is expected to bring major investment and job creation to the region, particularly in the New Forest area, which makes up around 70% of the Freeport's tax base. However, there are concerns that existing regional skills strategies may not fully address the unique challenges faced by the New Forest, such as:

- Isolated rural communities
- Poor public transport
- An older-than-average population
- High cost of living
- Difficulty retaining young people
- A large number of small businesses and self-employed workers

NFDC wanted to ensure that future skills programmes are tailored to help address these local realities. They asked EKOS (an independent consultancy specialising in economic and social research) to gather evidence, speak with local employers and education providers, and assess whether current plans will meet the area's needs. The goal is to shape a more effective, inclusive, and place-based approach to skills development that supports both residents and businesses in the New Forest.

## 1.2 Developing the NFSAP

Our Skills Action Plan for the New Forest (NFSAP) represents New Forest District Council's (NFDC) and local partners' commitment to collaborative working across the New Forest. It embeds an evidence-based approach to skills planning, investment, and delivery that is closely aligned with the needs of employers and the local economy.

The NFSAP development was managed by NFDC in collaboration with a New Forest research skills advisory group (NFSAG) that included the New Forest National Park Authority (NFNPA), Brockenhurst College, Totton College, Community First, Solent Business and Skills Solutions, Hampshire Chamber of Commerce, Hampshire County Council, Youth Options, Solent University, and Southampton City Council.

The plan is evidence-based, drawing on the most recent skills data, built up from existing official datasets including Office for National Statistics, Annual Population Survey, Business Register and Employment Survey, UK Business Count, Census 2021, and Lightcast job postings data.

Following an initial workshop with the NFSAG, consultations were conducted with more than 30 regional stakeholders representing the main institutions and sectors engaged within the New Forest economy and skills system. An online survey with regional employers gathered a further 65 responses. Two focus groups with students from Brockenhurst College and Totton College were also held. A final workshop was hosted with the NFSAG to test the findings and gather feedback to refine the outline plan.

Further details of the research and engagement undertaken to inform this Skills Action Plan is set out in the accompanying Technical Report.

## 2 Context

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### 2.1 New Forest Economy and Labour Market

This section draws on data analysis and intelligence detailed in the accompanying Technical Report to highlight the key economic and labour market issues across the New Forest. The key findings suggest:

**Ageing population & workforce decline:** The New Forest's working-age (aged 16-64) population is shrinking, with projections suggesting a 10% contraction by 2043 if observed trends continue into the future. This potential demographic shift poses significant challenges for the vibrancy and sustainability of the local economy.

**Jobs are often lower paid & more part-time work:** The local job market is heavily concentrated in lower-paid foundational and service sectors, with health and accommodation each accounting for 11% of employment. While part-time roles align with the New Forest's strengths in tourism and the rural economy, part-time employment levels are higher than the national average across most sectors.

**Decline in key industries:** Employment in manufacturing has fallen by 14% and construction by 17%, despite their importance to the local economy and the transition to net-zero. Ensuring that skills pathways support both replacement demand and future workforce needs in these sectors is critical.

**Job demand:** Current jobs demand continues to be in lower-paid foundational and service sectors with key employers being NHS, recruiters for teaching assistants (particularly SEN), chefs, care workers, and cleaners

**Rising unemployment & economic strain:** There is an increasing reliance on unemployment-related benefits in the New Forest which has been most pronounced in areas with existing deprivation, such as Totton and Eling, and Hythe and Dibden.

**Earnings & gender pay gap:** Wages in the New Forest are affected by higher rates of part-time and lower-qualified work, particularly among women. In 2024, the gross weekly median pay for full-time workers in the New Forest was £668, significantly below the national average of £732. Men earned £801 per week, while women earned £594, marking a £207 weekly pay gap. This gender pay gap has widened since 2014 when the gap stood at £173 per week.

## 2.2 National and Regional Policy

A review of national and regional strategies and policy outlines the operating environment in which the NFSAP has been developed. Table 2.1, below, provides an overview of the main documents considered to support development of the plan.

**Table 2.1: Policy and strategic documents (grouped by level)**

### National Policy

Organisation	Document(s)
UK Government	<ul style="list-style-type: none"> <li>- English Devolution White Paper</li> <li>- UK Government Plan for Change</li> <li>- Get Britain Working</li> <li>- Apprenticeship Funding Rules: August 2024 – July 2025</li> </ul>
Skills England	Driving Growth and Widening Opportunities
Local Government Association	Devolution and Local Government Reorganisation Hub

### County / Sub-Regional Policy

Organisation	Document(s)
Hampshire County Council	<ul style="list-style-type: none"> <li>- Hampshire Economic Strategy</li> <li>- Hampshire Skills Strategy - Scope</li> </ul>
Hampshire Chamber of Commerce	Solent Local Skills Improvement Plan (LSIP)
Solent Local Enterprise Partnership (LEP)	Solent Skills Action Plan & Local Skills Report
Solent Growth Partnership	Solent Growth & Prosperity Strategy
Solent Freeport	Solent Freeport

## District Policy

Organisation	Document(s)
New Forest District Council	<ul style="list-style-type: none"><li>- Corporate Plan 2024–2028</li><li>- Transformation Strategy 2024–2028 (Future New Forest – Transforming Tomorrow, Together)</li><li>- Local Plan 2016-2036 Part One (adopted July 2020)</li></ul>

## 2.3 Hampshire overview

Economic development strategies for Hampshire and the Solent highlight key growth sectors driving regional prosperity, including marine and maritime manufacturing, digital, and creative industries. Notably, IT and construction are forecast to have the largest increase in skills demand across Hampshire and the Solent, fuelled by rapid digitisation and evolving infrastructure needs.

A major strength of the region is its robust skills and education ecosystem, with 27 Education and Skills Funding Agency (ESFA) providers delivering post-16 education and training across Hampshire.

## Hampshire and Solent wide growth barriers

Several short- and long-term barriers to economic growth across the county are identified in the Hampshire and Solent wide studies and strategies:

<u>Short term challenges</u>	<u>Long term challenges</u>
<ul style="list-style-type: none"><li>• Post-COVID labour market recovery</li></ul>	<ul style="list-style-type: none"><li>• Ageing population and shrinking workforce.</li></ul>



<ul style="list-style-type: none"> <li>• Ongoing skills shortages and unfilled vacancies</li> <li>• Weak demand for commercial property, particularly office space</li> <li>• Cost-of-living pressures on households and businesses</li> <li>• Rising inflation</li> <li>• Brexit-related trade disruptions</li> </ul>	<ul style="list-style-type: none"> <li>• Declining in-migration, both from within the UK and abroad.</li> <li>• Shortages in construction, IT, and green economy roles.</li> <li>• Climate change and infrastructure vulnerabilities (including increased flooding)</li> <li>• Persistent skills gaps and slow workforce development</li> </ul>
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Of specific relevance to the New Forest, are the following issues:

### **Skills gaps and mismatch**

The New Forest faces acute skills shortages in both traditional and emerging sectors. Long-established industries such as hospitality and tourism, agriculture, and land-based services continue to struggle with workforce shortages due to an ageing population and youth outmigration. Newer sectors, such as renewable energy, decarbonisation, and engineering, require a more adaptable, tech-enabled skill base. These mismatches must be addressed to ensure the area can meet future labour market demands.

### **Housing affordability and availability**

The lack of affordable housing in the New Forest, particularly in relation to local wage levels, hinders the area's ability to attract and retain workers. This contributes to youth outmigration and exacerbates workforce shortages across multiple sectors, impacting long-term economic sustainability.

### **Connectivity and infrastructure**

As a rural area, the New Forest struggles with limited transport links and digital connectivity. Poor access to employment, training, and education, especially in isolated communities, reduces productivity and creates barriers for both individuals and businesses. Investment in public and digital infrastructure is essential to unlock economic potential.

### **Transition to a Low-Carbon Economy**

With its strong land-based economy and environmental assets, the New Forest is well positioned to lead on nature-positive and low-carbon growth. However, the transition will require targeted upskilling and reskilling, particularly in hospitality and tourism, agriculture, and construction, to meet the needs of a greener economy and reduce emissions across sectors. Targeted support (for example, through the UK Government's 'Skills for Careers' campaign) will be required for workers in high-carbon sectors to upskill and reskill as part of the transition to a low-carbon economy.

### **Inequality and regional disparities**

Marginalised groups, including young people not in education or training (NEETs), older workers and women entering or re-entering the workforce, face barriers to employment and training in the New Forest. Tackling these disparities through inclusive growth strategies and community-based skills provision is a core aim of the NFSAP.

### **Business Investment and Innovation**

Stimulating investment and encouraging innovation are vital for the New Forest's economic resilience. Key opportunities lie in renewable energy, tourism, and agriculture. The Solent Freeport offers further potential to attract high-value businesses, but the region must also invest in workforce development to meet growing sector demands.

## **Hampshire wide skills priorities**

In response, national and regional strategies have identified the following skills priorities:

- Upskilling and reskilling the workforce
- Expanding education and training access
- Stronger collaboration between businesses, educators, and local authorities
- Better career awareness among young people
- Removing systemic barriers to participation in training and employment

## A place-based response for the New Forest

While these strategic priorities set the direction for Hampshire and the wider Solent region, the New Forest requires a more tailored place-based response, directly addressing the area's specific economic, social, and environmental needs. This includes targeted investment in local skills pathways, support for priority sectors, and inclusive, community-led strategies to ensure all residents and businesses benefit from future growth.

## Solent Freeport

The Solent Freeport was designated by the UK Government in December 2022. Freeports were developed as site-specific hubs for global trade, investment, and innovation in the UK to encourage business growth and opportunities, supporting the regional economy. The Solent Freeport is one of 12 Freeports within the UK.

Within the Freeport sites, businesses can benefit from advantages such as:

- Tax reliefs: business rates relief and enhanced capital allowances
- Customs benefits: simplified customs procedures

It should be noted that whilst the Solent Freeport designation includes sites across a wide geography which also experience their own unique skills challenges and demand, the majority of sites are within New Forest District – Figure 2.1.

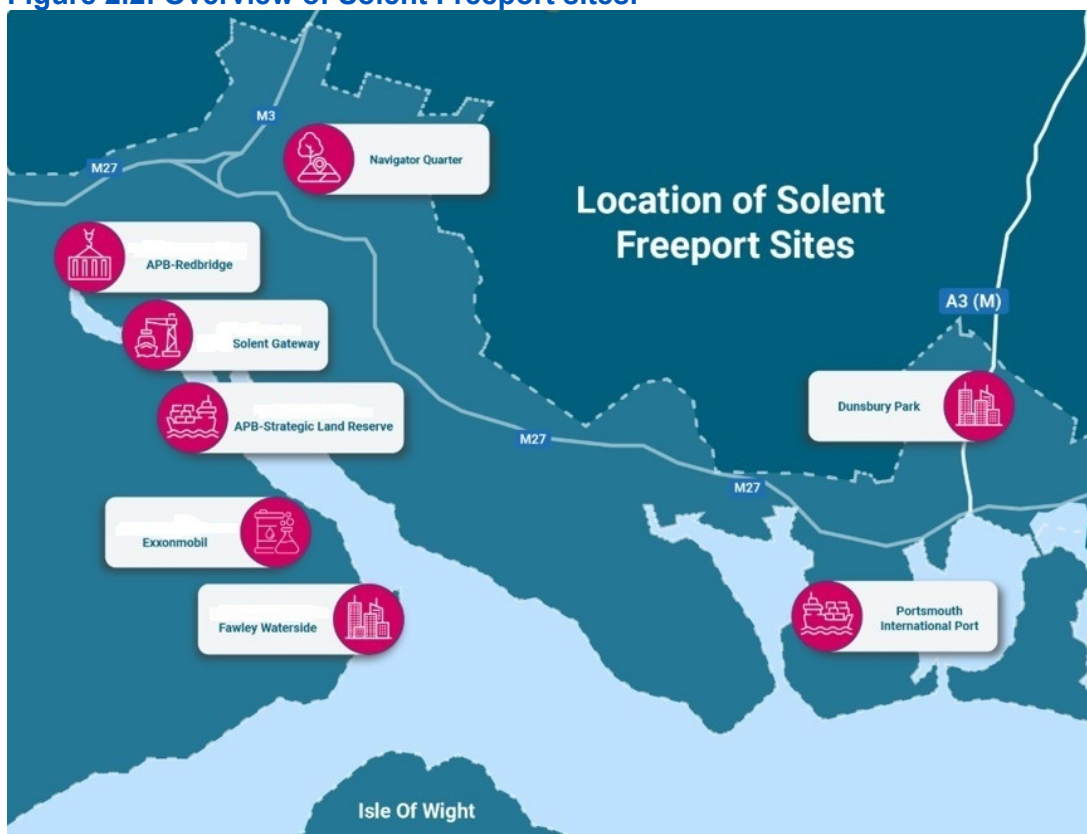
### Figure 2.1: Solent Freeport Area



Source: Solent Local Skills Improvement Plan.

Located on the south coast, the Solent Freeport has a strong geographical advantage which will be used to strengthen trading relationships and drive economic growth. There is also a strong focus on sustainable development, innovation and decarbonisation.

**Figure 2.2: Overview of Solent Freeport sites.**



The Solent Freeport has a number of target sectors for growth and opportunity, including:

- Port activities and logistics
- Marine manufacturing and technology
- Advanced manufacturing
- Clean growth and decarbonisation

It is important that the NFSAP acknowledges the sectoral opportunities that can be realised, and addresses any skills challenges, gaps or shortages – whilst supporting residents and businesses in the New Forest to leverage maximum benefit from the opportunity.

## **Devolution Deal and Local Government Reorganisation**

In December 2024, the Ministry of Housing, Communities and Local Government published the English Devolution White Paper, outlining their plans to reform local government. This focused on mayoral devolution and local government reorganisation, developing strategic authorities to replace the existing two-tier system of district and county councils. Devolution aims to enable strategic authorities to make necessary and strategic decisions that benefit their area and population by transferring powers and funding from national to local government and changing how these powers and funding are organised between councils.

The proposed devolution deal for Hampshire and the Solent aims to transfer certain powers and responsibilities from central government to a new Mayoral Combined County Authority (MCCA), encompassing Hampshire County Council, Portsmouth City Council, Isle of Wight Council, and Southampton City Council. This proposed restructuring is expected to impact local governance and service delivery, including the development and implementation of skills planning in the New Forest. The District Council will continue to proactively engage in securing the best possible outcome for the New Forest through any future Devolution and Local Government Reorganisation deal.

## **New Forest District Council Corporate Plan**

The NFDC Corporate Plan 2024-2028 focuses on people, place, and prosperity and aims to ensure that the council invest in their people and services to meet customer needs, protect the council's financial position, and embed sustainability.

Within the prosperity priority, the Corporate Plan aims to promote a strong local economy via partnerships, investment, and increasing skills and employment opportunities. It acknowledges that

there are challenges within the New Forest with a need for the Council to ensure that residents of working age have the necessary skills to access employment within the area.

Additionally, the Plan highlights that there are opportunities arising from the Solent Freeport to develop green skills provision across the wider New Forest, with associated benefits for tourism.

To achieve this, the plan seeks to 'champion skills and access to job opportunities' by:

- Developing an employment and skills strategy informed by skills assessments
- Working with partners to support residents' access to employment opportunities and tackle barriers to employment
- Encouraging employment and skills training to address emerging opportunities and local skills needs, aligned to Solent Freeport proposals, the green agenda and key sectors within the New Forest (marine, tourism, land and nature-based sector).

## 2.4 Skills Strategies

### National Skills Planning

As of March 2025, England's Skills Strategy encompasses several key initiatives aimed at enhancing technical education, addressing skills shortages and promoting lifelong learning:

- **T Levels:** Introduced in 2020, T Levels are two-year technical courses designed for students aged 16-18, developed in collaboration with employers to align with industry needs. They combine classroom learning with substantial industry placements, preparing students for skilled employment, Higher Education, or apprenticeships.
- **Skills for Life:** This national strategy focuses on improving adult skills by offering free education and training in areas such as digital literacy, numeracy, and transferable skills. It includes various programs like Skills Bootcamps, apprenticeships, and vocational qualifications, aiming to enhance employability and support career progression.
- **Skills England:** Skills England is a planned executive agency intended to replace the Institute for Apprenticeships and Technical Education. Its goal is to increase flexibility in skills training, address regional skills shortages, and optimise the use of the apprenticeship levy. The agency's creation responds to the significant rise in skills shortages, which accounted for 36% of job vacancies between 2017 and 2022.

Within their 2024/25 apprenticeship funding rules, the UK Government introduced a range of changes to apprenticeships to increase the number of apprentices able to qualify each year and boost economic growth.

This included:

- Greater flexibility in English and Maths requirements for apprenticeships – extending flexibilities for apprentices with learning difficulties or disabilities, but do not have an Education, Health and Care Plan
- Reducing the administrative requirements for learning support – reviews will now occur every three months, rather than monthly, and assessments for learning support can happen at any time throughout the apprenticeship
- Reducing the administrative requirements relating to onboarding an apprentice and monitoring progress – integrating the initial assessment with the development of the training plan to reduce the number of documents needing to be developed, reviewed and signed by employers and providers. Employers also do not need to sign off on each progress review.

These initiatives collectively aim to create a more responsive and efficient skills development system in England, aligning education and training with the evolving demands of the economy and supporting individuals in achieving their career aspirations.

### **Get Britain Working**

The Get Britain Working initiative, introduced by the UK Government in late 2024, aims to tackle economic inactivity and boost employment across the country. Backed by a £240 million investment, the programme focuses on addressing the root causes of worklessness by integrating employment support with health and social care services at the local level.

Key components include the Connect to Work scheme, which offers voluntary employment support to individuals with disabilities or health conditions, and the development of tailored local plans to reduce economic inactivity. The overarching goal is to create an inclusive labour market where everyone has the opportunity to participate and progress in work.

The Get Britain Working initiative could offer significant opportunities for the New Forest, where the focus on integrating employment support with health and social care services can help address barriers to work in rural areas.

Local skills planning should ensure that people facing economic inactivity can access the support and training needed to secure employment, contributing to a more inclusive local workforce.



## Skills England: Driving Growth and Widening Opportunities

The Skills England report: Driving Growth and Widening Opportunities, published in September 2024, outlines the key skills challenges limiting economic growth and opportunities across England. As the inaugural publication from the newly established Skills England, the report identifies critical skills shortages, particularly in sectors such as health and social care, construction, and clean energy.

It also highlights the need for a more coordinated and flexible skills system to meet the demands of the next decade. The report serves as a foundational document for Skills England's mission to align education and training with economic needs, reduce regional disparities, and support the government's broader industrial strategy.

The report highlights critical skill shortages across key sectors, such as health and social care and clean energy, which directly impacts the New Forest's economy. Skills England's focus on a coordinated and flexible skills system can support the New Forest's efforts to address these gaps, ensuring that the local workforce has the necessary skills to meet the evolving demands of the area's industries, particularly in the transition to a low-carbon economy.

## Lifelong Learning Entitlement

The Lifelong Learning Entitlement (LLE) is a key reform in England that aims to give individuals greater flexibility and control over their learning and career development. Launched in 2025, it provides adults with a loan entitlement equivalent to four years of post-18 education (around £37,000), which can be used over their lifetime for full or modular study at levels 4 to 6. This supports reskilling and upskilling, making it easier for people to adapt to changing labour market demands, access higher education in smaller chunks, and pursue new opportunities throughout their careers.

The LLE reform will seek to provide adults in the New Forest with greater opportunities for reskilling and upskilling. With flexible access to higher education and training, this initiative will enable individuals to adapt to the changing demands of emerging jobs in clean energy and decarbonisation technology, ultimately enhancing workforce resilience and enabling career progression across the region.

# 3 Action Plan

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## 3.1 Vision

*“To build a skilled, resilient workforce for the New Forest—driving inclusive, nature-positive growth through collaborative, place-based skills planning”.*

Our vision is to build a skilled, resilient workforce that reflects the unique character of the New Forest - supporting sustainable, inclusive growth through a place-based approach to skills planning. By embedding nature-positive solutions and preparing for a low-carbon future, we will enable local people and businesses to thrive while protecting the area’s natural environment.

## 3.2 Skills objectives for the New Forest

Based on the New Forest specific opportunities and challenges identified, and the wider policy context, four key objectives for the Skills Action Plan are identified:

### **Inclusive growth**

We will enable everyone in the New Forest to participate in and benefit from economic, social and environmental growth, being prepared to capitalise on emerging opportunities through entrepreneurship and with a particular focus on priority target groups to tackle inequalities in access to skills and employment

### **A nature positive transition to a low carbon economy whilst also supporting key established sectors**

We will work with key partners to deliver key skills for conservation, land and forestry management, and renewable technologies to support a nature positive transition to a low carbon economy whilst also strengthening the workforce in key established sectors

### **Lifelong learning and upskilling opportunities for all**

We will enable all residents to be empowered with the knowledge, skills and confidence to make informed career decisions about their education, training and career paths leading to improved employment outcomes, lifelong learning and prosperity.

