

## EXECUTIVE

YOU ARE REQUESTED TO ATTEND A MEETING OF THE EXECUTIVE TO BE HELD IN THE JOHN MEIKLE ROOM, THE DEANE HOUSE, BELVEDERE ROAD, TAUNTON ON WEDNESDAY 15TH OCTOBER 2008 AT 18:15.

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### **AGENDA**

1. Apologies.
2. Public Question Time.
3. Declaration of Interests. To receive declarations of personal or prejudicial interests, in accordance with the Code of Conduct.
4. Treasury Management Update 2008/2009 and Minimum Revenue Provision. Report of the Principal Accountant (attached). Steve Murphy
5. Asset Management Plan Review : September 2008. Report of the Corporate Property Officer (attached) George Stark
6. Proposed revisions to the Residents' Parking Scheme in Taunton. Report of the Parking and Civil Contingencies Manager (attached). John Lewis
7. Draft revised Regional Spatial Strategy for the South West incorporating the Secretary of State's proposed changes. Report of the Forward Plan Manager (attached). Ralph Willoughby-Foster
8. A Review into Co-ordination of Services for Older People in Taunton Deane. The final report of the Co-ordination of Services for Older People Task and Finish Group is attached for consideration and approval.

Tonya Meers  
Legal and Democratic Services Manager  
07 October 2008

Executive Members:-

Councillor Henley (Chairman)

Councillor Brooks

Councillor Coles

Councillor Horsley

Councillor R Lees

Councillor Mullins

Councillor Prior-Sankey

Councillor Mrs Smith

Councillor A Wedderkopp



Members of the public are welcome to attend the meeting and listen to the discussion. Lift access to the main committee room on the first floor of the building is available from the main ground floor entrance. Toilet facilities, with wheelchair access, are also available. There is a time set aside at the beginning of the meeting to allow the public to ask questions



An induction loop operates to enhance sound for anyone wearing a hearing aid or using a transmitter. If you require any further information, please contact Greg Dyke on:

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Fax: 01823 356329  
E-Mail: [g.dyke@tauntondeane.gov.uk](mailto:g.dyke@tauntondeane.gov.uk)

Website: [www.tauntondeane.gov.uk](http://www.tauntondeane.gov.uk) (Council, Executive, Review Board & Review Panel Agenda, Reports and Minutes are available on the Website)

# Taunton Deane Borough Council

Executive - 15 October 2008

## Report of the Principal Accountant

This matter is the responsibility of Executive Councillor Henley (Leader of the Council)

## Treasury Management Update 2008/2009 and Minimum Revenue Provision

### Executive Summary

- The following report provides a brief narrative on the Treasury activity of the Council in the first six months of 2008/09, focussing primarily on debt and investments. In addition, there is a short description and request to approve / recommend, to the next full Council, officers preferred options in relation to Minimum Revenue Provision (MRP), as required by recent changes to regulation surrounding this item.

### 1. Purpose of the Report

- 1.1 To update the Executive on Treasury activities in the financial year to date and seek approval of the methods for calculating Minimum Revenue Provision (MRP).

### 2. External Debt

- 2.1 Analysis of the Councils' Debt: -

<b>31<sup>st</sup> March 2008 £'000</b>		<b>30<sup>th</sup> Sept 2008 £'000</b>
18,005	Public Works Loan Board	18,003
3,000	Barclays Bank	3,000
7	Parish Council / Local Trust Loans	0
<u>2,000</u>	Temporary Loans (PWLB)	<u>2,000</u>
<b><u>23,012</u></b>		<b><u>23,003</u></b>

- 2.2 A further £2.003m will be repaid to the PWLB in March 2009 (£2m temporary borrowing) leaving the anticipated closing position at exactly £21m.

### 3. Interest Rates

- 3.1 Since the update report in June this year, the Bank of England has maintained rates at 5.00%.

### 4. Interest Rate Prospects

- 4.1 The Bank of England's stance on interest rates have been driven by concerns over inflation (currently CPI 4.7%) which is anticipated to rise further in the short term before easing towards, but probably remaining over, the 2% target during 2009/10.
- 4.2 Despite the above, the current 'credit crunch' and concerns over the exposure to 'toxic waste' of even the most sound and respected institutions, has resulted in a reluctance of banks to lend to one another, pushing lending rates for the period of one month to one year (typical TDBC lending period) in the range of 6.15% - 6.50%. Until this situation is resolved, rates available in the market will continue to be well in excess of bank base.

#### **4. Borrowing Transactions**

- 4.1 There are no plans currently to borrow further. The Council's capital programme is fully financed either with cash resources, or borrowing made in earlier periods.
- 4.2 Temporary borrowing remains a possibility should cash flows require it but at the time of reporting officers do not consider this to be likely in the immediate future.