### **Effective coordination of skills delivery**

We will work with key education providers to ensure a coordinated and effective skills delivery programme for the New Forest that avoids duplication and addresses gaps in provision

### 3.3 Priority actions

The NFSAP is a strategic document and the action list whilst directly links to seven themes provides high level proposals in terms of next steps. The development of specific interventions to address challenges, support opportunities and achieve the strategic objectives of the plan will be led by NFDC Economic Development Service as part of it's the yearly service plan cycle. However, to oversee and coordinate this work, a New Forest Skills Group will be set up including representatives of key stakeholders in skills deliver across the New Forest. This collaboration is critical in ensuring the actions of the NFSAP are delivered.

Action	Theme	Timeframe
	<b>Theme 1: Aligning Skills with Emerging Opportunities</b>	
Actions	<ul style="list-style-type: none"><li>Offer specialised courses and certifications in renewable energy (solar, wind, etc.), green technologies, and sustainable practices</li></ul>	2026/27
	<ul style="list-style-type: none"><li>Develop and promote training programmes (both apprenticeships and work-based training opportunities) that focus on trade, innovation, and job creation within the Solent Freeport</li></ul>	2026/27
	<ul style="list-style-type: none"><li>Encourage training pathways in energy efficiency, waste reduction, and low-carbon technologies</li></ul>	2025/26
	<ul style="list-style-type: none"><li>Implement training and development programmes focused on carbon reduction strategies, nature-based solutions, and sustainable land management practices.</li></ul>	2026/27
	<b>Theme 2: Supporting Established Sectors</b>	T
Actions	<ul style="list-style-type: none"><li>Develop and expand training programmes in customer service, hospitality management, and tourism, with a focus on improving visitor experiences and supporting sustainable tourism practices.</li></ul>	2025/26
	<ul style="list-style-type: none"><li>Provide targeted training programmes for healthcare professionals and social care workers, addressing the growing demand for these services.</li></ul>	2025/26
	<ul style="list-style-type: none"><li>Expand training opportunities (both apprenticeships and work-based training opportunities) in construction trades such as plumbing, electrics, carpentry, and plastering, as well as other technical skills needed for local infrastructure projects.</li></ul>	2025
	<ul style="list-style-type: none"><li>Create courses on renewable energy system installation and maintenance (e.g., solar panels, wind turbines).</li></ul>	2026/27
	<ul style="list-style-type: none"><li>Offer training in Geographic Information Systems (GIS), remote sensing, and emerging technologies to support forest and land management.</li></ul>	2026/27

Action	Theme	Timeframe
	<ul style="list-style-type: none"> <li>Encourage further development in wildlife management and sustainable forestry practices.</li> <li>Provide training pathways in advanced manufacturing, engineering, and marine industries, focusing on skills in shipbuilding, marine engineering, and production of marine equipment.</li> <li>Develop career progression training and work-based learning opportunities to ensure resilience in the retail sector.</li> <li>Create pathways for career advancement in retail management and sales.</li> </ul>	2025/26 2026/27 2025/26 2026/27
	<b>Theme 3: Lifelong Learning and Upskilling</b>	
<b>Actions</b>	<ul style="list-style-type: none"> <li>Increase access to adult education programmes, including literacy and numeracy, vocational qualifications, and life skills courses to support career progression and adaptability.</li> <li>Ensure access to courses on digital literacy, programming, and advanced IT skills to prepare the workforce for digital roles in the tech-driven economy. Offer certifications in areas such as cybersecurity, data analysis, and cloud computing.</li> <li>Develop short, flexible training courses</li> <li>Increase the number, awareness and accessibility of local apprenticeships</li> </ul>	2025/26 2025/26 2025/26 2025/27
	<b>Theme 4: Collaboration and Community Engagement</b>	
<b>Actions</b>	<ul style="list-style-type: none"> <li>Strengthen collaboration and alignment around skills between local employers, schools, colleges, training providers, local authorities, businesses, and community organisations to shape curriculum, offer placements, and influence strategic skills planning.</li> <li>Engage the community to assess skills gaps and identify training opportunities, ensuring the workforce meets the specific needs of local businesses. Encourage consultation through town halls, surveys, and community meetings.</li> </ul>	2026-27 2025
	<b>Theme 5: Inclusive Growth</b>	
	<ul style="list-style-type: none"> <li>Develop targeted initiatives for individuals facing barriers to employment, including NEETs (Not in Education, Employment, or Training), the 50+, people living with disabilities, and ethnic minorities.</li> <li>Promote gender equality by ensuring women have equal access to training programmes and resources that lead to career and self-employment opportunities. Develop mentorship programmes for women in male-dominated sectors.</li> <li>Advocate for improved transport accessibility of students and apprentices to training and employment</li> </ul>	2026/27 2025/26 2025/27

Action	Theme	Timeframe
	<b>Theme 6: Business and Entrepreneurship</b>	
<b>Actions</b>	<ul style="list-style-type: none"> <li>Promote entrepreneurial activity in the New Forest by providing access to financial support, grants, and resources for starting a business.</li> </ul>	2026/27
	<ul style="list-style-type: none"> <li>Develop networking opportunities and business incubators, particularly for excluded groups (young people, women, NEETs, and career changers).</li> </ul>	2025/26
	<ul style="list-style-type: none"> <li>Offer courses in business planning, financial management, and marketing to equip local entrepreneurs with the skills to grow and manage their businesses.</li> </ul>	2026/27
	<ul style="list-style-type: none"> <li>Create programmes focused on leadership development, team management, and effective communication to build stronger local leaders and improve business management.</li> </ul>	2026/27
	<ul style="list-style-type: none"> <li>Mitigation and support for businesses who may lose people as part of the upskilling and reskilling.</li> </ul>	2029+
	<b>Theme 7: Monitoring and Evaluation</b>	
	<ul style="list-style-type: none"> <li>Establish clear metrics and indicators</li> </ul>	2025/26
	<ul style="list-style-type: none"> <li>Set up a system for collecting quantitative and qualitative data regularly from skills group partners to monitor programmes performance.</li> </ul>	2025
	<ul style="list-style-type: none"> <li>Conduct periodic evaluations</li> </ul>	Every 3 years
	<ul style="list-style-type: none"> <li>Engage stakeholders in the evaluation process</li> </ul>	2026/27
	<ul style="list-style-type: none"> <li>Use technology for real-time monitoring</li> </ul>	2027/27
	<ul style="list-style-type: none"> <li>Assess long-term impact</li> </ul>	Every 5 years
	<ul style="list-style-type: none"> <li>Continuous improvement and adaptation</li> </ul>	2026/27
	<ul style="list-style-type: none"> <li>Develop an annual report detailing the achievements, challenges, and lessons learned from the monitoring and evaluation process</li> </ul>	Yearly

## 3.4 Priority Groups

Reflecting the key objective of this Council to support inclusive growth across the New Forest, there is a need for a particular focus on priority target groups to tackle inequalities in access to skills and employment. Five key priority target groups are identified which are:

- Supporting women to enter or re-enter the workforce
- Young people, particularly those not in education, employment or training (NEETs)
- Supporting people aged 50+ to re-enter or remain in the workforce
- Supporting job changers to reskill and upskill to meet emerging skills needs
- Support self-employment in the New Forest

Appendix One provides details of how the priority actions identified will help to address these target groups.

# 4 Delivering the Plan

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## 4.1 Funding the Plan

In the New Forest, skills development is supported through various funding initiatives aimed at enhancing workforce capabilities and supporting local businesses. Key funding sources include the Apprenticeship Levy (soon to become the [Flexible Growth and Skills Levy](#)), [Adult Skills Fund](#) (AEB Skills Bootcamps), UK Shared Prosperity Fund (UKSPF), the New Forest Apprenticeship and Skills Hub, Local Skills Improvement Plans and Local Skills Improvement Fund (LSIF), Further Education and Higher Education funding and community and charitable grants. The Council will continue to advocate for funding incentives for training providers and employers offering skills development in priority sectors.

The Solent Freeport is poised to significantly enhance skills development in the region through several targeted initiatives. The Solent Freeport allows local authorities to retain 100% of business rates growth generated within the Freeport's designated tax sites (Southampton Water, Navigator Quarter, and Dunsbury Park). These additional revenues are ring-fenced for reinvestment into the Freeport area, supporting skills development, infrastructure, innovation, and business growth. The Solent Freeport Governing Body oversees the allocation of retained business rates<sup>1</sup>. Local councils within the Freeport (including NFDC) will collaborate to decide how best to deploy these funds.

All opportunities must be mapped against the agreed actions in the NFSAP and further investigated, with specific proposals developed to secure the necessary resources. Successful delivery of the NFSAP will require targeted investment (both capital and revenue) to implement the actions – a lack of discrete funding to deliver the NFSAP will hinder progress of the Plan objectives and outcomes.

## 4.2 Implementation and Governance

While the NFDC have led the development of the NFSAP, its successful implementation is dependent on the input of wider partners. The ownership of the NFSAP must be shared by all the key regional stakeholders, led in partnership by a proposed New Forest Skills Group, under the direction of the NFDC. For the NFSAP to achieve its goals, it must be seen as a shared responsibility. In addition to the New Forest Skills Group, the regional skills groups will have a critical role to play in ensuring the actions of the NFSAP are delivered.

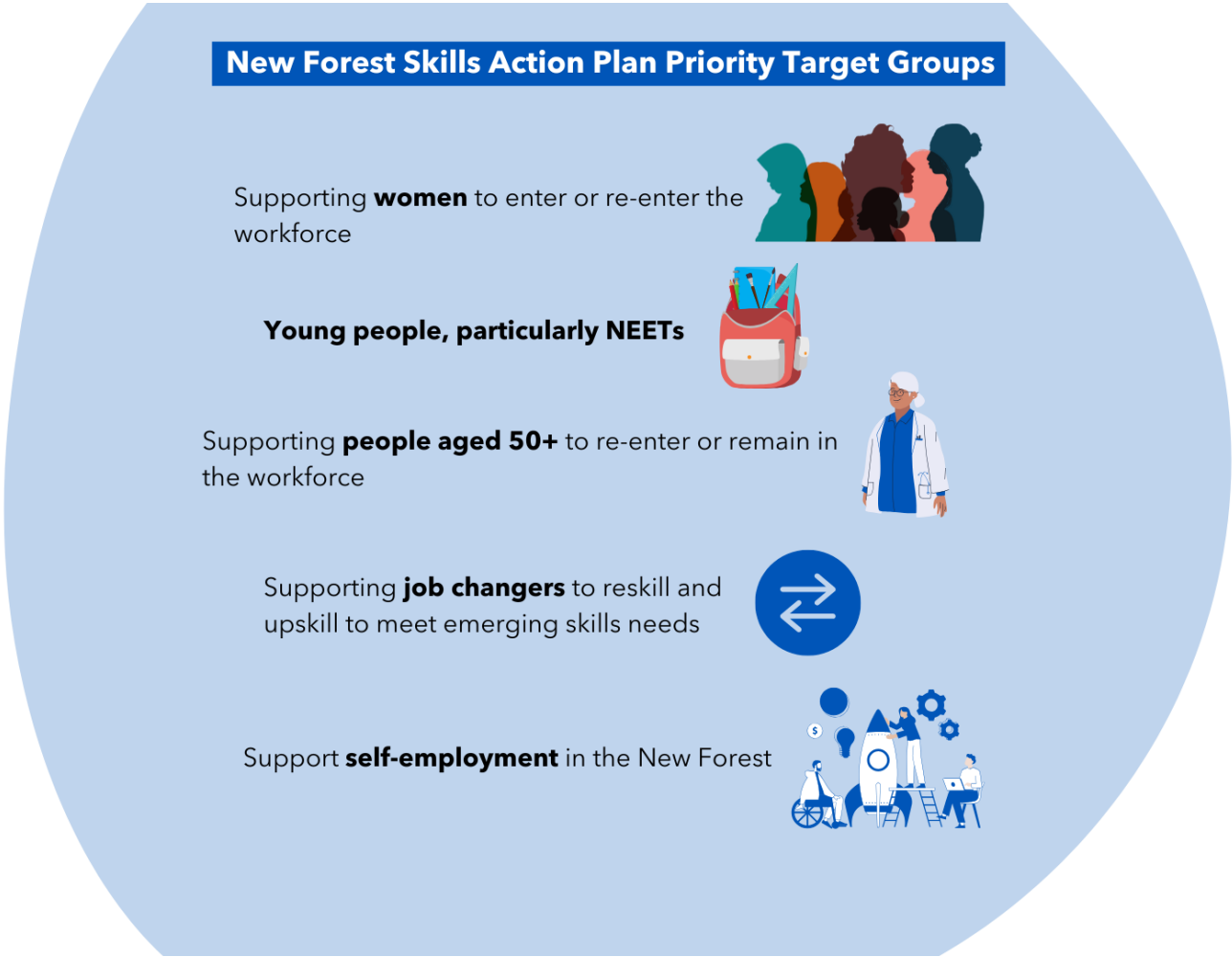
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<sup>1</sup> Solent Freeport Retained Rates Investment Committee, [Draft Terms of Reference](#), March 2022

Actions to support priority target groups

By targeting priority groups, the NFSAP will support its strategic objective of delivering inclusive growth. The following pages set out the objectives, rational and priority group specific actions.

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### Young People, particularly NEETs (Not in Education, Employment or Training)

#### Objective

Reduce the percentage of young people aged 16–18 who are Not in Education, Employment, or Training (NEET) in the New Forest.

#### Rationale

Since 2020, the percentage of Year 11 Leavers who are NEET has been increasing in the New Forest. This rise highlights the need for targeted interventions to support young people in the area.

#### Importance of supporting NEETs

##### Economic Benefits

- Increased Productivity: Engaging NEETs in education or employment boosts their productivity, contributing to the overall economy
- Reduced Public Spending: Supporting NEETs can reduce the long-term costs associated with unemployment benefits, healthcare, and social services

##### Social Inclusion

- Preventing Marginalisation: Providing opportunities for NEETs helps prevent social exclusion and marginalisation, fostering a more inclusive place to live and work
- Building Community: Engaging NEETs in community activities and programmes strengthens social cohesion and community relationships

##### Personal Development

- Skill Development: Education and training programmes help NEETs develop valuable skills, increasing their employability and career prospects
- Improved Well-being: Being engaged in productive activities can enhance mental health and overall well-being, reducing feelings of isolation and depression

##### Breaking the Cycle

- Intergenerational Impact: Helping NEETs can break the cycle of poverty and unemployment, providing better opportunities for future generations
- Positive Role Models: Successful integration of NEETs into education or employment can inspire others in similar situations to seek opportunities

##### Addressing Skills Shortages

- Meeting Labour Market Needs: Engaging NEETs in training programs can help address local skills shortages, ensuring that businesses have access to a skilled workforce.

### Young People, particularly NEETs (Not in Education, Employment or Training)

#### Skills and Training Actions

##### Mentorship Programmes

- Create mentorship opportunities between local businesses, community leaders, and young people and NEETs to provide guidance, motivation, and pathways into training or employment.

##### Youth Employment Initiatives

- Develop targeted programmes that combine work experience with formal training in high-demand sectors (e.g., renewable energy, health and social care, visitor economy).

##### Partnerships with Employers

- Build partnerships with local employers to offer apprenticeships, internships, and work-based learning specifically designed for young people and NEETs.

##### Engagement with Schools and Colleges

- Strengthen collaboration between schools, colleges, and training providers to ensure a seamless transition for young people into education, apprenticeships, or direct employment.

##### Skills and Personal Development Workshops

- Offer workshops focusing on soft skills, such as communication, teamwork, and time management, to improve employability and increase confidence.

##### Identifying Young People who are NEET or at risk of becoming NEET

- Working with schools/colleges and voluntary/third sector to identify young people who are NEET or at risk of becoming NEET to target support.

##### Effective Careers Information, Advice and Guidance

- Develop targeted outreach programmes in partnership with local schools, colleges, community groups, and employment support services to reach underrepresented groups, including young people and NEETs
- Embed careers advice within community settings (e.g. libraries, community centres, and job clubs) to improve accessibility for individuals who may not engage with traditional services
- Host regular careers fairs and skills events with a focus on inclusive participation, featuring local employers from key and emerging sectors (e.g. health and social care, hospitality & tourism, and emerging opportunities in renewables, decarbonisation, engineering etc).
- Work with employers to co-design career pathways that offer real opportunities for progression, especially for part-time, low-wage, and entry-level work

### Supporting women in the New Forest to enter or re-enter the workforce

#### Objective

Empower women in the New Forest to access training, increase their employability, and close the gender pay gap.

#### Rationale

There is a significant Gender Pay Gap in the New Forest and women are under employed. Addressing the gender pay gap remains a priority to ensure equal pay for equal work. There is a need to address career progression for women and address the gender balance of occupations by opening up opportunities especially in roles that are traditionally male sectors.

#### Importance of supporting women enter or re-enter the workforce

##### Economic Benefits

- Increased Productivity: Women bring diverse skills and perspectives, enhancing productivity and innovation in the workplace
- Boosting GDP: Higher female participation in the workforce can significantly boost the overall economy.

##### Tackle Inequality

- Gender Equality: Supporting women in the workforce promotes gender equality, ensuring that everyone has equal opportunities to succeed.
- Reducing Poverty: Employment can help lift women and their families out of poverty, improving their quality of life.

##### Personal Development

- Skill Utilisation: Women can utilise and develop their skills, leading to personal growth and career satisfaction.
- Confidence and Independence: Employment fosters confidence and financial independence, empowering women to make informed life choices.

##### Postive Role Models

- Inspiring Future Generations: Women in the workforce serve as role models, inspiring future generations to pursue their career aspirations.
- Breaking Stereotypes: Successful women in diverse roles help break down gender stereotypes and promote a more inclusive society.

##### Addressing Skills Shortages

- Diverse Talent Pool: Tapping into the female workforce will help to address skills shortages in the New Forest, ensuring businesses have access to a wider talent pool.

### Supporting women in the New Forest to enter or re-enter the workforce

#### Skills and Training Actions

##### Flexible Training Programmes:

- Develop training modules with flexible schedules (e.g., evening or weekend classes) tailored to women who may have caregiving responsibilities.

##### Digital Upskilling and Literacy Courses:

- Offer digital skills training to equip women with the technological proficiency needed to thrive in modern workplaces, especially in tech and administrative roles.

##### Women's Leadership and Career Progression Courses:

- Provide leadership development Programmes and career progression workshops that focus on empowering women to assume senior roles or entrepreneurial ventures.

##### Targeted Outreach and Support Services:

- Offer mentoring, counselling, and confidence-building services specifically aimed at women who are entering or re-entering the workforce (for example, after a career break).

##### Networking, Peer Support and Mentoring Groups:

- Facilitate networking opportunities and peer support groups for women in various sectors, especially in male-dominated industries like construction, engineering, and manufacturing. This could include mentoring programme led by local female professionals.

##### Effective Careers Information, Advice and Guidance:

- Develop targeted outreach programmes in partnership with local colleges, community groups, and employment support services to reach underrepresented groups, including women.
- Embed careers advice within community settings (e.g. libraries, community centres, and job clubs) to improve accessibility for individuals who may not engage with traditional services
- Host regular careers fairs and skills events with a focus on inclusive participation, featuring local employers from key and emerging sectors (e.g. health and social care, hospitality & tourism, and emerging opportunities in renewables, decarbonisation, engineering etc).
- Work with employers to co-design career pathways that offer real opportunities for progression, especially for part-time, low-wage, and entry-level work

### Support people aged 50+ to re-enter or remain in the workforce

#### Objective

Provide reskilling and upskilling opportunities for older workers (aged 50 and above) to address skills shortages and promote lifelong learning.

#### Rationale

Workers aged 50+ bring valuable experience and knowledge to the workforce, which can be beneficial for mentoring and training younger employees. As they make up a significant proportion of the population in the New Forest, opportunities for reskilling and upskilling should be created to address skills shortages. Supporting and valuing workers aged 50+ can lead to a more dynamic, experienced, and resilient workforce.

#### Importance of supporting people aged 50+ to re-enter or remain in the workforce

##### Experience and Skills

- **Depth of Knowledge:** Older workers bring a wealth of experience and critical thinking skills that are invaluable in many industries.
- **Technical Proficiency:** In fields requiring extensive training, such as engineering or craftsmanship (boatbuilding, chefs), older workers often possess technical skills that take years to develop.