#### **5. Investment Transactions**

- 5.1 Current outstanding investments amount to £24.185m. Details of these can be found in appendix A.
- 5.2 The average rate of interest achieved when investing surplus funds for the first six months of 2008/09 has been in the range of 4.10% - 6.38%, with the weighted average at 5.83%. This equates to approximately £720k in interest income both received and receivable.

#### **6. Prudential Indicators**

- 6.1 Prudential Indicators following the closure of accounts for 2007/08 have now been calculated and estimates for 2008/09 and beyond can now be found in Appendix B

#### **7. Minimum Revenue Provision (MRP)**

- 7.1 On the 31<sup>st</sup> March 2008, the Government introduced amended legislation to deal with the statutory requirement for authorities to make an annual provision from revenue, for the repayment of borrowing undertaken for purposes of financing capital expenditure. This annual provision, known as Minimum Revenue Provision (or MRP) is a largely technical calculation, with the intention of government to make it easier to deal with, and more in line with proper accounting practices.
- 7.2 Rather than prescribe an approach, the Government has offered four options, two for situations where borrowing is undertaken with support

from Central Government, meaning where money is given to support the cost of the interest payments on debt, and a further two options where borrowing is undertaken by authorities without this support. In practical terms these options are academic at this authority, being simple variants along similar themes and have little impact on the 'bottom line'. The choice may have a greater impact at other authorities, hence the availability of options.

7.3 Options:

- For supported borrowing authorities can choose between the technically demanding and cumbersome method in current use (option 1) or a simple 4% on outstanding debt (option 2).
- For unsupported borrowing however, the options are; (3) debt associated with asset purchased / created, divided by the expected life of the asset (Asset Life Method) or (4) use depreciation as a proxy for the provision to be made.

7.4 Treasury officers recommend that options 2 & 3 are selected as the most appropriate methods for this authority given that they are the simplest to understand and calculate and that there is no material impact on the Council's 'bottom line'

**8. Recommendation**

- 8.1 The Executive is requested to note the treasury management position for the first six months of 2008/09.
- 8.2 Treasury officers also request that the Executive approve the options recommended in section 7, with a view to recommending these for adoption at the next Full Council Meeting.

**Background Papers:**

Treasury Management & Investments Strategy 2008/09, Executive 5<sup>th</sup> March 2008.

Treasury Management Outturn 2007/08 and Update 2008/09, Executive 18<sup>th</sup> June 2008.

Department of Communities & Local Government, web link to commentary regarding MRP regulation.

<http://www.local.communities.gov.uk/finance/capital/amdregletcon.pdf>

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## Appendix A

### Investments Outstanding At 1<sup>st</sup> October 2008 (In Maturity Order)

<b>Borrower</b>	<b>Amount £</b>	<b>Rate of Interest %</b>	<b>Date of Investment</b>	<b>Date of Maturity</b>
Stroud & Swindon B S	1,000,000	6.05%	04-Apr-08	06-Oct-08
Cheshire B S	1,000,000	6.01%	04-Apr-08	06-Oct-08
DMO (UK Gov't)	2,000,000	4.10%	01-Oct-08	16-Oct-08
Allied Irish Bank	1,000,000	5.68%	31-Jul-08	20-Oct-08
DMO (UK Gov't)	2,000,000	4.40%	01-Oct-08	31-Oct-08
West Bromwich B S	1,000,000	5.79%	06-Aug-08	14-Nov-08
West Bromwich B S	1,000,000	5.70%	20-Aug-08	14-Nov-08
Britannia B S	1,000,000	5.71%	20-Aug-08	14-Nov-08
Britannia B S	1,000,000	5.71%	01-Sep-08	01-Dec-08
Yorkshire B S	1,000,000	5.71%	05-Sep-08	05-Dec-08
Principality B S	1,000,000	5.83%	22-Aug-08	15-Dec-08
Bank of Ireland	1,000,000	5.77%	12-Sep-08	31-Dec-08
Skipton B S	1,000,000	5.78%	02-Sep-08	02-Jan-09
Nottingham B S	1,000,000	5.45%	10-Jan-08	12-Jan-09
Allied Irish Bank	1,000,000	5.83%	12-Sep-08	22-Jan-09
DEPFA Bank	1,000,000	5.80%	12-Sep-08	22-Jan-09
Coventry B S	1,000,000	5.74%	09-Apr-08	08-Apr-09
Chelsea B S	500,000	5.74%	09-Apr-08	08-Apr-09
Royal Bank of Scotland	1,000,000	6.38%	25-Jun-08	25-Jun-09
Abbey Business Reserve	2,000,000	Variable	On Demand	
RBS Money Market Fund	1,685,000	Variable	On Demand	
<b>TOTAL</b>	<b>24,185,000</b>			

## Appendix B

PRUDENTIAL INDICATOR	2007/08 Out turn	2008/09 Estimate	2009/10 Estimate	2010/11 Estimate
<b>Capital Expenditure</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
General Fund	3,761	3,946	1,566	3,177
Housing Revenue Account	4,399	5,082	5,265	5,450
Authority Total	8,160	9,028	6,831	8,627
<b>Ratio of financing costs to net revenue stream</b>	<b>%</b>	<b>%</b>	<b>%</b>	<b>%</b>
General Fund	-0.57	-1.54	-1.51	-1.46
Housing Revenue Account	2.83	4.49	4.25	4.02
<b>Net borrowing requirement</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Brought forward 1 <sup>st</sup> April	6,689	5,405	7,940	7,940
Carried Forward 31 <sup>st</sup> March	5,405	7,940	7,940	7,940
In-year borrowing requirement	-1,284	2,535	0	0
<b>Capital Finance Requirement</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
General Fund	6,642	8,911	8,555	8,212
Housing Revenue Account	14,451	14,451	14,451	14,451
Authority Total	21,093	23,362	23,006	22,663
<b>Incremental impact of capital investment decisions</b>	<b>£ / p</b>	<b>£ / p</b>	<b>£ / p</b>	<b>£ / p</b>
Increase in Council Tax (Band D Equivalent)	0	0	5.59	5.44
<b>Authorised limit for external debt</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Authority total	40,000	40,000	40,000	40,000
<b>Operational boundary for external debt</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>	<b>£'000</b>
Authority total	30,000	30,000	30,000	30,000
	<b>V % / F %</b>	<b>V % / F %</b>	<b>V % / F %</b>	<b>V % / F %</b>
Upper limits for variable / fixed rated borrowing and investments	50 / 100	50 / 100	50 / 100	50 / 100
<b>Upper limit for total principal sums invested with a single counterparty</b>	<b>£2m / 20%</b>	<b>£2m / 20%</b>	<b>£2m / 20%</b>	<b>£2m / 20%</b>



## **Taunton Deane Borough Council**

### **Asset Management Plan (AMP) Review : September 2008**

#### **Report of the Corporate Property Officer to the meeting of the Executive – 15 October 2008**

(This matter is the responsibility of Executive Councillor J Horsley)

##### **Executive Summary**

The review of the Asset Management Plan as mentioned in the early 2008 update has now been completed. The new document covers the following areas:

The Property Portfolio  
Financial Context  
Business Aims and Objectives  
Review of Current Property Assets  
Key Activities 2009/10

#### **1. Background**

- 1.1 The Asset Management Plan (AMP) is a key corporate planning document, and as such is refreshed on an annual basis.
- 1.2 A thorough review of the format and content of the Asset Management Plan (AMP) has now been completed (September 2008) An executive summary containing all the key points is included at Appendix 'A'.
- 1.3 In pursuit of its priority outcomes the Council is continuing an exercise where it is reviewing all the property that it owns. It has to decide whether it is still relevant to own; policy needs to be reviewed in order to achieve consistency of objectives over the long term; and particularly, strategic decisions will be required in order to drive asset development.

#### **2 Future AMPs**

- 2.1 Future AMP's will continue to reflect best practice; is focussed on the Council's priorities and enables the Council's property assets to optimise their contribution to corporate goals; improve service delivery and return capital and revenue returns.

- 2.2 The Borough Council recognises the corporate and strategic importance of good management of its land and property estate, whilst ensuring the property portfolio is suitable for the delivery of the Council's responsibilities. It is the intention to ensure sustainable capital returns and revenue income can be achieved. Regular systematic reviews of all Council assets will be undertaken, with all opportunities being reviewed via options appraisals and life cycle costs.

### **3 Recommendations**

- 3.1 The Executive is recommended to approve the September 2008 review of the Asset Management Plan.