##### Mentorship and Knowledge Transfer

- **Mentoring Younger Employees:** Older workers can mentor younger employees, sharing their knowledge and expertise, which helps in skill development and succession planning.
- **Retaining Institutional Knowledge:** They help retain valuable institutional knowledge and networks within the organisation.

##### Diverse Perspectives

- **Multigenerational Teams:** Older workers contribute to diverse, multigenerational teams, which can enhance creativity and problem-solving.
- **Balanced Decision-Making:** Their experience often leads to more balanced and informed decision-making processes.

##### Adaptability and Learning

- **Overcoming Technology Gaps:** Many older workers are willing to learn and adapt to new technologies, proving that the perceived technology gap can be bridged.
- **Continuous Learning:** They often engage in lifelong learning, staying updated with industry trends and developments.

##### Economic and Social Benefits

- **Economic Contribution:** By staying in the workforce longer, older workers contribute to the economy and can help mitigate skills shortages.
- **Social Inclusion:** Their participation in the workforce promotes social inclusion and reduces the risk of isolation.

### Support people aged 50+ to re-enter or remain in the workforce

#### Skills and Training Actions

##### Technology Training:

- Offer training on digital tools, online platforms, and modern technologies to help older workers bridge the digital divide and remain competitive in the job market.

##### Lifelong Learning Programmes:

- Establish ongoing educational opportunities for older workers to stay updated on industry developments, particularly in sectors such as healthcare, retail, and renewable energy.

##### Flexible Work Models and Part-time Opportunities:

- Collaborate with employers to design roles that cater to older workers, including part-time or flexible hours to accommodate diverse needs.

##### Skills Transfer Workshops:

- Facilitate workshops where older workers can learn how to transfer their knowledge to younger generations, fostering intergenerational learning and mentorship.

##### Health and Wellbeing Training:

- Provide wellness and resilience training for older workers to ensure they are physically and mentally prepared for the demands of their roles.

##### Effective Careers Information, Advice and Guidance:

- Develop targeted outreach programmes in partnership with local colleges, community groups, and employment support services to reach underrepresented groups, including people aged 50+.
- Embed careers advice within community settings (e.g. libraries, community centres, and job clubs) to improve accessibility for individuals who may not engage with traditional services.
- Host regular careers fairs and skills events with a focus on inclusive participation, featuring local employers from key and emerging sectors (e.g. health and social care, hospitality & tourism, and emerging opportunities in renewables, decarbonisation, engineering etc).
- Work with employers to co-design career pathways that offer real opportunities for progression, especially for part-time and low-wage work.



### Support for job changers to reskill and upskill to meet emerging skills needs

#### Objective

Enable job changers to develop new skills and meet emerging demands in the New Forest economy.

#### Rationale

Job changers will play a vital role in the New Forest's economy as forecast skills shortages and skills gaps increase due to changing demographics, ageing populations and the growth of automation and new technology.

#### Importance of supporting job changers

##### Economic Benefits

- Reskilling helps fill critical skill gaps, enabling businesses to operate more efficiently and innovate. This, in turn, drives economic growth by increasing productivity and competitiveness

##### Addressing Skills Gaps

- Filling Talent Gaps: Instead of recruiting new employees, which can be costly and time-consuming, businesses can reskill their existing workforce to fill critical skill gaps. This approach is often more efficient and helps retain valuable employee
- Filling Vacancies: Job changers can fill critical vacancies in sectors experiencing skills shortages, ensuring that local businesses have the talent they need to thrive.
- Up-to-Date Skills: They often bring new skills and perspectives from their previous roles, which can be particularly valuable in rapidly evolving industries.

##### Innovation and Fresh Perspectives

- New Ideas: Job changers introduce fresh ideas and innovative approaches, which can drive business growth and development.
- Problem-Solving: Their diverse experiences enable them to approach problems from different angles, leading to more effective solutions.
- Workforce Adaptability: As businesses in the New Forest evolve due to technological advancements, reskilling ensures that the workforce can adapt to new demands. This adaptability is crucial for maintaining employment levels and reducing the risk of job displacement.

### Support for job changers to reskill and upskill to meet emerging skills needs

#### Skills and Training Actions

##### Cross-Sector Reskilling Programmes:

- Develop short-term reskilling Programmes (for example, Skills Bootcamps) for individuals from declining industries (e.g., traditional manufacturing) to transition into growing sectors such as green energy, tech, and healthcare.

##### Online and Blended Learning Options:

- Provide online courses and blended learning pathways to ensure job changers can access education while balancing current employment or life commitments.

##### Sector-Specific Training Partnerships:

- Collaborate with businesses to design sector-specific training courses that address the unique skills needed in industries like advanced manufacturing, conservation, and marine engineering.

##### Job Placement and Internship Programmes:

- Establish job placement initiatives where job changers can gain hands-on experience in emerging sectors to boost their employability.

##### Personalised Career Counselling:

- Offer one-on-one career counselling and skills assessment sessions to help job changers identify transferable skills and design a personalised reskilling plan.

##### Effective Careers Information, Advice and Guidance:

- Develop targeted outreach programmes in partnership with local colleges, community groups, and employment support services to reach underrepresented groups.
- Embed careers advice within community settings (e.g. libraries, community centres, and job clubs) to improve accessibility for individuals who may not engage with traditional services.
- Host regular careers fairs and skills events with a focus on inclusive participation, featuring local employers from key and emerging sectors (e.g. health and social care, hospitality & tourism, and emerging opportunities in renewables, decarbonisation, engineering etc).
- Work with employers to co-design career pathways that offer real opportunities for progression, especially for part-time and low-wage work.



### Support for Self-Employment in the New Forest

#### Objective

Provide resources and training to empower individuals to pursue and succeed in self-employment, fostering local entrepreneurship.

#### Rationale

New Forest has a relatively large proportion of self-employment (11.5% compared to 10.6% at Hampshire level) who contribute to the local economy through various small businesses and entrepreneurial activities. However, over the last decade the level of self-employment has been steadily declining at a faster rate than Hampshire. By supporting self-employment, the New Forest can enhance their economic resilience, foster innovation, and improve the quality of life for their residents.

#### Importance of supporting self-employment opportunities

##### Economic Benefits

- Job Creation: Self-employed individuals often create jobs for themselves and others, boosting local employment.
- Economic Diversification: It helps diversify the local economy, reducing reliance on a few large employers.

##### Community Engagement

- Local Investment: Self-employed individuals are more likely to invest in their local communities, supporting other local businesses and contributing to community development.

##### Innovation and Entrepreneurship

- Innovation: Self-employment encourages innovation and entrepreneurship, leading to the development of new products, services, and business models.
- Skill Development: It provides opportunities for individuals to develop a wide range of skills, from business management to technical expertise.

##### Quality of Life

- Work-Life Balance: Self-employment can offer greater flexibility, allowing individuals to achieve a better work-life balance.
- Attracting Residents: It can attract new residents to rural areas, including those seeking a lifestyle change or remote work opportunities.

##### Digital Connectivity

- Remote Work: Advances in digital connectivity have made it easier for self-employed individuals to operate businesses from rural locations, expanding their market reach.
- Shared Workspaces: The development of shared spaces in rural areas supports self-employed individuals by providing access to resources and networking opportunities.

### Support for Self-Employment in the New Forest

#### Skills and Training Actions

##### Entrepreneurship Training:

- Offer comprehensive training Programmes on business start-up, financial management, marketing, and business growth strategies for aspiring self-employed individuals.

##### Mentorship for Entrepreneurs:

- Establish a mentorship program linking new entrepreneurs with experienced business owners who can offer guidance, advice, and support in the early stages of business development.

##### Access to Resources and Grants:

- Provide information on available grants, financial support, and business development resources tailored to self-employed individuals in the New Forest.

##### Networking and Business Support Groups:

- Create opportunities for self-employed individuals to meet and collaborate with others in their industry, including through local business hubs or coworking spaces.

##### Digital Marketing and Online Business Training:

- Equip self-employed individuals with essential digital skills, including social media marketing, e-commerce, and website development, to help them scale their businesses and reach wider audiences.

##### Access to Shared Workspaces:

- Develop or promote co-working spaces in rural areas that support self-employed individuals by providing office resources, technology, and collaborative environments to foster innovation and growth.

##### Effective Careers Information, Advice and Guidance:

- Develop targeted outreach programmes in partnership with local colleges, community groups, and employment support services to reach underrepresented groups.
- Embed careers advice within community settings (e.g. libraries, community centres, and job clubs) to improve accessibility for individuals who may not engage with traditional services.

# **New Forest Skills Action Plan 2025-2030: Technical Report**



Technical Report | June 2025

New Forest District Council is grateful for the work undertaken by EKOS Consultancy in supporting the preparation of this Skills Action Plan.

Direct enquiries regarding this report should be submitted to:

Economic Development Team  
New Forest District Council  
Tel: 02380 285187  
Email: [businesssupport@nfdc.gov.uk](mailto:businesssupport@nfdc.gov.uk)

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# 1 Introduction

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The workforce in the New Forest faces several challenges and opportunities. A significant proportion of workers are nearing retirement, creating skills gaps and recruitment challenges. Many young people leave the area for education and employment elsewhere, leading to local labour shortages. Additionally, tourism and agriculture contribute to seasonal job fluctuations, requiring flexible skills solutions to support economic stability.

While regional strategies like the [Solent Local Skills Improvement Plan \(LSIP\)](#) offer a broad framework for workforce development, they do not fully address the unique challenges and opportunities within the New Forest. There was a recognised need therefore to develop a tailored, place-based skills plan that aligned with local economic needs, supports workforce resilience, and ensures the New Forest remains a thriving place to live, work, and invest.

## Commissioning EKOS

New Forest District Council (NFDC) commissioned [EKOS](#), a UK independent economic research consultancy, to:

- “Evidence skills challenges specific to New Forest District and to develop an associated skills action plan with bespoke New Forest interventions, thereby maximising the benefits of the Solent Freeport for the district”.

## Research Aims

This research aims to support the NFDC in maximising the benefits of the Freeport while ensuring that local priorities and challenges are effectively addressed. Given that the New Forest is a key contributor to the business rate retention pipeline programme, it is essential to explore both Freeport-related opportunities and additional approaches that align with the district’s economic and workforce objectives.

## Research Phases and Outcomes

The research was structured into two phases:

- Phase One: Desk research, primary research with stakeholders and stakeholder workshop to:
  - Identify the additional needs for the New Forest.
  - Provide a rationale for the inclusion of target groups and key themes
- Phase Two: Skills Plan Development
  - Develop a New Forest-specific skills plan that addresses local workforce and economic challenges.
  - Ensure the skills plan aligns with both New Forest priorities, regional skills planning and the New Forest Freeport Delivery Plan to maximise opportunities for businesses, residents, and the wider community.

## 2 New Forest Labour Market and Economic Profile

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This chapter draws on data analysis and intelligence to highlight the key economic and labour market issues across the New Forest. It explores skills supply and demand by highlighting some of the key regional opportunities and challenges and outlines a range of strategic insights that have informed the development of the Skills Action Plan.

### 2.1 Headline Findings

**Ageing population & workforce decline:** The New Forest's working-age population is shrinking, with projections indicating a 10% contraction by 2043. This demographic shift poses significant challenges for the vibrancy and sustainability of the local economy.

**Jobs are often lower paid & more part-time work:** The local job market is heavily concentrated in lower-paid foundational and service sectors, with health and accommodation each accounting for 11% of employment. While part-time roles align with the New Forest's strengths in tourism and the rural economy, part-time employment levels are higher than the national average across most sectors.

**Decline in key industries:** Employment in manufacturing has fallen by 14% and construction by 17%, despite their importance to the local economy and the transition to net-zero. Ensuring that skills pathways support both replacement demand and future workforce needs in these sectors is critical.

**Job demand:** Current jobs demand continues to be in lower-paid foundational and service sectors with key employers being NHS, recruiters for teaching assistants (particularly SEN), chefs, care workers, and cleaners

**Rising unemployment & economic strain:** There is an increasing reliance on unemployment-related benefits in the New Forest which has been most pronounced in areas with existing deprivation, such as Totton and Eling, and Hythe and Dibden.



**Earnings & gender pay gap:** Wages in the New Forest are affected by higher rates of part-time and lower-qualified work, particularly among women. In 2024, the gross weekly median pay for full-time workers in the New Forest was £668, significantly below the national average of £732. Men earned £801 per week, while women earned £594, marking a £207 weekly pay gap. This gender pay gap has widened since 2014 when the gap stood at £173 per week.

## 2.2 Population

New Forest has an ageing population resulting in a declining working age population, as set out in Table 2.1. In 2023, the number of individuals of working age (between 16 and 64) in New Forest was around 95,800. This is a decrease of 5% from 2013 (5,500 individuals). If there were to be no policy interventions to address this, and the trends observed were to continue to 2043, Table 2.2 indicates that the New Forest working age population is forecast to have contracted by 10% - potentially presenting challenges for the vibrancy and vitality of the New Forest economy.

**Table 2.1: Population change (2013 to 2023)**

	2013	2023	Change	% Change	% Change, Hampshire	% Change, England
Children (aged 0 to 15)	28,700	26,400	-2,300	-8%	2%	5%
Working age (aged 16 to 64)	101,300	95,800	-5,500	-5%	4%	5%
Pensionable age (aged 65+)	47,300	53,100	5,900	12%	20%	16%
<b>Total</b>	<b>177,400</b>	<b>175,400</b>	<b>-2,000</b>	<b>-1%</b>	<b>7%</b>	<b>7%</b>

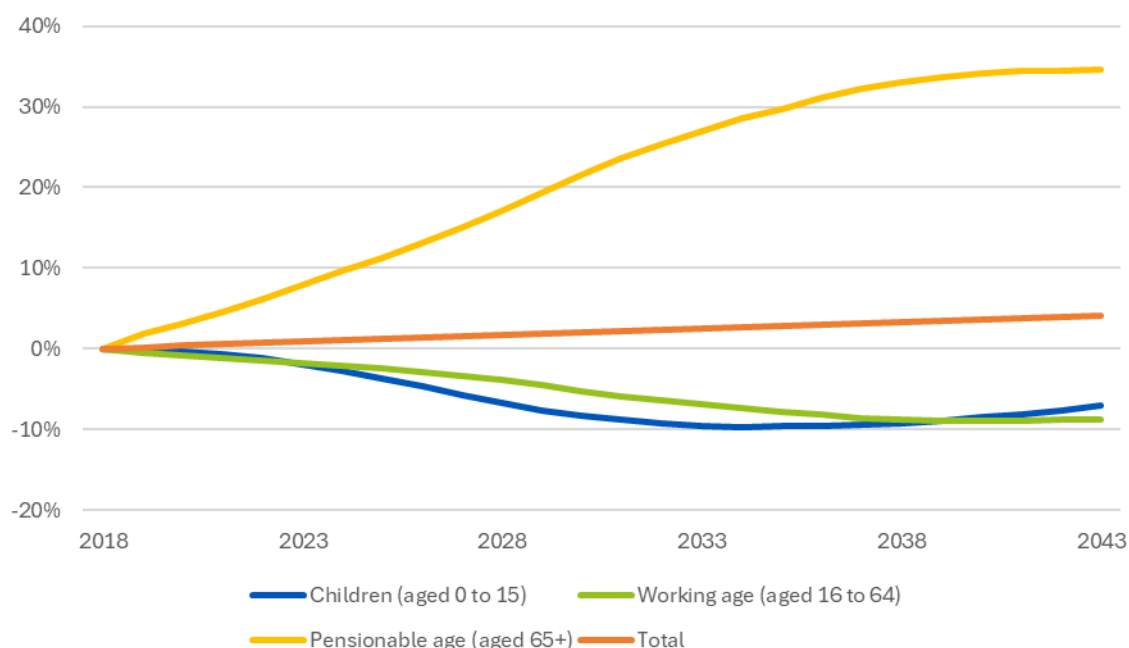
Source: ONS

**Table 2.2: Population principal projections (2018-based percentage change) (2018 to 2043)**

	2018	2043	Change	% Change	% Change, Hampshire	% Change, England
Children (aged 0 to 15)	28,500	26,500	-2,000	-8%	-3%	-1%
Working age (aged 16 to 64)	99,400	90,700	-8,700	-10%	-2%	4%
Pensionable age (aged 65+)	51,900	69,900	18,000	26%	30%	31%
<b>Total</b>	<b>179,800</b>	<b>187,100</b>	<b>7,300</b>	<b>4%</b>	<b>7%</b>	<b>9%</b>

Source: ONS

**Figure 2.1: Population principal projections (2018-based percentage change) (2018 to 2043)**



Source: ONS.

## 2.3 Business Base

In 2024, there were approximately 7,800 businesses across the New Forest, predominately in industries such as professional, scientific and technical (16%) and construction (16%), Tables 2.3 and 2.4. The business base has contracted by 3% (lower rate of contraction compared to 8% at Hampshire local authority level), between 2019 and 2024, particularly driven by decline in main sector of professional, scientific and technical services (-12%) and information and communication (-18%). The industries that have experienced the largest absolute growth were construction (+4%) and property (+8%) albeit at a lower rate of growth compared to Hampshire and national averages.

Table 2.3: Business base by industry (2019 to 2024)

	2019	2024	% of 2024	Change	% Change	% Change, Hampshire	% Change, England
Professional, scientific & technical	1,440	1,270	16%	-170	-12%	-16%	-11%
Construction	1,210	1,255	16%	45	4%	8%	11%
Business administration & support services	595	605	8%	10	2%	-2%	-1%
Retail	555	570	7%	15	3%	-34%	3%
Arts, entertainment, recreation & other services	510	515	7%	5	1%	5%	9%
Manufacturing	490	485	6%	-5	-1%	-8%	-4%
Accommodation & food services	450	470	6%	20	4%	6%	11%
Information & communication	565	465	6%	-100	-18%	-28%	-17%
Property	370	400	5%	30	8%	12%	18%
Agriculture, forestry & fishing	405	330	4%	-75	-19%	-9%	-8%
Health	270	290	4%	20	7%	8%	13%
Motor trades	260	270	3%	10	4%	2%	5%
Transport & storage (inc postal)	250	260	3%	10	4%	2%	5%
Wholesale	300	255	3%	-45	-15%	-7%	-1%
Education	160	160	2%	0	0%	1%	8%
Financial & insurance	150	150	2%	0	0%	-6%	-2%
Mining, quarrying & utilities	40	40	1%	0	0%	4%	10%
Public administration & defence	25	30	0.4%	5	20%	3%	4%
<b>Total</b>	<b>8,055</b>	<b>7,815</b>	<b>100%</b>	<b>-240</b>	<b>-3%</b>	<b>-8%</b>	<b>0.3%</b>

Source: UK Business Counts

Table 2.4: Business base by industry and locality (2024)

	New Forest	New Milton	Lymington & Pennington	Ringwood	Totton & Eling	Hythe & Dibden	Fordingbridge	Brookhurst	Lyndhurst	Burley	Milford on Sea	Ashurst & Cadnam	Fawley
Professional, scientific & technical	16%	12%	15%	12%	9%	8%	10%	9%	6%	5%	6%	4%	4%
Construction	16%	16%	10%	14%	18%	9%	8%	3%	4%	3%	4%	5%	6%
Business administration & support services	8%	14%	11%	13%	12%	10%	7%	6%	7%	5%	5%	4%	5%
Retail	7%	17%	17%	15%	9%	7%	8%	6%	6%	4%	4%	3%	4%
Arts, entertainment, recreation & other services	7%	14%	14%	14%	11%	11%	8%	6%	6%	5%	5%	3%	4%
Manufacturing	6%	15%	15%	12%	18%	9%	6%	5%	4%	3%	4%	4%	7%
Accommodation & food services	6%	14%	12%	11%	12%	11%	7%	7%	9%	4%	7%	3%	4%
Information & communication	6%	15%	12%	15%	12%	8%	10%	9%	6%	5%	4%	3%	3%
Property	5%	13%	18%	14%	5%	9%	10%	8%	9%	6%	5%	3%	3%
Agriculture, forestry & fishing	4%	11%	17%	9%	2%	2%	23%	8%	12%	6%	5%	5%	3%
Health	4%	14%	12%	16%	12%	10%	7%	5%	3%	5%	3%	5%	3%
Motor trades	3%	19%	9%	15%	15%	7%	9%	6%	2%	4%	2%	7%	7%
Transport & storage (inc postal)	3%	15%	12%	8%	21%	17%	6%	2%	6%	2%	4%	4%	6%
Wholesale	3%	10%	14%	18%	16%	4%	10%	4%	6%	4%	4%	4%	4%
Education	2%	16%	13%	13%	6%	13%	6%	6%	3%	9%	3%	3%	3%
Financial & insurance	2%	7%	17%	20%	10%	10%	3%	7%	10%	3%	3%	3%	3%
Mining, quarrying & utilities	1%	13%	0%	13%	0%	13%	13%	0%	13%	13%	0%	0%	0%
Public administration & defence	0.4%	17%	17%	0%	0%	0%	17%	0%	17%	0%	0%	0%	0%
<b>Total</b>	<b>100%</b>	<b>14%</b>	<b>13%</b>	<b>13%</b>	<b>12%</b>	<b>9%</b>	<b>9%</b>	<b>6%</b>	<b>6%</b>	<b>5%</b>	<b>5%</b>	<b>4%</b>	<b>4%</b>

Source: UK Business Counts

## 2.4 Employment

In 2023, total employment for New Forest (measured by people) was estimated to be 75,000, Tables 2.5 and 2.6. While total employment remained relatively stable between 2019 and 2023 with small 2% growth in line with regional (+1%) and national averages (4%), the industry trends reveal a mixed picture in New Forest. The main employment industries of health (+11%) and accommodation (+25%) all outperformed growth relative to Hampshire and England. Employment in retail has remained stable in contrast to regional and national trends where the sector is experiencing widespread job losses.