George Stark  
Corporate Property Officer  
Tel: 01823 356512



## TAUNTON DEANE BOROUGH COUNCIL

## APPENDIX A

### ASSET MANAGEMENT PLAN – EXECUTIVE SUMMARY

#### Contents:-

1. Introduction
2. The Property Portfolio
3. Financial Context
4. Business Aims and Objectives
5. Review of Current Property Assets
- 6 Key Activities for 2009/2010
7. Conclusion

#### 1. Introduction

- 1.1 The AMP group was formed in 2000 under the responsibility of the Executive Portfolio Holder for Economic Development and the Corporate Property Officer, following directives from central government. All Local Authorities were required to produce AMPs for submission to the Government in 2001.
- 1.2 Following a “poor” assessment in 2001, the 2002 AMP submission was awarded a “good” rating. Not only did this give Taunton Deane an extra £50,000 in capital spending approvals but it further meant that Taunton Deane was not required to submit any further AMPs to Central Government.
- 1.3 Taunton Deane has continued to produce AMPs albeit modified to suit the Council's wishes and priorities.
- 1.4 As alluded to earlier, those sections within the Council undertaking property management functions have been restructured and brought together as one team – Property Services. The Report by the Strategic Director on the restructure was submitted to and approved by the Executive on 24 May 2005. The new group consisted of a Facilities Team, a Maintenance and Design Team, an Asset Holdings Team, and a Geographical Information Systems Team. In 2006 the Facilities Team was removed from Property Services. The group has the responsibility of producing the AMP and ensuring the Council's assets are properly maintained and wishes of Members are carried out. The Facilities Team was brought back into Property Services in the

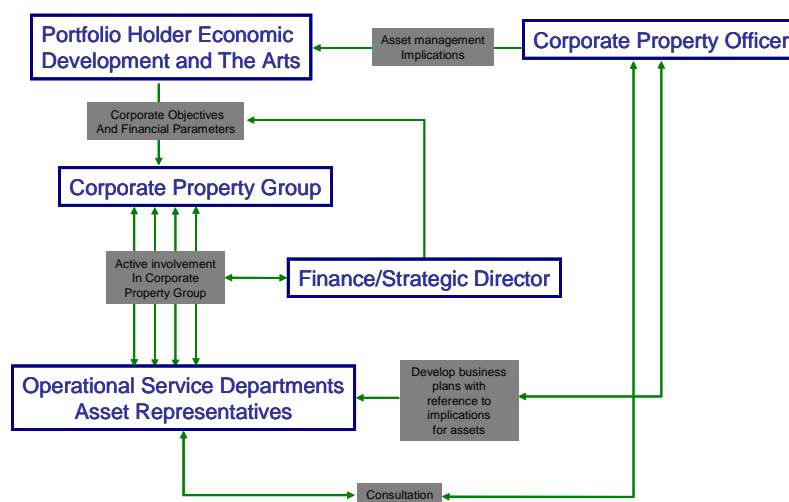
beginning of June 2008. Taunton Deane Property services, with the exception of the Facilities Team, move to County Hall in July 2008. The Facilities Team remained at the Deane House.

- 1.5 The AMP is the corporate statement about how the Council will use its property asset resources to contribute to fulfilling its corporate priorities. These include operational property, community assets, infrastructure assets and non-operational property; all require to be managed in an effective way.

Property assets are expensive in terms of capital and revenue; they need to be carefully managed over their life to ensure best value in terms of utilisation, maintenance and income generation; and the procurement and delivery of new property assets is a long process which can be expensive in terms of abortive costs and staff resources.

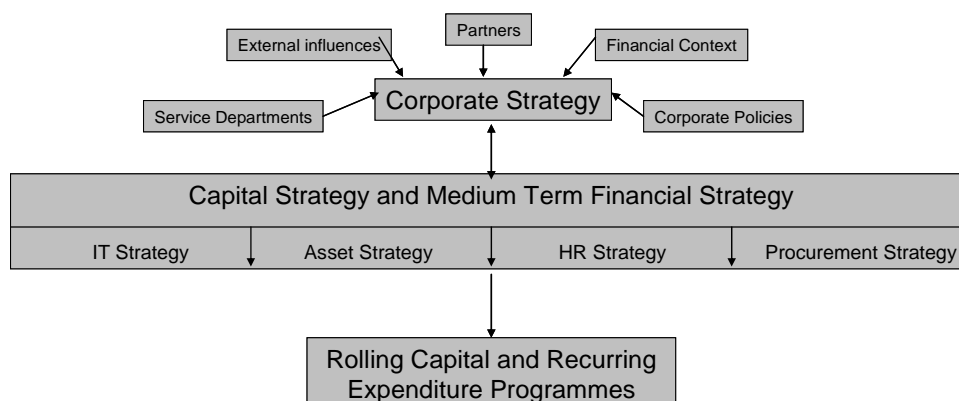
It is the Council's intention to keep the AMP as flexible and responsive as possible so that the property assets can assist in the pursuit of corporate objectives.

To ensure that property matters are kept at the forefront of the strategic overview and management of the Council's priorities the Corporate Property Group take the corporate objectives and integrate them with the portfolio planning.



The Heads of Service have responsibility for defining their own operational requirements for service delivery and report to the AMP group annually on the use of assets within their service. This information enables finance/actions to be followed to ensure that best value is obtained by the optimum use of buildings.