There have been large declines in manufacturing (-14%) and construction (-17%). As core industries, particularly in context of a just transition to net-zero and green skills, it is important that pathways are on offer to ensure the local workforce can meet replacement demand as well as any forecast demand.

Employment is dominated in lower-paid foundational and service sectors with high levels of part-time working - such as health and accommodation (both 11%). While part-time jobs are linked to the New Forest's regional strengths in visitor and rural economy, there are higher than average levels of part-time employment across most sectors in the New Forest.

Table 2.5: Employment by industry (2019 to 2023)

Industry	2019	2023	% of 2023	Change	% Change	% Change, Hampshire	% Change, England
Health	9,000	10,000	13%	1,000	11%	4%	11%
Accommodation & food services	8,000	10,000	13%	2,000	25%	10%	8%
Retail	7,000	7,000	9%	0	0%	-10%	-7%
Manufacturing	7,000	6,000	8%	-1,000	-14%	-8%	-3%
Education	6,000	6,000	8%	0	0%	-4%	3%
Construction	6,000	5,000	7%	-1,000	-17%	-5%	1%
Business administration & support services	4,500	5,000	6%	500	11%	2%	3%
Arts, entertainment, recreation & other services	4,500	5,000	7%	500	11%	13%	4%
Professional, scientific & technical	5,000	4,500	7%	-500	-10%	0%	10%
Wholesale	3,000	3,000	4%	0	0%	7%	-1%
Transport & storage (inc postal)	2,500	3,000	4%	500	20%	12%	6%
Public administration & defence	1,500	2,000	2%	500	33%	29%	13%
Agriculture, forestry & fishing	2,000	1,750	2%	-250	-13%	-11%	-7%
Information & communication	1,750	1,750	2%	0	0%	-6%	11%
Motor trades	1,750	1,500	2%	-250	-14%	0%	-5%
Property	1,250	1,500	3%	250	20%	22%	8%
Mining, quarrying & utilities	1,500	1,250	2%	-250	-17%	0%	2%
Financial & insurance	900	700	1%	-200	-22%	0%	2%
<b>Total</b>	<b>73,150</b>	<b>74,950</b>	<b>100%</b>	<b>1,800</b>	<b>2%</b>	<b>1%</b>	<b>4%</b>

Source: Business Register &amp; Employment Survey

Table 2.6: Employment by industry and locality (2023)

	New Forest	Totton & Eling	Lymington & Pennington	New Milton	Ringwood	Hythe & Dibden	Lyndhurst	Fawley	Fordingbridge	Ashurst & Cadnam	Brockenhurst	Burley	Milford on Sea
Health	<b>13%</b>	9%	14%	17%	12%	10%	2%	4%	4%	15%	2%	3%	7%
Accommodation & food services	<b>13%</b>	6%	15%	15%	7%	6%	13%	2%	7%	4%	9%	6%	7%
Retail	<b>9%</b>	18%	15%	21%	15%	10%	4%	2%	5%	3%	4%	2%	2%
Education	<b>8%</b>	16%	15%	14%	11%	13%	4%	5%	8%	2%	10%	4%	1%
Manufacturing	<b>8%</b>	16%	17%	9%	9%	5%	4%	34%	4%	1%	1%	1%	1%
Construction	<b>7%</b>	22%	10%	11%	28%	8%	3%	11%	5%	3%	2%	2%	3%
Professional, scientific & technical	<b>6%</b>	8%	13%	8%	19%	6%	10%	7%	9%	3%	5%	3%	3%
Arts, entertainment, recreation & other services	<b>7%</b>	16%	21%	11%	10%	9%	20%	3%	5%	2%	2%	4%	2%
Business administration & support services	<b>7%</b>	15%	8%	17%	23%	9%	12%	10%	3%	4%	3%	2%	3%
Wholesale	<b>4%</b>	42%	13%	5%	17%	2%	5%	5%	6%	4%	1%	1%	0%
Transport & storage (inc postal)	<b>4%</b>	34%	15%	4%	8%	16%	2%	12%	3%	0%	1%	0%	2%
Agriculture, forestry & fishing	<b>2%</b>	1%	2%	2%	0%	0%	9%	0%	2%	1%	1%	1%	0%
Information & communication	<b>2%</b>	11%	11%	7%	21%	5%	6%	4%	9%	3%	7%	4%	2%
Motor trades	<b>2%</b>	27%	6%	14%	10%	5%	5%	7%	7%	5%	7%	3%	2%
Property	<b>2%</b>	7%	15%	38%	8%	7%	7%	3%	7%	2%	5%	3%	2%

	New Forest	Totton & Eling	Lymington & Pennington	New Milton	Ringwood	Hythe & Dibden	Lyndhurst	Fawley	Fordingbridge	Ashurst & Cadnam	Brockenhurst	Burley	Milford on Sea
Public administration & defence	<b>3%</b>	26%	26%	3%	5%	11%	23%	1%	1%	1%	1%	1%	1%
Mining, quarrying & utilities	<b>2%</b>	6%	4%	8%	8%	36%	24%	4%	3%	0%	0%	1%	2%
Financial & insurance	<b>1%</b>	12%	15%	16%	32%	6%	1%	2%	4%	4%	6%	1%	1%
<b>Total</b>	<b>100%</b>	<b>15%</b>	<b>14%</b>	<b>13%</b>	<b>13%</b>	<b>9%</b>	<b>8%</b>	<b>7%</b>	<b>5%</b>	<b>4%</b>	<b>4%</b>	<b>3%</b>	<b>3%</b>

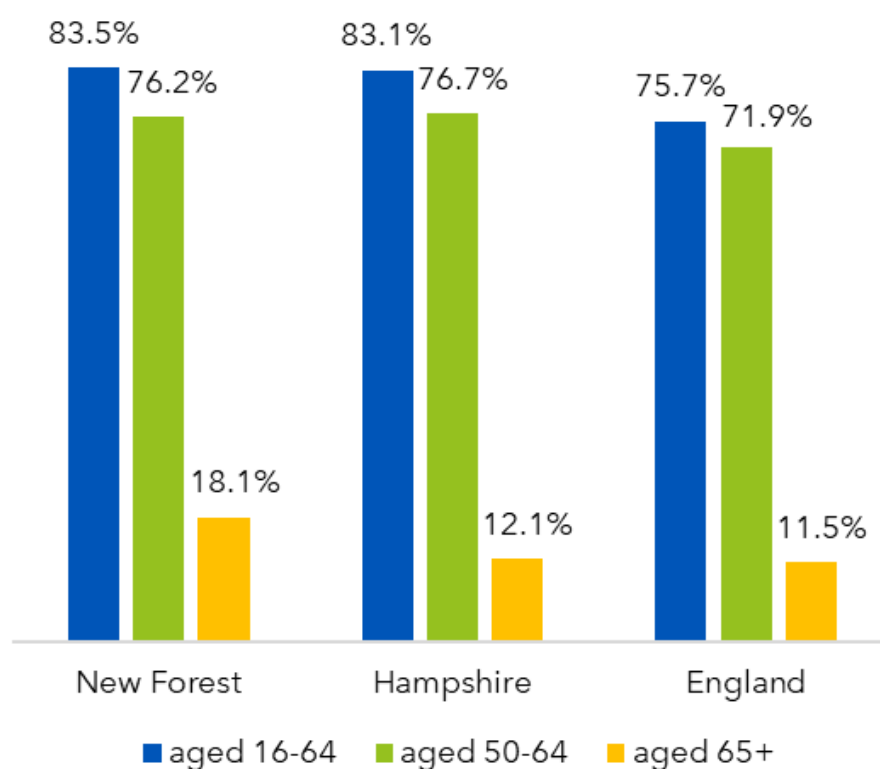
Source: Business Register & Employment Survey



Between July 2023 and June 2024, the employment rate for the working age population was 83.5% - broadly in line with Hampshire average (83.1%) and much higher than national average, Figures 2.2 and 2.3. This means that roughly two in 10 of the New Forest's working age population were unemployed (1.8%) or economically inactive (15%).

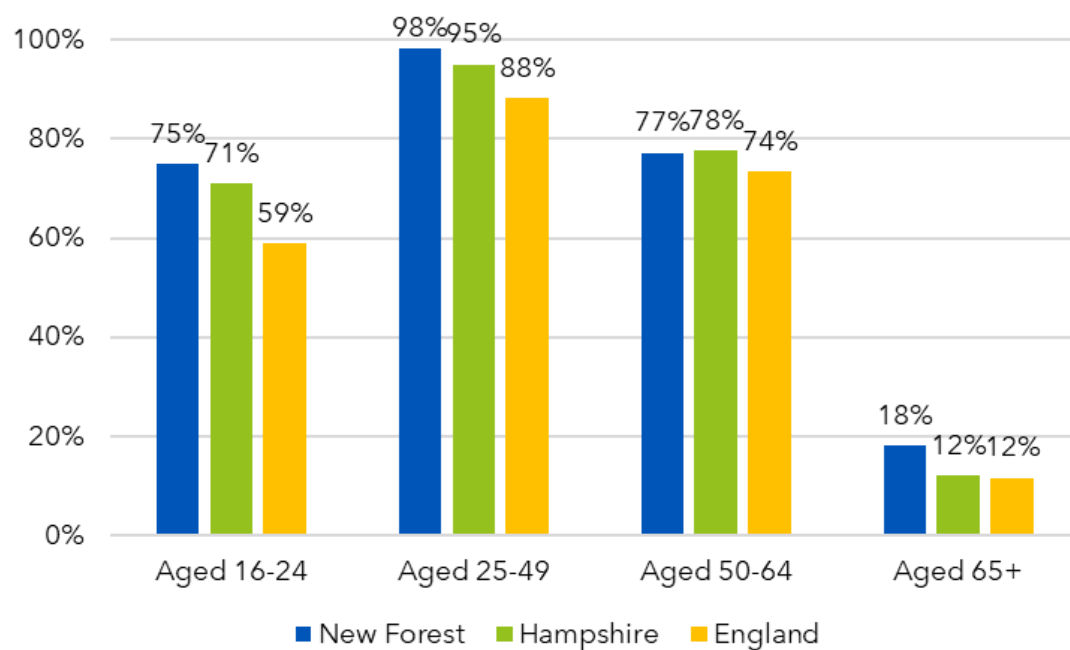
Employment patterns are different in rural areas such as New Forest. For example, there are higher incidences of part-time employment, self-employment, portfolio working, and home-working compared to urban areas, Figure 2.4.

**Figure 2.2: Employment rate by selected age groups (2023/24)**



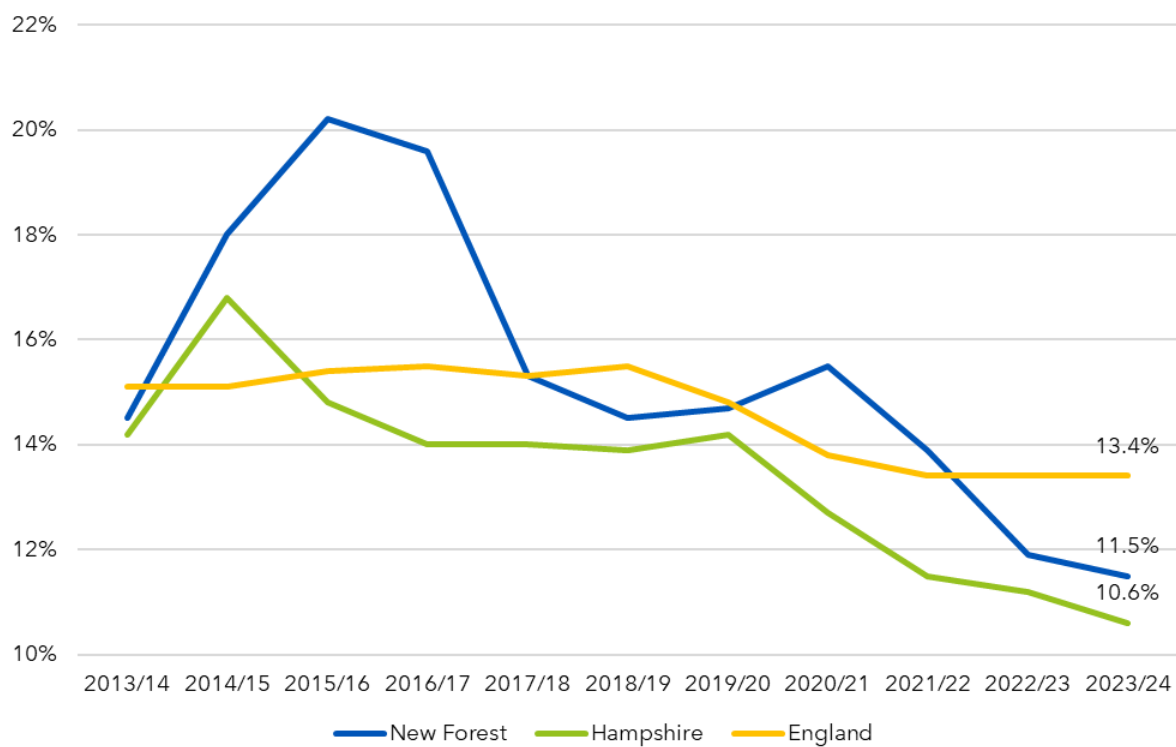
Note: Annual data is between July 2023 and June 2024.  
Source: Annual Population Survey.

**Figure 2.3: Economic activity rate by age bands (2023/24)**



Note: Annual data is between July 2023 and June 2024.  
Source: Annual Population Survey.

**Figure 2.4: Self-employment rate as percentage of employment (2013/14 to 2023/24)**



Source: Annual Population Survey.

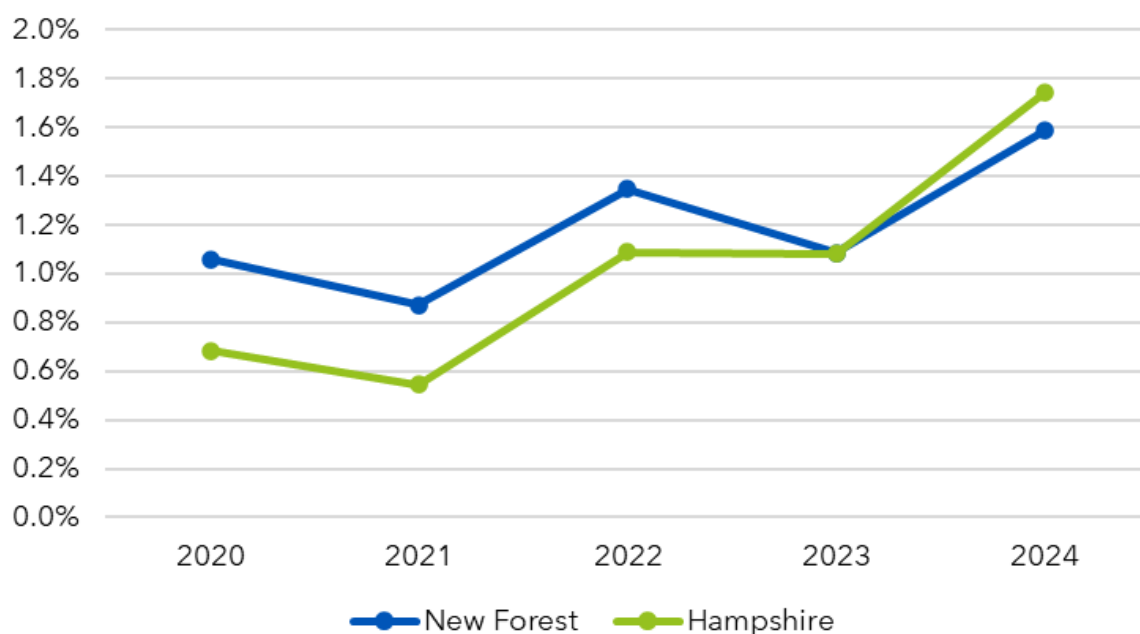
## 2.5 Unemployment

### Young People

Due to Raising the Participation Age (RPA) legislation 2014, young people are under a duty to participate in education or training until at least their 18th birthday, although in practice most young people continue until the end of the academic year in which they turn 18 (academic Year 13). Destination data from Hampshire County Council shows that the New Forest has a lower proportion of young people that move to participating situations (including full-time education, employment and training) which meet the Department for Education defined 'Raising the Participation Age (RPA)' (91.6% in New Forest compared to 92.8% at Hampshire level).

Therefore, New Forest has a higher proportion of young people who are not in education, employment, or training (NEETs) or is in part-time education or employment. Looking specifically at NEETs, the percentage of NEETs has broadly been on the rise since 2020, Figure 2.5.

**Figure 2.5: Percentage of Year 11 Leavers who are NEETs (2020 to 2024)**



Source: Hampshire County Council 2024 Activity Survey - Year 11 Leavers from New Forest District

## Unemployment-related benefits

Across New Forest, the claimant count (those seeking unemployment-related income support) rose sharply following the initial lockdown measures in March 2020, peaking at almost 4,000. The claimant count gradually decreased to 1,900 in 2022, however, it has rose in the past two years with 2,200 people claiming unemployment-related income support in 2024. The growth in claimant count has been concentrated in existing pockets of deprivation such as Totton and Eling and Hythe and Dibden, Table 2.7.

**Table 2.7: Number of people claiming unemployment-related benefits (2019 to 2024)**

	2019	2024	% of 2024	Change	% Change
Totton & Eling	280	450	20%	170	61%
New Milton	260	355	16%	95	37%
Hythe & Dibden	220	340	15%	120	55%
Lymington & Pennington	145	220	10%	75	52%
Fawley	135	220	10%	85	63%
Ringwood	105	200	9%	95	90%
Fordingbridge	60	110	5%	50	83%
Brockenhurst	25	75	3%	50	200%
Milford on Sea	35	65	3%	30	86%
Burley	40	65	3%	25	63%
Ashurst & Cadnam	25	55	2%	30	120%
Lyndhurst	25	50	2%	25	100%
<b>New Forest</b>	<b>1,345</b>	<b>2,205</b>	<b>100%</b>	<b>860</b>	<b>64%</b>

Source: Claimant Count

One-third of households (34%) in New Forest are deprived in some way, particularly concentrated in pockets of Totton, Waterside, New Milton and Fawley, Table 2.8. Most of these areas are within close proximity to the Freeport sites – this should be seen as an inclusive growth opportunity for any skills intervention to target local people in these areas.

**Table 2.8: Percentage of households deprived across 4 dimensions (2021)**

	1 dimension	2 dimensions	3 dimensions	4 dimensions
<b>New Forest</b>	<b>34%</b>	<b>12%</b>	<b>2%</b>	<b>0.2%</b>
New Milton	37%	13%	2%	0.1%
Fawley	36%	14%	3%	0.3%
Milford on Sea	35%	8%	1%	0.1%
Totton & Eling	34%	13%	3%	0.3%
Hythe & Dibden	34%	12%	2%	0.2%
Ringwood	34%	13%	2%	0.1%
Fordingbridge	33%	11%	2%	0.1%
Ashurst & Cadnam	33%	10%	1%	0.1%
Burley	32%	9%	1%	0.1%
Lyndhurst	32%	10%	1%	0.2%
Brockenhurst	32%	8%	1%	0.0%
Lymington & Pennington	32%	11%	2%	0.1%

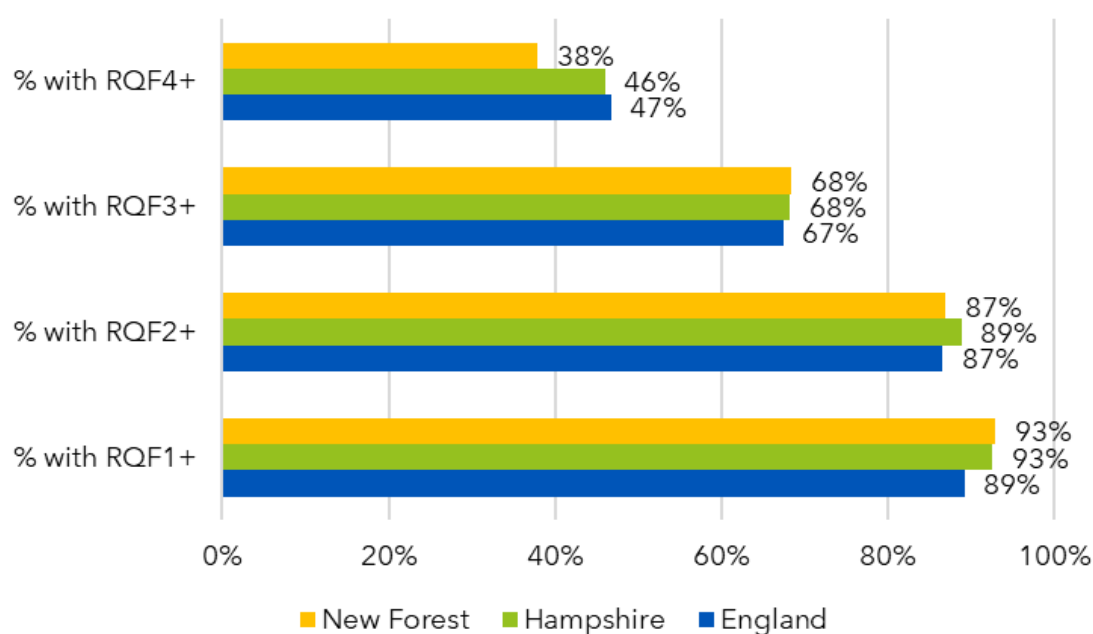
The 4 dimensions of deprivation are: Employment, education, health and disability, and household overcrowding.

Source: Census 2021

## 2.6 Skills and Qualifications

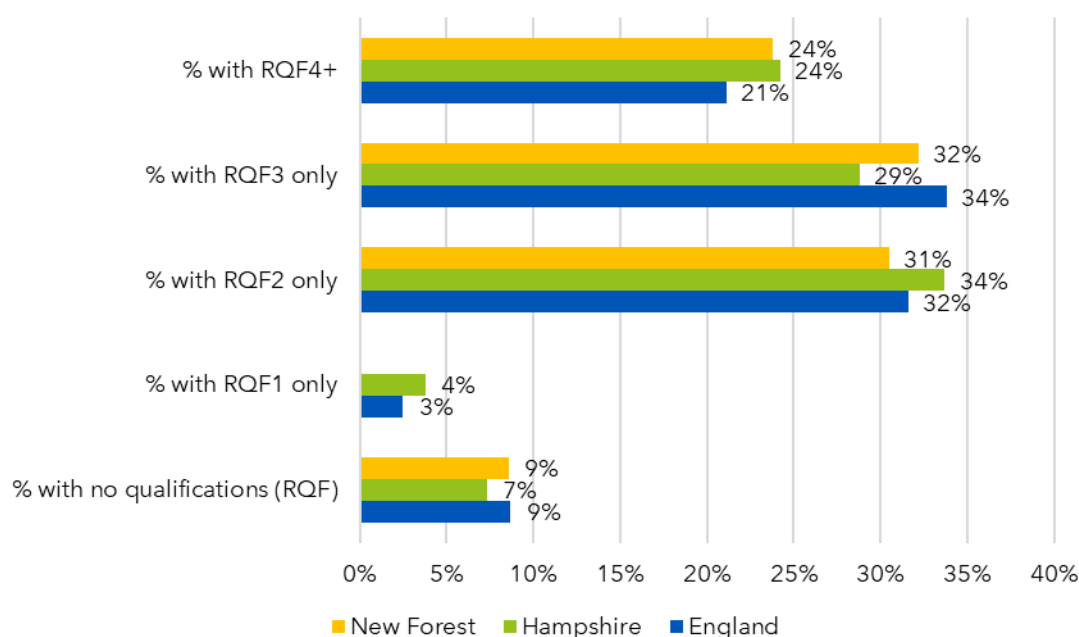
New Forest has a much lower proportion of people of working age with higher level qualifications (RQF4 and above), particularly amongst older cohort (people aged 50 to 64), Figure 2.6. Young people in New Forest are relatively higher skilled than regional and national averages, Figure 2.7.

**Figure 3.6: Working age qualifications (2023)**



Source: Annual Population Survey

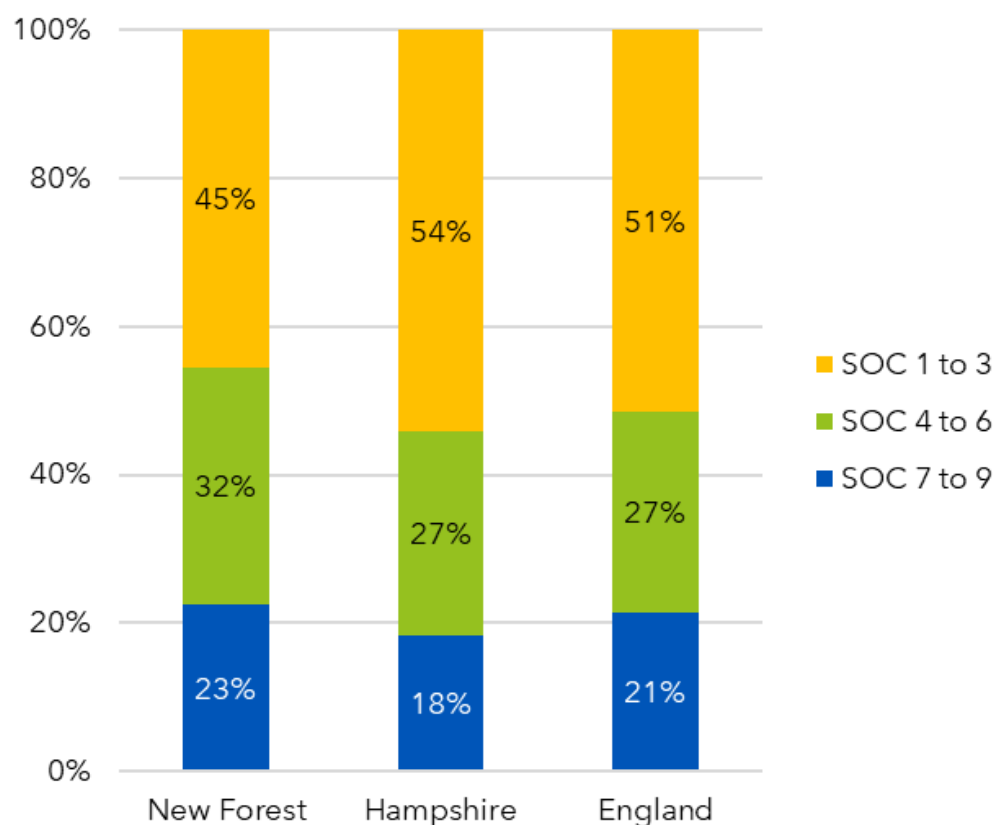
**Figure 2.7: Qualifications of population aged 16 to 24 (2023)**



Note: Estimate for % with RQF1 only in New Forest is unavailable due to small sample size.  
Source: Annual Population Survey

Between July and June 2023, New Forest had a lower proportion of individuals employed in higher-level professional occupations (45%) compared to England (51%), Figure 2.8. However, 12% of individuals were employed as managers, directors and senior officials compared to 11% at a national level. New Forest has a greater proportion of its workforce employed in medium-level occupations (such as skilled trades occupations, caring, leisure and other service occupations) (32% compared to 27% England) and a marginally higher rate of individuals employed in low-skilled occupations (such as elementary occupations).

**Figure 2.8: Employment by Standard Occupational Classification (SOC2020) (2023)**



SOC Codes 1 to 3 include: managers, directors and senior officials; professional occupations; and associate professional occupations.

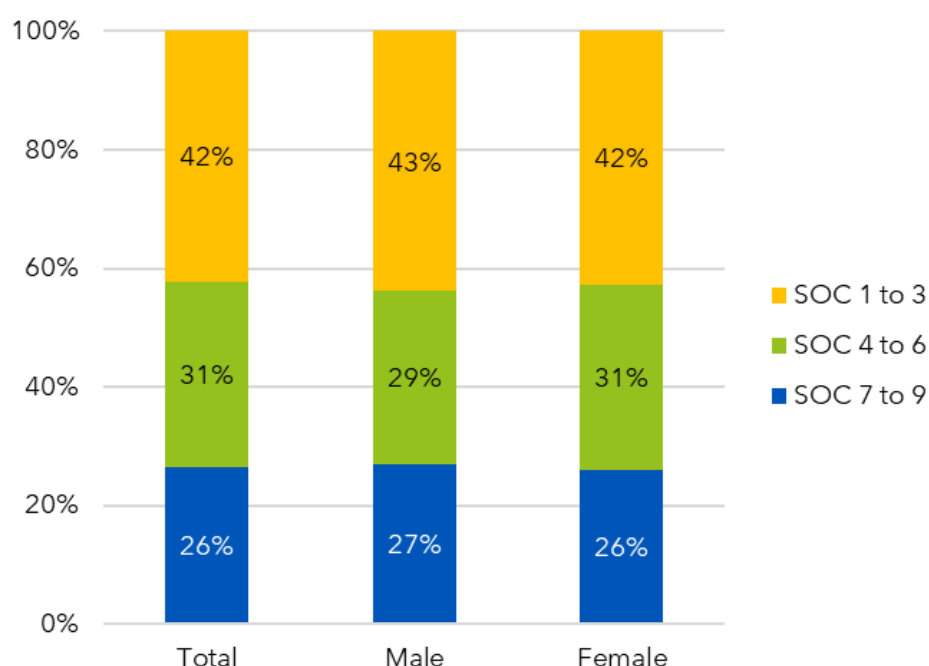
SOC Codes 4 to 6 include: administrative and secretarial occupations; skilled trades occupations; and caring, leisure and other service occupations.

SOC Codes 7 to 9 include: sales and customer service occupations; process, plant and machine operatives; and elementary occupations.

Source: Annual Population Survey.

Women also tend to be employed in lower-skilled and lower paid occupations where the quality and security of their employment may be considerably poorer than their male counterparts, Figure 2.9. Across New Forest, more males (13% of males in employment) were employed in higher-skilled occupations such as managers, directors, and senior officials than females (9.5%). Occupations such as caring and leisure (17.3%) and administrative and secretarial occupations had a larger share of female employment (13.2%) than male employment.

**Figure 2.9: New Forest Employment by Standard Occupational Classification and gender (SOC2020) (2023)**



SOC Codes 1 to 3 include: managers, directors and senior officials; professional occupations; and associate professional occupations.

SOC Codes 4 to 6 include: administrative and secretarial occupations; skilled trades occupations; and caring, leisure and other service occupations.

SOC Codes 7 to 9 include: sales and customer service occupations ; process, plant and machine operatives; and elementary occupations.

Source: Annual Population Survey.

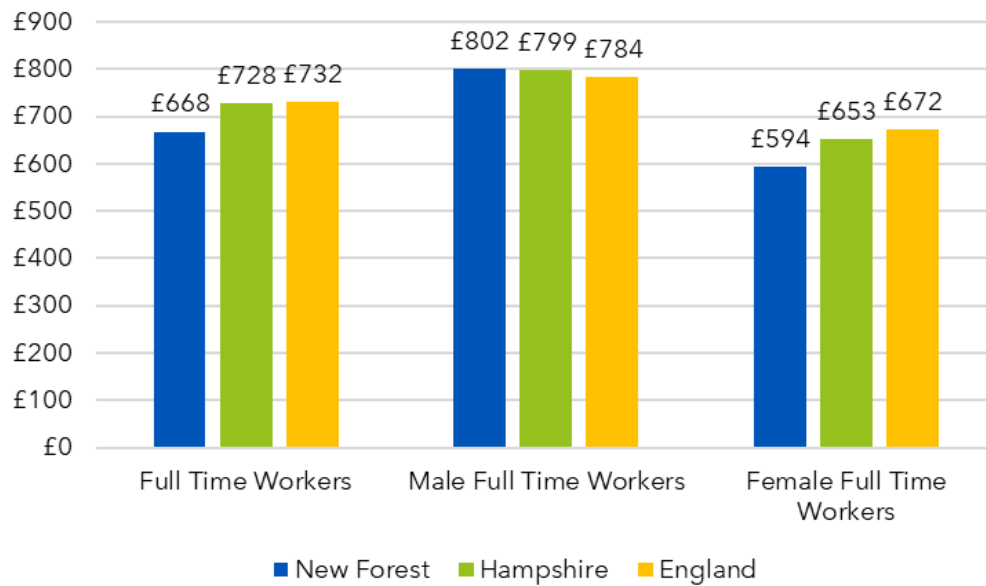
## 2.7 Earnings

Earnings in the New Forest are impacted by the higher prevalence of part-time working and lower-qualified work, particularly for women, Figure 2.10. In 2024, gross weekly median pay for full-time workers in the New Forest (£668) was below the national average (£732). Males received a higher weekly gross pay at £801 than females at £594 - a difference of £207 each week. This pay gap between male and female weekly gross pay has only increased since 2014, where the disparity was £173, Figure 2.11.

More efforts could be taken to address the quality of work for women across the New Forest and address the existing equality imbalances.

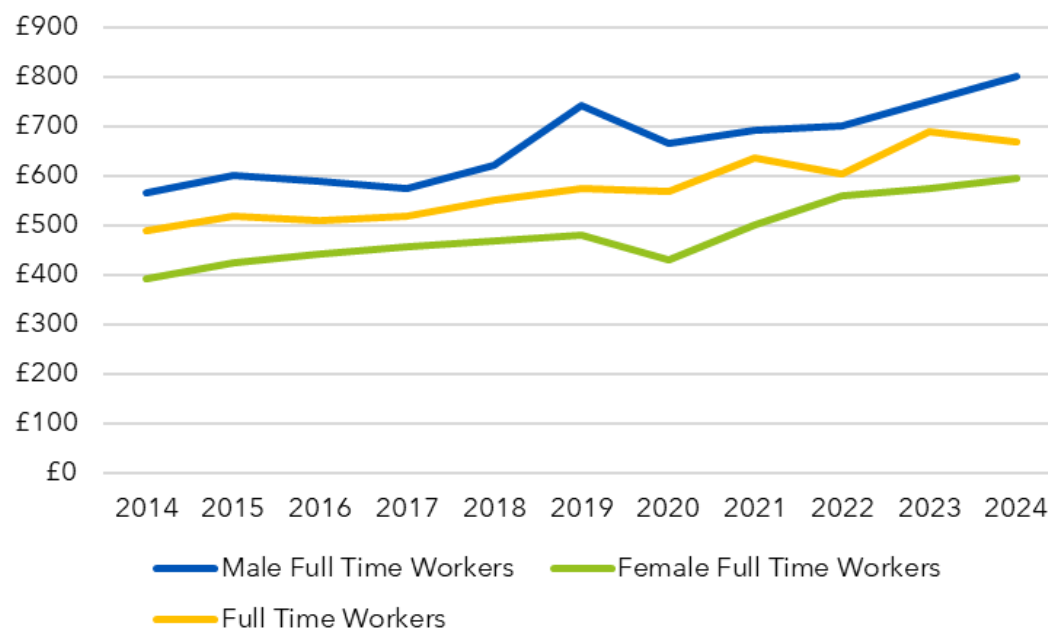


**Figure 2.10: Gross median pay (workplace-based) (2024)**



Source: Annual Survey of Hours & Earnings

**Figure 2.11: Gross median pay (workplace-based) (2014 to 2024)**



Source: Annual Survey of Hours & Earnings

## 2.8 Job Postings

Between October 2023 and 2024, there were almost 20,000 job postings in New Forest across almost 2,500 employers, Table 2.9. Job postings were mainly concentrated around the population centres of Ringwood, New Milton, Totton and Eling, and Lymington, Table 3.10. It shows that current demand continues to be in lower-paid foundational and service sectors with key employers being NHS, recruiters for teaching assistants (particularly SEN), chefs, care workers, and cleaners, Table 2.10.

Chefs also saw the biggest increase in demand in New Forest. The data also tracks what skills are most commonly sought in the job postings – these were management, communication and customer service skills.

**Table 2.9: Job postings by employer (2023/24)**

Employer	Sector	Total number of unique	% of unique
NHS	Health and social care	474	2%
Randstad	Recruitment - teaching assistants particularly around SEN	268	1%
Hampshire County Council	Public sector	218	1%
Colten Care	Health and social care - Residential, nursing, and dementia care	211	1%
New Forest District Council	Public sector	210	1%
Maid2Clean	Cleaning	205	1%
The Work Shop Resourcing Ltd	Regional recruitment - based in Ringwood	199	1%
Reed	Education, accountancy, logistics, IT, engineering	191	1%
Platinum Recruitment Consultancy	Hospitality	169	1%
Cma Recruitment Group	Accountancy & Finance, Executive, HR recruitment	162	1%
Total		19789	

Annual data is from October 2023 to October 2024.

Source: Lightcast

**Table 2.10: Job postings by locality (2023/24)**

Locality	Total number of unique postings	% of unique
Ringwood	4982	25%
Lymington	3392	17%
New Milton	2811	14%
Fordingbridge	2620	13%
Totton	1875	9%
Lyndhurst	1546	8%
Total	19789	100%

Annual data is from October 2023 to October 2024.

Source: Lightcast

**Table 2.11: Job postings by occupation (2023/24)**

Occupation	Total number of unique postings	% of unique
Care workers and home carers	1106	6%
Chefs	723	4%
Cleaners and domestics	694	4%
Sales	568	3%
Teaching assistants	543	3%
Customer service	477	2%
Kitchen and catering assistants	458	2%
Bookkeepers, payroll managers and wage clerks	361	2%
Other administrative	351	2%
Retail & Wholesale - managers and directors	301	2%
Sales and retail assistants	301	2%

Annual data is from October 2023 to October 2024.

Source: Lightcast

## 2.9 Apprenticeships

Apprenticeships are in sectors which have well-established apprenticeship pathways commonly used by employers in these sectors. For example, health, public services and care had the largest number of new starts (240) and achievements (130) in 2022-23, Table 2.12.

**Table 2.12: Apprenticeship starts by industry (2022/23)**

Industry	Number	% of total
Health, Public Services and Care	240	27%
Business, Administration and Law	170	19%
Engineering and Manufacturing Technologies	170	19%
Retail and Commercial Enterprise	110	12%
Construction, Planning and the Built Environment	100	11%
Information and Communication Technology	50	6%
Agriculture, Horticulture and Animal Care	30	3%
Education and Training	10	1%
Leisure, Travel and Tourism	10	1%
<b>Total</b>	<b>900</b>	<b>100%</b>

Source: Department for Education

## 3 Employer Skills and Workforce Needs Survey

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An online survey targeted at employers was distributed in early January 2025 by partners (including New Forest District Council, Hampshire County Council, and Solent Business Skills and Solutions). The survey ran for 4 weeks and closed on 7<sup>th</sup> February 2025.

The employer survey received a total of **65 responses**. The survey had an estimated reach of 1600 contacts through partners' distribution; therefore, the estimated response rate is around 4%.

### 3.1 Headline Findings

#### Respondent Profile

- The employer survey received a total of **65 responses**.
- The main industries represented were retail (16%), accommodation and food services (14%), arts, entertainment and leisure and recreation (11%), business administration and support (10%), and manufacturing (10%). Given the lack of representation from particular industries such as construction and IT digital companies, caution is advised when analysing some aspects of the survey findings.
- In terms of business location, there was a reasonable mix of respondents from across the District.
- Almost half of employers (42%) stated that all of their staff live within the New Forest.
- For transport to work, there is a significant reliance on private transport to access work and very low levels of active travel and public transport use to travel to work amongst the respondent workforce.

#### Recruitment

- Two thirds of respondents (67%) were actively recruiting in the last 12 months.
- A relatively high proportion of vacancies were seasonal or temporary (38%) with a similar proportion of vacancies advertising a full-time role (37%).