The AMP is the link between the property portfolio and the Corporate Structure to facilitate better delivery of the Council's key objectives and priority outcomes:



A key message recognised by the Council is that property should be managed in a commercial way to ensure value for money, efficiency and effectiveness.

## 2. The Property Portfolio

The Council has an asset base of over £59.507 million, including £15.88 million of non-operational properties of which it holds an investment portfolio of £12.38 million. The remainder of the non-operational assets held (£3.5 million) include for recreational purposes (including play provision) or for the purpose of enhancing the environment.

As a Local Authority, it holds property assets in its two distinct roles:

- a) As owner in its capacity as a landlord; or
- b) As owner or lessee as a provider of local authority services.

The Council recognises that it should own property for four reasons:

- a) There is a present or short term future operational purpose;
- b) To produce a commercial investment return;
- c) For the prevention of inappropriate development; or
- d) To facilitate strategic planning and economic development aims including encouragement of employment opportunities.

No matter why the Council owns or leases property, it is under a duty to manage the portfolio to the best advantage of its communities and to achieve best value for the local tax payers.

The current portfolio can be categorized into two types:

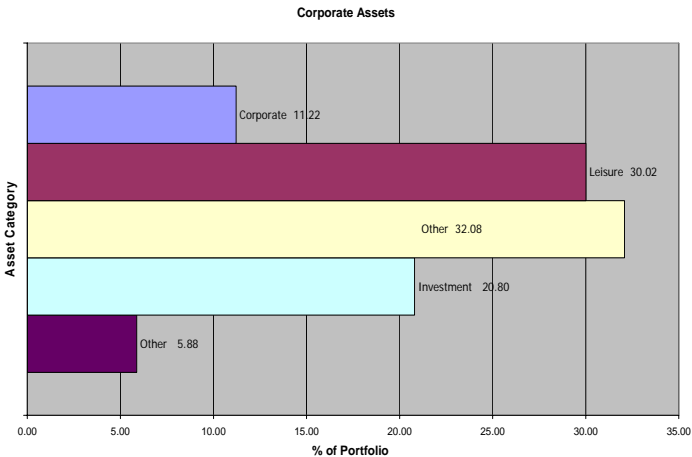
- a) **Operational properties:** either occupied directly by the Council for its administrative functions or for the delivery of services to the public, or properties owned to facilitate the provision of services or facilities to the public; and

Property Category	% of portfolio	Fixed Asset Value £1000	Assets
Corporate buildings	11.22	6.675	6
Leisure	30.02	17.862	17
Other Operational	32.08	19.090	41
Investment	20.80	12.380	65
Other	5.88	3.500	12
<b>Total</b>	<b>100.00</b>	<b>£59.507</b>	<b>141</b>

**Non-operational properties:**

land and property owned by the Council for the purposes of producing investment income, improvement of the District or the proper planning of the area. Control over the use of the land is thus retained and where possible lettings are secured on commercial terms to produce an income return.

In addition the Council owns a significant number of parcels of land which are not included in the above totals and which generally have little or no value.



1

2

### 3 The Financial Context

#### ***Overall financial position of the Council***

The Council is experiencing pressures on both the revenue budget and the capital programme. In 2008/09 the Council has only £15k of unallocated capital receipts.

#### ***The financial outlook***

There are local areas of pressure for future finances one being Project Taunton and the implications of land deals.

There are two capital reserves that represent useable cash available to support spending on the creation or enhancement of assets. They are the Unallocated Capital Resources (Non-Hsg) and Unallocated Capital Resources (Hsg).

The following table shows a forecast of the position at 31/3/09:-

#### Unallocated Capital Resources (Non-Housing)

Financial Year	Balance at start of year £'000	Income from revenue (RCCO) £'000	Prudential Borrowing £'000	Income from sale of assets (capital receipts) £'000	New Capital Spending £'000	Balance at end of year £'000
2008/09 Predicted	43	15	0	0	(43)	15

Currently, almost all capital reserves have been committed to fund future capital projects in 2008/09 onwards, leaving only £15k as yet unallocated.

#### Unallocated Capital Resources (Housing)

Financial Year	Balance at start of year £'000	Income from revenue (RCCO) £'000	Supported Borrowing £'000	Govt Grants £'000	Income from sale of assets (capital receipts) £'000	New Capital Spending £'000	Balance at end of year £'000
2008/09 Predicted	1,587	1,552	821	3,942	805	(7,922)	785

***the context for decision making relating to the property assets.***



The Council's property assets contribute to the overall financial performance in the following ways;

The programme of capital receipts provides one of the key funding sources for the capital programme.