- The most common recruitment challenges faced by New Forest employers are that: applicants lack the necessary experience (52%), required attitude or motivation (50%) or lack the required skills (41%).
- Almost half of respondents (43%) who were actively recruiting stated that at least one of the vacancies proved difficult to fill – the most common occupations that were identified as hard-to-fill included chefs, cleaners, and skilled trades (for example, marine electrician, shipwright).

## Skills

- Respondents were asked which skills were most important to their business/organisation. The most commonly reported technical or practical skills were knowledge of organisation and/or industry sector (61%); basic numerical skills and understanding (58%), and computer literacy/basic IT skills (56%). For people and personal skills, the most commonly reported skills were team working (75%), customer handling skills (70%), and ability to manage own time and prioritise tasks (70%).
- The most common causes of skills gap amongst respondents are unable to recruit staff with the required skills (44%), staff are new to the role (31); and the introduction of new working practices (23%) or new technology (21%).

## Training

- The vast majority of respondents (86%) had provided or arranged staff training in the last 12 months. Most training was delivered internally by a member of staff (74%) while over half of respondents reported that they had accessed training from a training provider outside of the New Forest.
- The main reason for respondents who did not use a local training provider in the New Forest was that it did not meet their needs (46%) – this was followed by lack of awareness (31%). Cost was a less common reason (15%).

## Skills provision

- More than one-quarter of respondents (28%) plan on using one of the skills products in the next three years – almost half stated that they would not while remainder (25%) were unsure. The most common issues impacting ability to apprenticeships, T-levels, or work placements are capacity to provide mentoring support (58%), cost (55%), and administrative burden (50%).

## Skills Action Plan priorities

- Skills Action Plan priorities for respondents include improved links between education sector and employers (61%); providing more opportunities for reskilling and upskilling the existing workforce (54%); and better promotion of routes into and pathways through different sectors to attract future talent (51%).

## 3.2 Respondent Profile

Respondents were mostly from the private sector (75%) followed by public sector (19%), and third/voluntary sector (6%). Almost two-thirds of respondents (64%) were micro or small businesses with 19% of respondents self-employed – the remainder were medium (11%) and large (6%) businesses. The vast majority of respondents (79%) were well established having been trading for over 10 years.

The main industries represented were retail (16%), accommodation and food services (14%), arts, entertainment and leisure and recreation (11%), business administration and support (10%), and manufacturing (10%). Given the lack of representation from particular industries such as construction and IT digital companies, caution is advised when analysing some aspects of the survey findings.

**Table 2.1: Respondents by industry**

	% of respondents
Retail	16%
Accommodation and food services	14%
Arts, entertainment, recreation, and other services	11%
Business administration and support services	10%
Manufacturing	10%
Financial and insurance	8%

	% of respondents
Professional, scientific and technical	6%
Visitor economy	6%
Agriculture, forestry, and fishing	5%
Marine	5%
Education	3%
Health and care	2%
Motor trades	2%
Transportation and storage	2%
Other	2%

N=63. Visitor economy and marine were additional categories after recoding other responses. Other response included Chamber of Commerce. No responses were received from companies within construction, Information and communication; Life sciences; Mining, quarrying, and utilities; Property; Public administration and defence; and Wholesale sectors.

In terms of business location, there was a reasonable mix of respondents from across the District. The most common locations were Lymington & Pennington (29%), Brockenhurst & Sway (21%), New Milton (21%), Hythe & Dibden (14%), and Totton and Eling (8%).

**Table 3.2: Respondents by locality**

	% of respondents
Lymington & Pennington - includes Beaulieu	29%
Brockenhurst & Sway	21%
New Milton	21%
Hythe & Dibden	14%
Totton & Eling	8%
Fordingbridge	6%
Lyndhurst & Minstead	6%
Ashurst & Cadnam	5%
Fawley - includes Blackfield, Calshot, Langley, Holbury and Hardley	5%
Milford on Sea	3%
Ringwood	3%
Burley & Bransgore	2%
Marchwood	2%
Other	3%

N=63



## 3.3 Respondent Workforce

Respondents were asked to estimate the proportion of their workforce that live within the New Forest. Almost half of employers (42%) stated that all their staff live within the New Forest.

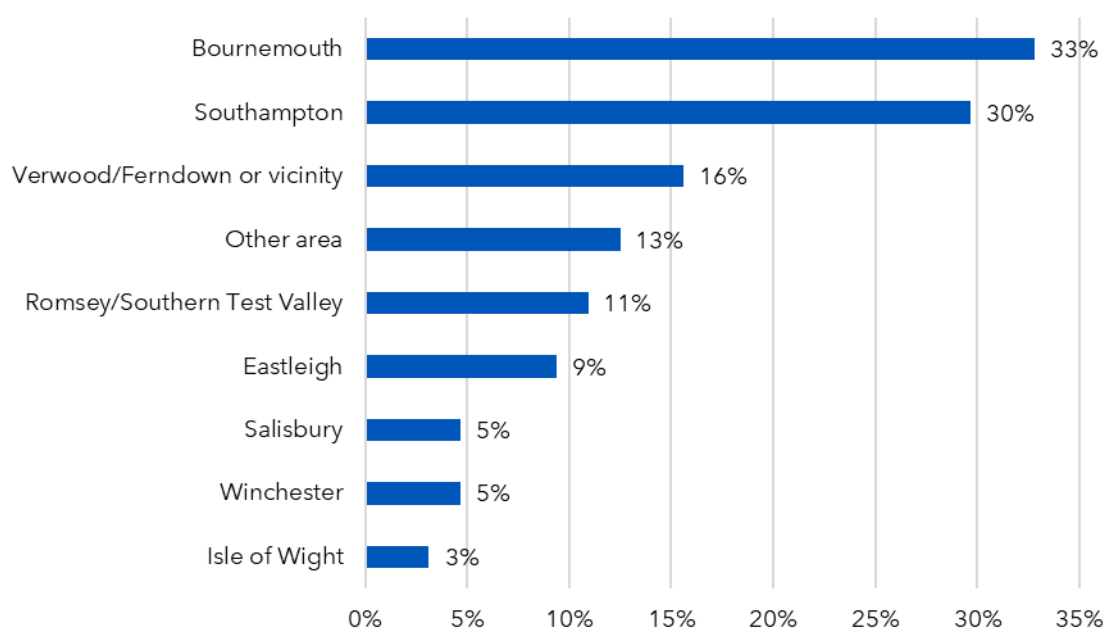
**Table 3.3: What proportion of your staff live in the New Forest District area?**

	% of respondents
All (100%)	42%
Almost all (76% to 99%)	19%
Most (51% to 75%)	17%
Many (26% to 50%)	8%
Some (10% to 25%)	6%
A few (1% to 9%)	5%
None (0%)	3%

N=64.

Bournemouth (33% of respondents) or Southampton (30%) were the most common location of employers' workforce outside of the New Forest – this was followed by Verwood/Ferndown (16%).

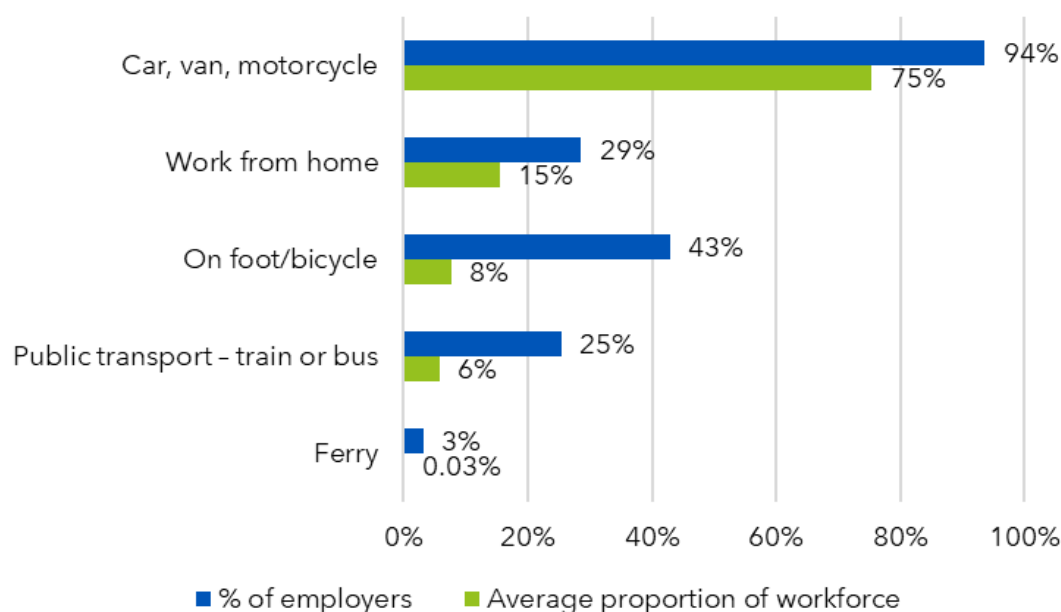
**Figure 3.1: Percentage of respondents who reported that at least one member of staff lived within area**



N=64

For transport, there is a significant reliance on private transport to access work with 94% of employers and 75% of their workforce using a car, van or motorcycle to travel to work. There are very low levels of active travel (8% of respondent workforce) and public transport (6%) to travel to work amongst the respondent workforce.

**Figure 3.2: What proportion of your workforce uses the following modes to travel to and from work (commute only)?**



N=63

## 3.4 Recruitment and Skills Shortages

Two thirds of respondents (67%) were actively recruiting in the last 12 months. In total, these respondents (n=42) had a total of 319 vacancies – an average of 7.6 vacancies per employer. A relatively high proportion of vacancies were seasonal or temporary (38%) with a similar proportion of vacancies advertising a full-time role (37%).

**Table 3.4: How many vacancies have you had in the last 12 months?**

	Number of vacancies	% of vacancies
Seasonal or temporary	120	38%
Full-time (35 hours or more)	118	37%
Part-time (Less than 35 hours)	83	26%
<b>Total</b>	<b>319</b>	<b>100%</b>

N= 42 employers

Most vacancies (55%) were a result of replacement of existing staff leaving the workforce (45% of vacancies were a result of growth of the business) – this likely reflects the high proportion of seasonal or temporary vacancies.

The most common recruitment challenges faced by New Forest employers are that: applicants lack the necessary experience (52%), required attitude or motivation (50%) or lack the required skills (41%). Another challenge is the low number of applications submitted for post(s) (38%).

**Table 3.5: What recruitment challenges does your business/organisation face?**

	%
Applicants lack the necessary experience	52%
Applicants lack the required attitude or motivation	50%
Applicants lack the required skills	41%
A low number of applications submitted for post(s)	38%
Competition from other employers	34%
Applicants lack the necessary qualifications	28%
Remote location/accessibility and travel/transport issues	24%
Pay and conditions when compared to other employers/sectors	21%
Seasonal/temporary work	21%
Shift work/unsociable hours	17%
Other	12%

N=58

Almost half of respondents (43%) who were actively recruiting stated that at least one of the vacancies proved difficult to fill – the most common occupations that were identified as hard-to-fill included chefs, cleaners, and skilled trades (for example, marine electrician, shipwright).

Of these respondents, 80% stated that a vacancy had been hard to fill because applicants lacked the required technical and practical skills – this mostly related to specialist skills to carry out the specific job role.

**Table 3.6: Have any vacancies been hard to fill because applicants lack the required technical and practical skills?**

	%
Specialist skills required to carry out the specific job role	67%
Knowledge of your organisation and/or industry sector	33%
Advanced/specialist IT skills	17%

	%
Reading and understanding instructions, guidelines, manuals, reports, etc.	17%
Writing reports, emails, etc.	17%
Basic numerical skills and understanding	17%
Manual dexterity – skills with which to repair, mend, assemble, etc.	17%
Knowledge of your organisation and products/services offered	17%
Complex numerical/statistical skills and understanding	8%
Adapting to new equipment, processes, materials, etc.	8%
Computer literacy/basic IT skills	0%
Communicating in another language	0%
Other	25%

N=15.

Similarly, around two-thirds of these respondents (67%) stated that a vacancy had been hard to fill because applicants lack the required people and personal skills – this mostly related to ability to manage own time and prioritise tasks.

**Table 3.7: Have any vacancies been hard to fill because applicants lack the required people and personal skills?**

	%
Ability to manage own time and prioritise tasks	70%
Creative and innovative thinking	50%
Managing and/or motivating others	50%
Team working	40%
Persuading, influencing and/or negotiating	30%
Problem solving	20%
Instructing, teaching or training people	20%
Customer handling skills	20%
Managing their own feelings and/or the feelings of others	20%
Sales skills	10%
Setting objectives for others	10%
Presentation skills	10%
Other	10%

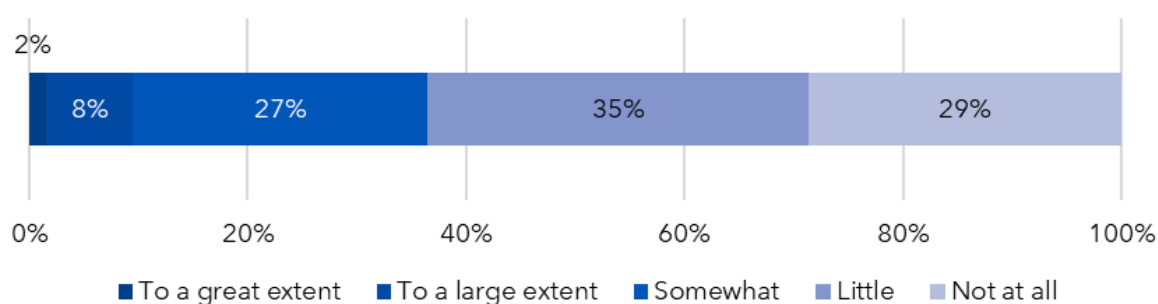
N=15

Staff retention does not appear a challenge for respondents (only 10% stated retention was a challenge to a great or large extent – 29% reported not at all). When asked to explain further, some respondents noted that their positive work environment, benefits, and employee care had resulted in long-serving staff.

Respondents who noted that staff retention was a challenge highlighted difficulties in hiring and retaining young or skilled staff – it was also identified that some industries face more difficulty retaining staff, such as hospitality and engineering businesses.

Often, these employees leave for better opportunities elsewhere and/or younger workers move out of the local area to progress their career.

**Figure 3.3: To what extent, is staff retention a challenge?**



N=63

Respondents were asked which skills were most important to their business/organisation. The most commonly reported technical or practical skills were knowledge of organisation and/or industry sector (61%); basic numerical skills and understanding (58%), and computer literacy/basic IT skills (56%). For people and personal skills, the most commonly reported skills were team working (75%), customer handling skills (70%), and ability to manage own time and prioritise tasks (70%).

**Table 3.8: Which technical or practical skills are most important to your business/organisation?**

	%
Knowledge of your organisation and/or industry sector	61%
Basic numerical skills and understanding	58%
Computer literacy/basic IT skills	56%
Reading and understanding instructions, guidelines, manuals, reports, etc.	52%
Knowledge of your organisation and products/services offered	52%
Writing reports, emails, etc.	47%
Specialist skills required to carry out the role in question	39%
Adapting to new equipment, processes, materials, etc.	30%
Manual dexterity – i.e. skills with which to repair, mend, assemble, etc.	25%
Advanced/specialist IT skills	16%
Complex numerical/statistical skills and understanding	13%
Communicating in another language	2%

Other	9%
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N=64

**Table 3.9: Which technical or practical skills are most important to your business/organisation?**

	%
Team working	75%
Customer handling skills	70%
Ability to manage own time and prioritise tasks	70%
Creative and innovative thinking	56%
Problem solving	53%
Sales skills	41%
Managing and/or motivating others	36%
Managing their own feelings and/or the feelings of others	36%
Instructing, teaching or training people	28%
Persuading, influencing and/or negotiating	27%
Presentation skills	22%
Setting objectives for others	14%
Other	9%

N=64

The most common causes of skills gap amongst respondents are unable to recruit staff with the required skills (44%), staff are new to the role (31; and the introduction of new working practices (23%) or new technology (21%).

Around one-quarter of respondents (24%) implemented changes to their terms and conditions/workplace practices over the last 12 months to help attract and retain staff - this mainly included flexible working and increased salary.

**Table 3.10: What changes to terms and conditions/workplace practices have been implemented?**

	%
Flexible working	73%
Increased salary	60%
Additional benefits (e.g. gym membership, cycle to work scheme)	40%
Increased annual leave entitlement	7%
Other	7%
Special paid leave entitlement (for example, family emergency, bereavement)	0%
Provided company transport (own van, mileage expenses etc)	0%

N=15

## 3.5 Training and Workforce Development

Over two-thirds of respondents (69%) have a training plan that specifies the level and type of training your employees require in the coming year. Half (51%) stated that they have a dedicated training and CPD budget for training.

**Table 3.11: Does your business/organisation have any of the following in place to support workforce development?**

	%
A training plan that specifies the level and type of training your employees require in the coming year	69%
A dedicated budget for training and continuous professional development	51%
A dedicated in-house training manager/co-ordinator	31%

N=39

The vast majority of respondents (86%) had provided or arranged staff training in the last 12 months. Most training was delivered internally by a member of staff (74%) while over half of respondents reported that they had accessed training from a training provider outside of the New Forest.

Training mostly related to operational training (machinery or new equipment) (69%) or mandatory training (61%).

**Table 3.12: Delivery of training**

	%
Internal training – delivered by a member of staff	74%
External training – delivered by a training provider outside of the New Forest	52%
External training – delivered by a provider in the New Forest	39%

N=54

**Table 3.13: Type of training**

	%
Operational training (e.g. training or instruction on, for example, new software, kit, equipment, etc.)	69%
Mandatory training (e.g. training that is deemed to be essential to ensure a safer and more efficient operation)	61%
Statutory training (e.g. training that is required by law)	44%
Management/leadership training (e.g. training focused on developing staff for more senior roles)	37%
Vocational training (e.g. training focused on the skills required for a particular job function or trade, for example, BTEC, micro-credentials etc.)	33%
Academic qualifications or training	20%
Other	9%

N=54

The majority of training was delivered by a private sector training provider (84%) and face-to-face (70%). High levels of satisfaction were reported with private sector training providers.

**Table 3.14: Type of training**

	%
Private sector training provider	84%
University	20%
College	18%
Third/voluntary sector training provider	18%

N=54

**Table 3.15: To what extent, did the training provider(s) meet your organisation's skills needs?**

	Met needs in full	Met needs to some extent	Met needs to a limited extent	Did not meet needs
Private sector provider (n=37)	65%	35%	0%	0%
University (n=37)	67%	22%	0%	11%
Third/voluntary sector provider (n=8)	50%	50%	0%	0%
College (n=8)	25%	63%	13%	0%
<b>Total (n=62)</b>	<b>58%</b>	<b>39%</b>	<b>2%</b>	<b>2%</b>



The main reason for respondents who did not use a local training provider in the New Forest was that it did not meet their needs (46%) – this was followed by lack of awareness (31%). Cost was a less common reason (15%).

**Table 3.16: Why did you not use a local training provider in the New Forest?**

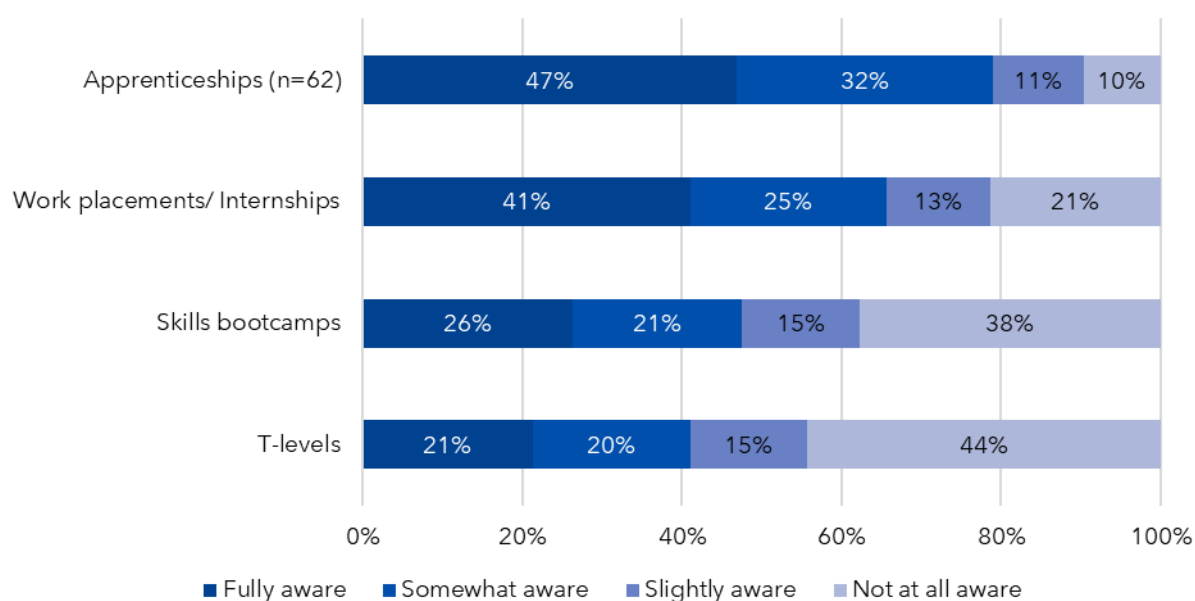
	%
Current provision does not meet our needs	46%
We lack awareness of local training providers and provision	31%
Cost	15%
Previous bad experience	4%
Other	19%

N=26

## 3.6 Apprenticeships, Skills Bootcamps, T-Levels, and Work Placements

Respondents were asked about their awareness and experience of a range of different skills products – these included apprenticeships, skills bootcamps, T-Levels and work placements. Apprenticeships and Work placements/ Internships had the highest level of awareness with relatively low awareness of skills bootcamps.