Non operational assets provide an element of net income to support the revenue budget

By providing the opportunity to improve utilisation and efficiency in all areas of property occupation

## 4 Business Aims and Objectives

### 4 1 Introduction

In pursuit of its priority outcomes the Council is continuing an exercise where it is reviewing all the property that it owns and leases. It has to decide whether it is still relevant to own or lease those which it does; policy needs to be reviewed in order to achieve consistency of objectives over the long term; and particularly, strategic decisions will be required in order to drive asset development.

The Council's priority outcomes can be briefly summarised as follows:

- ❑ *Stimulate the creation of new jobs in the Borough and reduce deprivation in the most deprived wards in Taunton Deane* – the Council's investment portfolio is not only a means of producing valuable income, but encourages private sector investment by encouraging regeneration projects. The property reviews will release opportunities for further economic regeneration
- ❑ *Support the diversification and strengthening of the rural economy of the Borough* – by using the Council's portfolio to stimulate regeneration and diversification projects
- ❑ *Reduce the incidence of crime* - the Council uses its assets together with partners (eg. Community Groups, Somerset Police) to develop safer environments, equality of opportunity and access to neighbourhood policing
- ❑ *Enable the building of affordable housing and reduce the number of homeless households* - the Council already provide accommodation for tenants in over 6,000 council owned residential properties around the district and the management and maintenance of those properties is supported by its Housing Strategy. The Council's portfolio offers opportunities to facilitate the development of affordable housing by both the private sector and Registered Social Landlords

- ❑ *Promote healthy activities* - the Council's parks and open spaces offer the opportunity for leisure and recreation and both the non-operational and operational portfolios include sports centres and open space.
- ❑ *Increase the cleanliness of the local environment and increase the percentage of household waste recycled and actively promote sustainability* - the Council's property assets contribute through the effective management of energy use and reduction in carbon footprint where feasible, leading by example
- ❑ *Reduce the risk of flooding to Taunton town centre* – working with the Environment Agency to reduce the impact of changes in rainfall and river levels
- ❑ *Provide value for money services* – a key area in which the property portfolio makes a significant contribution through a reduction in the cost base and an improvement in investment income

It is the Council's intention to ensure that it can and will streamline the delivery of services and achieve cost savings to the benefit of its customers. The Council is moving to a position where the ownership of property can only be justified in relation to its key objectives by assessment against the following criteria:

- a) Strategic – where and how the front line services should be delivered
- b) Operational – the Council's core processes delivered in effective, efficient and sustainable properties. This will form a key part of the operational reviews to be undertaken, described in Section 4 below
- c) Investment – the setting of a target rate of return from the investment portfolio, with subsequent disposal of under-performing investments unless there are over-riding reasons for retention, or a renegotiation of lease terms

The implications of implementing the strategic review are not yet quantifiable in terms of the changes which will be required in both the operational and non-operational portfolios. As part of the exercise to determine the optimum property holding, asset reviews will be undertaken as described in Section.

## **4.2 Integration with Corporate Plan**

The AMP is written on a number of levels and as more data is collated and verified it will drill down to individual property level for implementation. The Council is committed to ensuring that the AMP integrates its property planning into the overall Corporate Strategy and facilitates the use of property to drive efficiencies into its systems and processes. The Council intends to move to a position where it will be able to:

- a) fully integrate asset management planning with business planning at corporate and service levels. The role and contribution of property will be explicit in business plans such as flexible working policies, ICT plans and customer access strategies;

- b) use its property portfolio as a driver and enabler of change in the organisation. It will understand the opportunity cost of its property and exploits this to deliver better value for money and benefits for the local community; and
- c) integrate the management of its asset base with that of other local public agencies to identify opportunities for shared use of property.

## **5 Review of Current Property Assets**

The Council is about to undertake an overall assessment and review of its property portfolio.

### **5.1 Property Review**

The properties are reviewed against criteria appropriate to their category:

- a) Operational property
  - 1. Condition, rated A (Good) to D (Bad);
  - 2. Priority of repairs and maintenance rated 1 (urgent work) to 4 (long term work);
  - 3. Fitness for purpose to incorporate an assessment of the suitability of the accommodation in relation to the particular service delivered; the sufficiency in regard to space planning and utilisation; and the sustainability in both environmental and economic terms; and
  - 4. Strategic importance, if appropriate.
- b) Non-operational property
  - 1. Strategic importance, if appropriate; and
  - 2. Any future liabilities.

The reports will focus on a number of key outputs as follows:

### **5.2 Operational Property:**

For each category assessed there will be a common rating applied from A (Good), B (Satisfactory), C (Poor) or D (Bad).