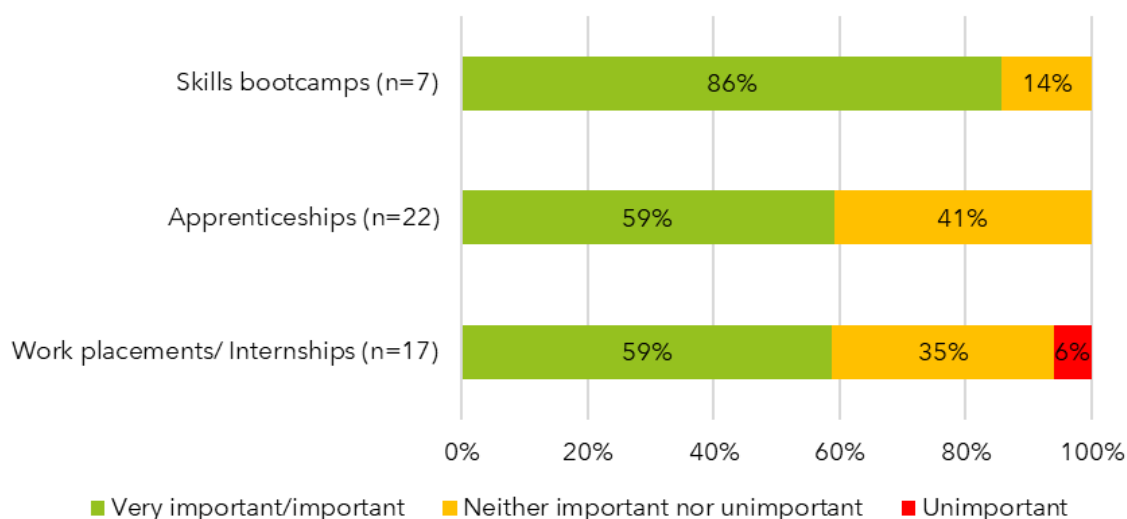
**Figure 3.4: Awareness of skills products**



N=61 unless stated.

Under half of employers (45%) had experience of offering and/or attending one of the skills products. Of these respondents, vast majority had experience of apprenticeships (79%) or work placements (61%) - only one-quarter (25%) had attended skills bootcamps, however these were highly valued.

**Figure 3.5: Overall, how important or otherwise have the following been in helping your business to address its recruitment and skills needs?**



T-Levels response has been omitted due to small sample size.

More than one-quarter of respondents (28%) plan on using one of the skills products in the next three years - almost half stated that they would not while remainder (25%) were unsure. The most common issues impacting ability to apprenticeships, T-levels, or work placements are capacity to provide mentoring support (58%), cost (55%), and administrative burden (50%).

**Table 3.17: Which issues, if any, impact your organisation's ability to offer apprenticeships, T-levels, or work placements?**

	%
Capacity to provide mentoring support	58%
Cost	55%
Administrative burden	50%
Time away from workplace for training	32%
Time taken for staff member to complete qualification	29%
Lack of knowledge about how to go about it	26%
Relevance of provision	26%
Preference for applicants with college certificates/university degrees	8%
Other	11%

N=38

Respondents reported very low awareness and access to each of the skills funds asked in the survey. For example, around two in five respondents (39%) were not at all aware of the Apprenticeship Levy. Similarly, fewer than one-third (29%) of respondents had accessed one of the skills funds (mostly apprenticeship levy – 89% of these respondents).

Finally, respondents were asked to identify the main skills priorities for a Skills Action Plan – this mainly included:

- improved links between education sector and employers (61%).
- providing more opportunities for reskilling and upskilling the existing workforce (54%).
- better promotion of routes into and pathways through different sectors to attract future talent (51%).

**Table 3.18: Which issues, if any, impact your organisation’s ability to offer apprenticeships, T-levels, or work placements?**

	%
Improved links between education sector and employers	61%
Providing more opportunities for reskilling and upskilling the existing workforce	54%
Better promotion of routes into and pathways through different sectors to attract future talent	51%
Inspiring and preparing young people to engage in the range of opportunities provided by the Solent Freeport (for example, low carbon jobs)	42%
Addressing infrastructure challenges (for example, transport, housing, digital)	42%
Raising the profile and attractiveness of specific sectors	37%
Other	7%

N=59

## 4 Stakeholders Consultations and Insights

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### 4.1 Introduction

As part of the development of the NFSAP, the EKOS study team conducted a series of interviews with various key stakeholders and partners within the New Forest skills landscape. In total, 30 interviews were carried out between October 2024 and January 2025.

The primary research stage also included two in-person workshops with members of local education institutions, business groups, the district council and the NFNPA, as well as learner session workshops with college students from Brockenhurst College and Totton College.

The following stakeholders were consulted:

- Local Authorities & Partnerships: Hampshire County Council, Southampton City Council, New Forest National Park Authority, New Forest Business Partnership, several parish councils (Fawley, Hythe & Dibden, Totton & Eling).
- Education & Skills Providers: Brockenhurst College, Totton College, Bournemouth University, Solent University, Hampshire Futures, Solent Business & Skills Solutions.
- Business & Employment: Hampshire Chamber of Commerce, Department for Work and Pensions, Hardisty Jones, Solent Freeport.
- Youth & Community: Community First, Youth Options, The Handy Trust.
- Students: Workshop learner sessions with students at both Brockenhurst and Totton College.

The rest of the chapter has been divided into four sub-sections of findings, including:

- Skills challenges
- Skills opportunities
- Skills infrastructure and policy interventions

There is also a separate sub-section containing feedback and discussion points raised and considered during the two in-person workshop sessions.

## 4.2 Skills Challenges

The following section highlights some of the key skills challenges that were raised by consultees, these have been grouped into a few key areas, namely:

- Barriers to accessing education and training
- Employer and education linkages
- Business environment
- Gaps in provision

### Barriers to Accessing Education and Training

A recurring theme throughout consultations was the need to minimise barriers to education, training, and employment to ensure greater accessibility for all.

One of the most pressing challenges highlighted was the lack of reliable and affordable public transport in the New Forest. Many consultees described the transport network as infrequent, expensive, or, in some areas, non-existent. A specific concern was the recent cancellation of the bus services in the Calshot area which has left that part of the New Forest inaccessible to those relying on public transport. This issue disproportionately affects young people without a driving licence or access to a vehicle, limiting their ability to enrol in education, attend training, or secure employment. Innovative solutions, such as Community First's [Wheels 2 Work](#) which is a moped loan service for young people to access employment opportunities, are high in demand with waiting lists but face uncertain future with funding uncertainty.

Housing affordability was another concern, with property prices in the New Forest well above the national average, limiting the ability to attract and retain workers, with many leaving for higher wages or more affordable housing elsewhere.

Concerns were also raised about the lack of targeted funding for individuals classified as NEET (Not in Education, Employment, or Training). Consultees highlighted that limited investment in youth services was further restricting opportunities for at-risk individuals to develop key employability skills, such as teamwork, communication, and problem-solving.

Without dedicated funding and structured support, many NEET individuals struggle to access education, training, or employment opportunities, creating a persistent barrier to social mobility.

It was acknowledged that NEET individuals are inherently difficult to engage, requiring innovative outreach strategies – The Handy Trust engages with NEET people in a variety of ways. However, they should be a priority group in the Skills Action Plan, with a strong focus on removing barriers to skills provision and employment pathways.

## **Employer and Education Linkages**

A few consultees highlighted a disconnect between employer needs and local training, with business engagement in education under-resourced. This gap can often result in a lag between industry demands and course development - while this challenge is not unique to the New Forest and is reflected across the UK, it remains a key barrier to ensuring a well-aligned, future-ready workforce in the area.

A key recommendation by stakeholders was establishing a shared forum for employers and educators to identify skills shortages and develop targeted training to fill gaps.

## **Business Environment**

Consultations reported a hesitancy among businesses, particularly micro- and small businesses, to invest in training, driven by several financial and operational pressures. While not exclusive to the New Forest, factors such as rising operational costs due to high inflation, increased wages, additional national insurance contributions, and post-Brexit hiring challenges were frequently cited as key concerns.

Specific to the New Forest, consultees identified hospitality, health and social care, finance, and construction as sectors facing acute skills shortages and recruitment difficulties. While these challenges are also seen nationally, they are particularly pronounced in the New Forest due to the structure of the local economy. In industries such as hospitality and health and social care, low wages and demanding working conditions make recruitment especially difficult. Additionally, Brexit has further restricted access to international labour, exacerbating workforce shortages.

A major barrier to attracting workers is the high cost of living in the New Forest, making it difficult for businesses to recruit for lower-paid roles. As a result, the area struggles to

retain and attract talent, particularly in sectors where wages may not be competitive enough to offset the cost of living. Addressing these challenges will require targeted skills development, improved workforce support, and measures to enhance job attractiveness in key sectors.

## Skill Gaps and Shortages

Consultations identified several key skills shortages affecting the New Forest workforce. A notable gap in finance professionals was highlighted, alongside a broader need for vocational apprenticeships to support local industry demands.

Stakeholders also expressed concerns about a shortage of soft skills training, particularly in communication and teamwork. The COVID-19 pandemic was seen as a contributing factor, having limited young people's access to social and professional development experiences. Additionally, the rise of remote work has reduced opportunities for workplace social interactions, further impacting the development of these essential skills.

Other identified challenges included a lack of local support for entrepreneurship, a persistent emphasis on university pathways over vocational training, and concerns about the potential defunding of BTEC qualifications. The latter could significantly impact student pathways into key growth sectors such as engineering, exacerbating existing skills shortages. Addressing these gaps through targeted training, enhanced career guidance, and stronger employer-education collaboration will be essential for supporting the local labour market.

## Other challenges in the area

Beyond workforce and skills issues, consultees identified several broader challenges affecting the local economy and labour market:

- **Demographic Shifts** – The New Forest has an ageing population and a stagnant working-age population, with projections indicating little to no growth over the next decade. To sustain key services and industries, there is a need for strategies to attract new residents and workers, alongside initiatives that encourage older individuals to remain in the workforce longer.
- **Inequality and Deprivation** – Certain areas, including Totton, Waterside, New Milton, and Fawley, face higher levels of deprivation. A stronger focus on inclusive growth is needed to reduce barriers to employment for individuals from

disadvantaged backgrounds and ensure that economic opportunities are more evenly distributed across the district.

Addressing these challenges will require a combination of targeted workforce strategies, investment in infrastructure, and policies that promote social mobility and economic inclusion

## 4.3 Skills-related Opportunities

The following section explores stakeholder views on key opportunities for skills development in the New Forest. These have been grouped into four main areas:

- Growth Sectors – Identifying industries with strong potential for job creation and skills demand.
- Employer-Education Collaboration – Strengthening partnerships between businesses and training providers to align skills with industry needs.
- Improving Access – Addressing barriers to education, training, and employment.
- Training and Skills Models – Developing innovative approaches to upskilling and workforce development.

### Growth sectors

Stakeholders identified several key growth sectors in the New Forest that will require an expansion of skills provision to meet future workforce demands. These included:

- **Marine Engineering & Offshore Wind** – Engineering, particularly within the marine sector, was highlighted as a priority, given the New Forest's coastal location and the opportunities linked to the Freeport. Consultees pointed to the need for boatbuilding and maintenance skills, particularly in relation to the growing offshore wind industry and the broader push toward decarbonisation. Developing specialised training pathways in these areas could help position the region as a hub for sustainable maritime innovation.
- **Digital & Technology** – The digital sector was frequently mentioned as a fast-growing, high-value industry with significant potential for skills development. Consultees emphasised the importance of expanding training in areas such as artificial intelligence, social media, and emerging technologies, particularly as these align with the Freeport's ambitions to attract digital-focused investment.



Additionally, given the increasing digitalisation of job roles across multiple industries, there is an opportunity to support older workers in reskilling, ensuring they remain competitive in the evolving labour market.

### **Employer and Education collaboration**

Improving collaboration between employers and educational institutions was identified as a key priority for the New Forest. To bridge the gap between industry needs and skills provision, stakeholders proposed several initiatives aimed at fostering stronger connections and ensuring training aligns more closely with employer demands. These included:

- **Establishing a Formal Employer-Education Forum** - A recurring recommendation was the creation of a structured employer-education forum, bringing together local businesses and training providers on a semi-regular basis. This forum would serve as a platform for ongoing dialogue, enabling industry leaders to share insights on evolving skills needs, identify workforce gaps, and help shape education and training strategies. By fostering closer alignment between skills provision and industry demand, the forum would encourage a more proactive approach to workforce development, reducing the current lag between emerging industry needs and course offerings.
- **Employer Involvement in Course Design and Delivery** - Stakeholders also emphasised the importance of greater employer participation in shaping educational content. By directly involving businesses in course design, training providers can ensure that qualifications and curricula reflect real-world industry requirements. This could be further supported by inviting industry professionals to deliver guest lectures, share case studies, and provide hands-on insights into workplace expectations.
- **Promoting Dual Professionalism in Education** - Another key opportunity identified was the concept of "dual professionalism," where industry professionals contribute directly to teaching and training at local colleges and skills centres. This could involve professionals dedicating time—such as one day a month—to mentor students, provide hands-on demonstrations, or offer specialist insights into their field. By integrating industry expertise into education, students would gain practical knowledge and exposure to real-world work environments, enhancing their employability and workforce readiness.

## Improving Access to Training/Skills Products

Consultees identified several approaches to enhance access to training and skills development for New Forest residents, focusing on flexible learning models and sector-specific initiatives. These included:

- **Expanding Short, Focused Training Programmes** - There was strong support for increasing the availability of short, targeted training programmes designed to develop specific skills in a condensed timeframe. Example included were 'bootcamp'-style courses, particularly in digital skills, aimed at helping individuals, especially older workers, retrain or upskill in response to the growing digital demands across multiple job roles.
- **Supporting Adult Reskilling and Career Transitions** - With the rapid evolution of the labour market, particularly in response to technological advancements like artificial intelligence, consultees emphasised the need for expanded opportunities in adult reskilling. Providing accessible training pathways for career transitions would help ensure that workers can adapt to industry changes and maintain employability in a shifting economy.
- **Developing Skills Academies** - Stakeholders highlighted the potential for dedicated skills academies to address sector-specific shortages. One key opportunity identified was a Construction Skills Academy, given that many local residents currently travel to Eastleigh for construction training. Establishing a local academy could support a steady pipeline of skilled workers, providing hands-on training, apprenticeships, and industry-led courses to meet local construction needs.
- **A Hospitality School** was also proposed as a means to address skills shortages within the hospitality sector. Similar to the construction academy model, this initiative could provide structured training and practical experience to better prepare individuals for careers in hospitality.
- **Strengthening Careers Advice in Schools** - Several consultees expressed concerns about the limited availability of careers guidance for young people. Some noted that career services had been reduced in recent years, leaving students without sufficient advice on employment and training options. A more comprehensive and accessible careers service could help students make informed decisions about their future, reducing the risk of them becoming NEET (Not in Education, Employment, or Training). Strengthening career support in schools would ensure

that young people are better prepared to transition into the workforce or further education.

## 4.4 Skills Infrastructure and Policy Interventions

Consultations also focused on developing and discussing potential infrastructure or policy interventions that could help overcome some of the challenges identified earlier, as well as take advantage of the various opportunities for the New Forest.

### New Forest District Council Transformation Strategy

The NFDC Transformation Strategy, Future New Forest: Transforming Tomorrow Together (TTT) 2024-2028, underpins the NFDC Corporate Plan by setting out a plan to address challenges and achieve the plan's objectives.

The TTT acknowledges that the world is rapidly changing, and as such, presenting new challenges and areas of focus for the New Forest and its residents. This includes the rise of digitisation; rising costs and budget constraints; skills demand and gaps; and sustainability.

To ensure the council can deliver on its objectives, the strategy focuses on four key themes:

- Customer and digital services – focusing on a digital-first approach for service delivery.
- People and capabilities – ensuring skills are evolving and provision is available to meet new service designs and needs.
- Assets and accommodation – making a better use of assets and improving sustainability
- Finances and delivery – strengthening the management of finance, strategy and performance.

Within the Transformation Strategy, NFDC acknowledge the importance of ensuring council staff are well-equipped with the skills needed to meet new service needs. In doing so, there is an aim to invest in skills development, training and career progression opportunities, to allow for a resilient workforce.

Notably, the strategy highlights that district councils are facing skills gaps around digitisation, people management, managing change and commerciality. To ensure these skills gaps are addressed, there is a need for enhanced skill provision and training opportunities to be made available to council staff, to ensure future skills needs are met.

## **Invest 2035: The UK's Modern Industrial Strategy**

Invest 2035: The UK's Modern Industrial Strategy is the UK government's 10-year plan designed to drive sustainable and inclusive economic growth by focusing on eight high-potential sectors: advanced manufacturing, clean energy, creative industries, defence, digital technologies, financial services, life sciences, and professional and business services.

The strategy aims to create a pro-business environment, support high-potential clusters across the country, and deliver growth that is supportive of net zero, regional development, and economic resilience. It emphasises the need for long-term investment, innovation, and a stable regulatory framework to unlock the UK's full economic potential.

The Invest 2035 strategy could help shape the New Forest's future through its targeting of key growth sectors such as advanced manufacturing and clean energy.

As the New Forest looks to capitalise on its clean growth and decarbonisation opportunities, this strategy's emphasis on investment in regional development and innovation should ensure that local businesses and individuals are supported to develop the skills needed to thrive in these emerging industries.

## **Transport and Accessibility**

Several consultees suggested initiatives to address transport barriers in the New Forest, particularly for young people and those accessing education and training.

**Subsidised or Free Travel for Students and Trainees** - A commonly proposed solution was offering subsidised or free bus travel for young people and those attending local education institutions. This could be implemented through:

- Discounted bus or train tickets
- Shuttle services connecting key education and training centres
- Travel vouchers for students enrolled in specific courses or institutions

However, it was noted by many young learners in the workshop sessions that travel bursaries or subsidies do not sufficiently reduce financial barriers to education and employment.

**Improving Public Transport Connectivity** - There was also strong support for continued efforts to improve the frequency and coverage of public transport routes, particularly in underserved areas such as Calshot. Consultees emphasised the need for key stakeholders to advocate for better transport links, ensuring that education, training, and employment opportunities remain accessible to all residents.

### **Funding and Policy Support**

Expanding on the focus on young people and youth initiatives, consultees highlighted a lack of local funding for youth clubs and related programmes. Organisations like the Scouts were reportedly struggling with funding and volunteer shortages, while other youth services faced potential closure. Many felt that increasing investment in youth clubs, groups, and community initiatives could provide young people with more structured activities and opportunities to develop essential soft skills. These included:

**Strengthening Employer - Youth Engagement** - There were also suggestions for closer collaboration between youth clubs and local employers. This could involve work placements, skills workshops, or engagement initiatives that help young people develop career aspirations and workplace readiness.

**Embedding Skills Development in Public Sector Contracts** - Another proposal was introducing stronger skills-related conditionalities in construction contracts, particularly those procured by the council. Suggestions included:

- Requiring a minimum percentage of the workforce to be apprentices or trainees
- Mandating a set number of apprenticeship placements per £X millions of contract value
- Setting workforce upskilling targets, such as requiring employees to complete training or gain qualifications during the project
- Requiring contractors to collaborate with local colleges, participate in careers events, or offer work experience opportunities for students

**Expanding Careers Fairs and Events** - Finally, consultees emphasised the need for more careers fairs and industry engagement events in the New Forest. These events would help

students and job seekers connect with local employers, explore career options, and gain insights into industry skill requirements.

## 4.5 Stakeholder Workshops

As part of the consultation process, EKOS facilitated two workshops at the New Forest District Council offices in Lyndhurst. These sessions, held in November 2024 and February 2025, focused on:

- Identifying key challenges, opportunities, and potential solutions related to skills in the New Forest (first workshop).
- Developing and refining priorities and objectives for the Skills Action Plan (second workshop).

Workshop participants included members of local education institutions, business groups, the district council and the NFNPA.

Many of the key findings from the workshops aligned with feedback gathered during one-on-one interviews, highlighting the following themes:

### Key Findings

#### 1. Transport as a Barrier to Skills Access

Workshop participants echoed concerns raised in the wider consultation that transport in the New Forest is infrequent, expensive, and lacks comprehensive coverage. This was recognised as a significant barrier to skills access, particularly for young people and those without private transport. Potential solutions discussed included:

- Subsidised transport for students and trainees
- Advocacy for expanded public transport routes
- Transport vouchers provided by education institutions

#### 2. Strengthening Employer-Education Collaboration

Feedback from the EKOS employer survey reinforced the need for stronger links between education providers and local businesses. Workshop attendees emphasised that better

collaboration is required to shape training programs, ensuring they align with industry needs.

### **3. Establishing a Local Skills Group**

There was broad agreement on the value of creating a dedicated skills group comprising local stakeholders including employers, education institutions, local authorities, and community organisations. This group would provide strategic oversight, drive collaboration, and ensure training provision aligns with workforce demands.

### **4. Embedding Nature-Positive Solutions in the Transition to Net Zero**

The integration of nature-positive solutions in the transition to net zero is essential for ensuring that economic growth aligns with environmental sustainability. Equipping individuals with the knowledge, training, and expertise to work in industries that protect, restore, and enhance natural ecosystems will support the transition to a low-carbon economy while addressing biodiversity loss and climate resilience.

The New Forest's unique natural environment presents significant opportunities for skills development in land management, conservation, and biodiversity restoration, alongside sustainable industries such as renewable energy and eco-tourism.

### **Key Areas for Skills Growth**

#### **1. Education and Training Programs**

- Expanding vocational training and apprenticeships in land management, forestry, habitat restoration, and environmental conservation.
- Embedding biodiversity conservation, rewilding, and ecological monitoring into existing environmental science and agriculture courses.
- Developing short courses or bootcamps focused on sustainability in industries such as construction, tourism, and agriculture.

#### **2. Green and Net-Zero Careers**

- Training individuals for roles in renewable energy engineering, including offshore wind, solar, and sustainable construction.

- Providing opportunities for workers to transition into nature-based jobs, such as environmental consultancy, sustainable farming, and conservation project management.
- Supporting reskilling initiatives for traditional land-based workers (farmers, foresters, etc.) to adopt regenerative agriculture and agroforestry.

### 3. Integrating Nature-Positive Practices into Key Sectors

- Encouraging skills development in eco-friendly tourism and sustainable hospitality, particularly in areas like the New Forest where tourism is a significant employer.
- Training professionals in sustainable construction to use nature-based solutions, such as green roofs, sustainable drainage systems, and biodiversity-friendly urban design.
- Promoting circular economy skills, such as waste reduction, ecosystem restoration, and low-carbon material innovation.
- Enhancing skills in biodiversity loss mitigation, including species conservation, rewilding, and environmental monitoring.

### 4. Industry Collaboration and Workforce Development

- Creating green apprenticeships and work placements in conservation, environmental restoration, and renewable energy sectors.
- Encouraging employers to integrate biodiversity action plans and sustainability criteria into workforce development.
- Establishing partnerships between local businesses, education providers, and industry leaders to align training programs with sustainability goals.

### 5. Policy and Funding Support

- Advocating for funding incentives for education providers and employers offering training in nature-positive skills.
- Embedding nature-positive solutions in local and regional economic development strategies.
- Strengthening career pathways into green jobs by supporting careers fairs, employer engagement initiatives, and outreach programs.



## Impact and Long-Term Benefits

By embedding nature-positive and environmental skills within training and education programs, the New Forest can future-proof its workforce, support net-zero and biodiversity goals, and enhance economic resilience through sustainable growth.

### 1. Prioritising In-Demand Skills

- The workshops highlighted a need to increase the focus on digital skills and “meta-skills” (e.g., adaptability, problem-solving, communication) as core components of future skills provision. These were identified as key growth sector requirements, where current training availability is limited.

### 2. Targeting Support for Young People, Particularly NEET Individuals

- It was agreed that young people—particularly those classified as NEET (Not in Education, Employment, or Training)—should be a key target group for skills interventions, with tailored programs to improve their access to training and employment opportunities.

### 3. Supporting Older Workers (50+) in Upskilling and Career Transitions

- Recognising the New Forest’s ageing population, workshop attendees agreed that workers aged 50 and over should be a priority group for upskilling, retraining, and career transition support.

### 4. Raising Awareness and Uptake of Apprenticeships

- Both the workshops and one-on-one consultations highlighted low awareness and uptake of apprenticeships in the New Forest. Attendees agreed on the need for a stronger push to promote apprenticeships and make them more visible, ensuring they are seen as a viable pathway for both young people and career changers.
- These key findings will help shape the priorities of the New Forest Skills Action Plan, ensuring a targeted, effective response to the region’s workforce challenges.

These key findings will help shape the priorities of the NFSAP, ensuring a targeted, effective response to the region's workforce challenges.

## 4.6 Learner Sessions

In March 2025, EKOS conducted two workshops with learners at Totton College and Brockenhurst College. In total, there were 20 young people in attendance across two sessions from a range of subject. course types and levels – this included: Law, Government and Politics, History, Biology, Geography, Media, Sport and Exercise Science, English Literature, Spanish, Music, Hairdressing, Marketing, Business, and Media.

Over half of the participants were from the New Forest - the rest were from Poole, Bournemouth or Christchurch. There are a high proportion of students from these areas. Around half of the participants used public transport (mostly for Brockenhurst College), with 26% reliant on private transport and 21% walking to college.

After their studies, most are planning to attend university, and some are interested in degree apprenticeships. To a lesser extent, there was interest in starting their own business and wanting to move abroad.

### Desire to Leave the New Forest

The majority of young people expressed a strong inclination to leave the New Forest upon completing their studies. Key reasons included:

- Better job opportunities elsewhere – many felt that high-quality, well-paid jobs with career progression, particularly within their chosen sectors, were more accessible outside the region.
- Cost of living and housing affordability – students highlighted concerns about rising house prices, noting that they would be unable to afford to live in the New Forest at the start of their careers.
- Limited social opportunities – many young people felt that social activities and spaces in the New Forest cater more to older residents. As a result, they frequently travel to Southampton for socialising.

### **Need for More Apprenticeships, Vocational Training and Work Experience**

Learners emphasised the importance of increasing local apprenticeship opportunities, vocational training, and work experience to increase the career pathways available to them and to improve their understanding of local career opportunities. Several students noted that work experience within the New Forest is limited in scope, lacking diversity across sectors and job types.

### **Stronger Employer Engagement with Schools and Colleges**

A key recommendation was to promote greater collaboration between local businesses and educational institutions to better prepare young people for the workforce.

Suggestions included:

- Guest lectures and industry talks to showcase career pathways and progression opportunities within local businesses.
- Stronger employer-school partnerships to improve access to work experience and apprenticeships.
- Incentives or support for businesses to engage with schools and colleges, as many may struggle to dedicate time and resources to outreach efforts.

### **Transport as a Barrier to Employment and Education**

Many students raised concerns about public transport accessibility and cost, which could limit their job prospects. Key challenges included:

- Inconvenient routes and connectivity issues – in some cases, young people must travel from the New Forest to Southampton before accessing onward transport to their destination.
- High transport costs – many stated that existing travel bursaries or subsidies do not sufficiently reduce financial barriers to education and employment.

## 5 Priority Actions – further details

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### Theme 1: Aligning Skills with Emerging Opportunities

**Objective:** Ensure the workforce is prepared to capitalise on emerging opportunities, particularly those arising from the transition to a low-carbon economy.

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#### Actions

**Solent Freeport Skills Training:** T1.1 Develop and promote training programmes that focus on trade, innovation, and job creation within the Solent Freeport.

**Green Technologies and Renewable Energy:** T1.2(a) Offer specialised courses and certifications in renewable energy (solar, wind, etc.), green technologies, and sustainable practices. T1.2(b) Encourage training pathways in energy efficiency, waste reduction, and low-carbon technologies.

**Nature Positive Net Zero Transition:** T1.3 Implement training and development programmes focused on carbon reduction strategies, nature-based solutions, and sustainable land management practices.

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### Theme 2: Supporting Established Sectors

**Objective:** Strengthen the workforce in key sectors, ensuring they are equipped with the necessary skills to meet current and future demands.

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#### Actions

**Hospitality and Tourism:** T2.1 Develop and expand training programmes in customer service, hospitality management, and tourism, with a focus on improving visitor experiences and supporting sustainable tourism practices.

**Health and Social Care:** T2.2 Provide targeted training programmes for healthcare professionals and social care workers, addressing the growing demand for these services.

**Construction and Carpentry:** T2.3 Expand training opportunities in construction trades such as plumbing, electrics, carpentry, and plastering, as well as other technical skills needed for local infrastructure projects.

**Renewable Energy Installation:** T2.4 Create courses on renewable energy system installation and maintenance (e.g., solar panels, wind turbines).

**Conservation, Land & Forestry Management:** T2.5(a) Offer training in Geographic Information Systems (GIS), remote sensing, and emerging technologies to support forest and land management, including peatland restoration. T2.5(b) Encourage further development in wildlife management and sustainable forestry practices.

**Manufacturing, Engineering, and Marine:** T2.6 Provide training pathways in advanced manufacturing, engineering, and marine industries, focusing on skills in shipbuilding, marine engineering, and production of marine equipment.

**Retail:** T2.7(a) Develop career progression training and work-based learning opportunities to ensure resilience in the retail sector. T2.7(b) Create pathways for career advancement in retail management and sales.

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## Theme 3: Lifelong Learning and Upskilling

**Objective:** Ensure continuous skill development to help residents adapt to the evolving job market and enhance employability.

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### Actions

**Adult Education Expansion:** T3.1 Increase access to adult education programmes, including literacy and numeracy, vocational qualifications, and life skills courses to support career progression and adaptability.

**Digital Literacy and Advanced IT Skills:** T3.2 Ensure access to courses on digital literacy, programming, and advanced IT skills to prepare the

workforce for digital roles in the tech-driven economy. Offer certifications in areas such as cybersecurity, data analysis, and cloud computing.

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## Theme 4: Collaboration and Community Engagement

**Objective:** Foster partnerships to create a cohesive, community-driven skills development strategy that avoids duplication and addresses gaps in provision.

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### Actions

**Partnerships & Collaboration:** T4.1 Strengthen collaboration and alignment around skills between local employers, schools, colleges, training providers, local authorities, businesses, and community organisations to shape curriculum, offer placements, and influence strategic skills planning.

**Community Needs Assessment:** T4.2 Engage the community to assess skills gaps and identify training opportunities, ensuring the workforce meets the specific needs of local businesses. Encourage consultation through town halls, surveys, and community meetings.

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## Theme 5: Inclusive Growth

**Objective:** Ensure equality of access to skills development opportunities and target support for vulnerable and marginalised priority groups.

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### Actions

**Support Vulnerable Groups:** T5.1 Develop targeted initiatives for individuals facing barriers to employment, including NEETs (Not in Education, Employment, or Training), the 50+, people living with disabilities, and ethnic minorities.

**Gender Equality:** T5.2 Promote gender equality by ensuring women have equal access to training programmes and resources that lead to career and self-employment opportunities. Develop mentorship programmes for women in male-dominated sectors.

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## Theme 6: Business and Entrepreneurship

**Objective:** Encourage entrepreneurship and support local businesses with the skills needed for success and growth.

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### Actions

**Self-Employment and Business Startups:** 6.1.(a) Promote entrepreneurial activity in the New Forest by providing access to financial support, grants, and resources for starting a business. 6.1. (b) Develop networking opportunities and business incubators, particularly for excluded groups (young people, women, NEETs, and career changers).

**Business Management Skills:** 6.2. Offer courses in business planning, financial management, and marketing to equip local entrepreneurs with the skills to grow and manage their businesses.

**Leadership and Communication Training:** 6.3 Create programmes focused on leadership development, team management, and effective communication to build stronger local leaders and improve business management.

**Mitigation for Displacement:** 6.4 Mitigation and support for businesses who may lose people as part of the upskilling and reskilling.

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## Theme 7: Monitoring and Evaluation

**Objective:** To systematically track, assess, and report on the effectiveness of initiatives, ensuring continuous improvement, accountability, and alignment with strategic goals.

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### Actions

**Establish Clear Metrics and Indicators.** Define specific, measurable, achievable, relevant, and time-bound (SMART) indicators to track progress across all key action areas, such as: number of training programmes delivered in key sectors (e.g., renewable energy, construction, tourism); number of individuals completing skills training and certifications; job placement rates and career progression outcomes (e.g., promotion, entrepreneurship); levels of participation from priority target groups; business growth and startup success rates; and implement regular data collection.

**Set up a system for collecting quantitative and qualitative data regularly from skills group partners** to monitor programmes performance. This may include surveys and feedback from participants on the relevance, quality and impact of training; employer feedback on effectiveness of skills training and job preparedness of graduates; and data on job placements, retention, and wage growth post-training.

**Conduct Periodic Evaluations.** Organise evaluations to assess whether activities are meeting the needs of local businesses and individuals. Evaluation methods may include reviewing progress reports and comparing results against baseline data; analysing employment outcomes for individuals who have completed training; tracking the adoption and impact of new skills on business performance and community development; and use evaluation results to identify areas for improvement, adjustments and to inform future strategy.

**Engage Stakeholders in the Evaluation Process.** Involve key stakeholders, including local authorities, business leaders, educational institutions, and community organisations, in both monitoring and evaluation activities. Actions include regular meetings and feedback sessions to review progress and gather input; advisory groups or steering committees to guide evaluation and ensure alignment with community needs; engaging participants in focus groups to gather qualitative insights on effectiveness of training programmes.

**Use Technology for Real-Time Monitoring.** Leverage technology, such as a skills development dashboard, to track real-time progress on key indicators. This can include monitoring training completion rates; participant demographics, and skills areas being addressed; and analysing workforce demand data to predict future skills gaps and training needs.

**Assess Long-Term Impact.** In addition to short-term outputs, conduct long-term assessments to measure the lasting impact of skills training on the New Forest economy.

**Continuous Improvement and Adaptation.** Use the insights gained from monitoring and evaluation to continuously improve the skills action plan. This may involve adjusting training curriculum to address emerging skills needs or gaps; updating training programmes to keep pace with technological and market changes; strengthening partnerships based on collaborative feedback from stakeholders

**Develop an annual report detailing the achievements, challenges, and lessons learned from the monitoring and evaluation process.** This report should be shared with stakeholders and the community to maintain transparency and accountability. Use the annual report to refine the skills action plan, ensuring it remains relevant and responsive to local and regional economic developments.

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## 6 Conclusions from research and engagement

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### Persistent Skills Gaps Across Key Sectors

The visitor economy, construction, health and social care, retail, engineering, and land-based sectors (including forestry and conservation) continue to experience significant skills shortages. These gaps are driven by several factors, including difficulties in attracting and retaining talent due to relatively low wages, a high prevalence of part-time and seasonal roles, and an ageing workforce with limited succession planning. Additionally, the availability of relevant training and apprenticeship opportunities remains a challenge, with some sectors struggling to recruit younger workers or reskill existing employees.

Addressing these persistent shortages requires a coordinated approach, including enhanced career pathways, stronger employer engagement, and targeted skills development initiatives to ensure a sustainable and skilled workforce for the future.

### Underutilised Apprenticeships and Alternative Training Pathways

Despite being a valuable workforce development tool, apprenticeships in the New Forest are underutilised due to low awareness and engagement among both young people and employers. Many potential apprentices are unaware of available opportunities, career pathways, and the benefits of earning while learning. At the same time, some employers, particularly smaller businesses, may lack the resources, guidance, or incentives to take on apprentices. Addressing these barriers through targeted promotion, employer engagement, and support for apprenticeship delivery could help increase participation and strengthen the local talent pipeline.

More flexible training models, including short courses and bootcamps, are needed to support career transitions and lifelong learning – these models are in increasing demand and highly valued by employers.

## **Transport Barriers Limit Access to Skills Development**

Limited public transport connectivity and high travel costs present significant barriers to skills development in the New Forest. Young people, those in rural areas, and individuals without access to private transport often struggle to reach colleges, training centres, and workplaces. This lack of affordable and reliable transport reduces participation in apprenticeships, vocational training, and further education, ultimately restricting career progression and economic mobility. Additionally, businesses may find it harder to attract talent from a wider area due to commuting challenges. Addressing these issues requires investment in improved transport links, enhanced subsidy schemes, and local training opportunities that minimise the need for long and costly commutes.

## **Need for Greater Employer and Education Collaboration**

Stronger partnerships between businesses, education providers, and training organisations are crucial to closing skills gaps and ensuring local talent is equipped for current and future workforce demands. Employers can play a key role by shaping curriculum content, offering work placements, and engaging in mentoring programs to give learners real-world insights. Improved collaboration would also help ensure that training provision remains responsive to emerging industry trends, particularly in sectors like tourism, construction, health and social care, and marine, land and nature-based industries. Additionally, better engagement between schools and businesses could increase awareness of career pathways, apprenticeships, and local job opportunities, helping to retain young talent in the New Forest.

## **Growing Demand for Green and Nature-Positive Skills**

The transition to a net-zero economy, alongside increasing focus on biodiversity conservation and climate resilience, is driving demand for specialist skills across multiple sectors. Opportunities are emerging in land management, rewilding, sustainable tourism, and ecological restoration, requiring expertise in conservation practices, habitat restoration, and environmental monitoring. Additionally, the shift towards green construction and renewable energy, such as offshore wind, solar, and sustainable building materials, creates a need for skilled workers in eco-friendly design, energy efficiency, and low-carbon infrastructure. To meet this growing demand, investment in training, upskilling, and employer engagement will be essential, ensuring that the local workforce is equipped with the skills needed to support the region's sustainability ambitions.

## Limited Support for Adult Reskilling and Upskilling

As the workforce ages and industries evolve, many adults face challenges in adapting to shifting job market demands. There is a growing need for accessible, flexible, and industry-relevant reskilling and upskilling opportunities, particularly in key sectors such as health and social care, retail, digital skills, forestry, land and nature-based jobs, and emerging renewable technologies. However, barriers such as cost, time constraints, and limited awareness of available training programmes prevent many workers from accessing these opportunities. Strengthening support for lifelong learning through employer-led training, micro credential courses, and targeted funding could help ensure that the local workforce remains adaptable, competitive, and equipped with the skills needed for the future economy.

## Need for More Targeted Support for Young People and Retention in the New Forest

Many young people in the New Forest, particularly those at risk of becoming NEET (Not in Education, Employment, or Training), lack clear career pathways and access to high-quality careers advice. This has contributed to outmigration, with many young people leaving the area in search of better education, training, and employment opportunities elsewhere. To address this, more targeted support is needed to both engage young people in skills development and encourage their retention in the local workforce. There is a need to increase local apprenticeships and training opportunities and to promote the New Forest as an attractive place to live and work.

- Work with local businesses and the NFDC to increase awareness of career opportunities available in the area.
- Develop marketing campaigns showcasing career progression opportunities, quality of life, and affordability of living in the New Forest compared to nearby cities.
- Encourage businesses to offer graduate retention schemes and incentives for young professionals to stay in the region.

## Self-Employment is high in the New Forest Creating Vital Job Opportunities

Self-employment in the New Forest is relatively high. As of 2024, 11.5% of the employed population in the New Forest were self-employed, compared to the Hampshire average of 10.6%. Up until 2022 the New Forest was significantly higher than the England average. This higher-than-average rate of self-employment reflects its diverse and entrepreneurial economy. The New Forest has fewer large employers, meaning self-employment and small businesses are creating vital job opportunities and providing services and products that sustain the New Forest such as, agriculture and forestry, tourism and retail.

By investing in targeted support for young people and creating clear career pathways, the New Forest can retain more of its younger workforce, ensuring a skilled and sustainable future talent pipeline.