- 1. Condition – each element of the property will be assessed and rated. The rating of each element will then enable the inspecting surveyor to quantify an overall rating for the property as A, B, C or D. For each element, any works of repair or maintenance will be categorised as 1 (urgent work, prevent immediate closure), 2 (essential work <2 years), 3 (desirable work 3-5 years) or 4 (long term work +5 years).

2. Suitability – in respect of the appropriateness of use for the operational requirements, with particular regard to location, layout and accessibility both for staff and the visiting public. The building can then be rated A – D.
3. Sufficiency – an assessment of the size, layout and availability of space both internal and external to ensure that the building meets the business needs of the user department. Measurement of utilisation rates can be assessed against best practice benchmarking information which will identify potentially under or over-utilised properties. Each building can then be rated A – D.
4. Sustainability – a sustainability rating will be assessed against a number of criteria; each property will be rated A - D according to its energy efficiency which is driven in part by the building construction and condition, linking back to the condition assessment rating; transport links both for staff the visiting public and an assessment of the economic viability of the property will all count towards the final rating;
5. Development opportunities – it must always be borne in mind that all accommodation, even if it is otherwise rated A in every category, can potentially be re-provided in an alternative location to release valuable sites for disposal. Thus any opportunities to achieve revenue savings or capital receipts can be exploited in full;
6. Options for alternative or shared use – between the Council and any other public sector partner, for example, Somerset County Council, Somerset Police;
7. Disposal potential – as outlined above;
8. Private sector partnering opportunities – as the Council moves forward with the enabling agenda such opportunities should become apparent; and
9. Valuations – Existing Use, Insurance and Disposal if appropriate

### **5.3 Non-operational Property:**

1. Fitness for purpose – each building (asset) will be assessed in its existing use both internally and externally and issues such as site coverage, transport links and accessibility will feed through into the rating of A - D;
2. Financial performance and investment return – the Council will develop a framework for the review of investment properties which will include a minimum return in terms of initial yield. Any investments failing to reach the threshold will automatically be flagged for potential disposal. A further review will then be undertaken by the Asset Management Team to explore the possibilities of improving the return by way of renegotiation of leases, capital investment or other means;
3. Future liabilities – only those repair and maintenance items which are the responsibility of the Council will be rated. However properties where tenants

are not complying with their repairing covenants will be passed to the Asset Management Team for further action;

4. Development opportunities – should be flagged and investigated; and
5. Valuations – Existing Use, Insurance and Disposal if appropriate.

Full information on the following aspects can then be collated and incorporated into the database, using the ratings which flow from the reviews wherever possible:

- a) Location
- b) Function
- c) Size
- d) Utilisation rates
- e) Condition
- f) Fitness for purpose
- g) Costs in use
- h) Comparison with performance data from OGC benchmarking service

On completion of the reviews a detailed analysis and measurement of the assets against the benchmarking data will be undertaken to identify under-utilised or under-performing assets so that informed decisions can be made in respect of their future.

Where property assets fail to meet the required objectives a reasoned strategy can be put in place for improvement, re-use or disposal. It is the intention to ensure that both the operational and non-operational retained portfolios are efficient and effective.

## **6 Key Activities to March 2009**

The Council intends to complete the following during the financial year 2009/10, resources permitting:

1. Bring the condition surveys and costings of backlog maintenance up to date;
2. Develop a programme to bring the average rating of the retained properties up to B3 within 10 years;
3. Complete a programme of operational property reviews as described in Section 6 above;
4. Start a programme of non-operational property reviews to ensure that the portfolio meets the investment criteria or is being held for other strategic reason;
5. Undertake a strategic review of the whole portfolio;

6. Validate the data held on the property assets and add the strategic review results; and
7. Implement a formal set of Key Performance Indicators for benchmarking.

## **7 Conclusion**

- 7.1 It can clearly be seen that since the start of the AMP process much has been achieved. Much is also planned for the future, although with the Taunton Deane Property Services becoming part of Southwest One in December 2007, it is difficult to plan accurately.
- 7.2 However, with the broad principle of disposing/developing of assets that are poor, inefficient or do not add to the Corporate Priorities and putting money into those elements that are required either by legislation (DDA, Asbestos Legionella, Contaminated land or that contribute to greater efficiencies (ie, in space standards, use of energy) this Authority is achieving good value from its assets.

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### Background Papers:-

Asset Management Plan 2006

Asset Management Plan 2008 (full copy available in the Members Room)

# **Taunton Deane Borough Council**

**Executive - 15 October 2008**

## **Report of the Parking and Civil Contingencies Manager**

### **Revisions to the Residents' Parking Scheme (This matter is the responsibility of Executive Councillor Coles)**

#### **1.0 Introduction**

- 1.1 Following on from work instigated by the then Strategic Planning, Transportation and Economic Development Review Panel the Overview & Scrutiny Board considered at a special meeting on 10 September a report raising issues surrounding congestion within Residents' Parking Zones (RPZs) and potential for abuse and misuse of permits. The report contained a number of specific proposals put forward by the Executive Councillor and the Parking & Civil Contingencies Manager and is at Annex A.
- 1.2 The Board resolved to support a number of proposals and to recommend them to the Executive for further consideration.

#### **2.0 Executive Summary**

- 2.1 The original report contained specific recommendations for taking action on congestion and potential for abuse of permits, revisions to Carers' Permit provisions and assisting businesses based within Residents' Parking Zones.
- 2.2 The subject was considered by the Overview & Scrutiny Board as it contained proposed departures from existing policies regarding permit availability, allocation and cost base. It also proposed a policy of discounting the price of Residents' Permits for vehicles liable to Band A or B vehicle excise duty due to low CO<sub>2</sub> emissions.
- 2.3 The Executive is requested decide measures they wish to see should be taken forward as proposed amendments to the Traffic Regulation Orders.

#### **3.0 The Proposals**

- 3.1 The Board considered the proposals under 'subject headings' as below. The recommendations following each section are extracts from the draft minutes of the meeting.
- 3.2 Congestion

1	Introduce rules to make certain properties ineligible for permits, eg single dwellings converted to flats or HMOs, or brownfield redevelopments where planning policy limits the amount of off-street parking provision.	Needs to be ratified as a Council Policy so that Officers have the authority to implement it. This cannot be done as part of the Development Management process through Planning applications.  It would not reduce the current income from Residents' Permits if no other changes were made and current levels of use continued. The income stream would effectively be capped.
2	Reduce Residents' Permit allocation by 1 for each off-road parking space or garage (minimum size 5x2.5m)	Would require careful checking at application stage. Not known how many existing permit holders this would affect. Reduction in income could be mitigated by coupling with proposal 3 and classing Residents' Permit purchased as '2 <sup>nd</sup> ' permit, ie based on number of vehicles owned by the household occupants rather than permits purchased.
3	Increase the base price of a Residents' Permit to £40 and introduce a price differential for second RP.	301 (17%) households have second Residents' Permit so no significant increase in income. If 2 <sup>nd</sup> Residents' Permit fee of £50 introduced additional income would be £4,500.

Support the introduction of rules to prevent new residential development or redevelopments within existing Residents' Parking Zones being eligible for permits and to recommend that Parking Services work closely with Development Control to publicise this;

Support the principle of reducing Residents' Permit allocations where properties have off-road parking facilities but for this to be limited to driveways and hard-standings, excluding garages;

Support the introduction of a price differential for the second Residents' Permit, but not to support, at this time, an increase in the basic price of the first Residents' Permit;

### 3.3 Potential abuse issues

4	Increase Visitor Permit charge to	Serial numbers of cards would allow
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	£20 (no charge if Residents' Permit purchased). Remove second unlimited permit and Introduce scratchcard system.  100 scratchcards per household per year charged at, say, 20p each. Purchased in books of 10 for £2. Cards would show Zone, with users entering vehicle registration mark and address being visited.	follow up action if not properly used.  The charge would cover the cost of production and administration (This aspect would be advertised within the TRO process)
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Support an increase to £20 for the Visitors' Permit and to recommend the removal of the 'free' Visitors' Permit currently available if a Residents' Permit is purchased;

Support the replacement of the second Visitors' Permit with a scratchcard system with a maximum of 100 scratchcards per household, per annum;

### 3.3 Carers' Permits

5	Require annual renewal	Does not require any changes to TRO or policy. Involves additional costs for new permits each year.
6	Introduce charge or deposit for Carers' Permit	Charge should be based on similar grounds to Residents' Permits - cost recovery only. Deposit would not increase overall costs to establishment, but not cover Council's costs.
7	Time limit Carers' Permit to 2 hours in any one street	This would entail additional activity by enforcement staff. There would be cost implications to the Council if the 'clock' option was chosen.

Support the need to better control the availability and use of Carers' Permits and to recommend that a charged scratchcard system be considered with a two hour time limit in any one location;

### 3.3 Business Permits

8	Provide servicing/delivery type who are based within an RPZ and listed on the NNDR database with a	No operational problems as permits are vehicle-specific.
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	<p>maximum of two Zone and vehicle-specific Business Permits valid between 9am and 5pm.</p> <p>Vehicles must be registered to business or individual named on NNDR bill. Evidence of vehicle use for business must be provided with application.</p> <p>Charge for first permit to be 5 times Resident Permit or 25% Shopper 2 Car Park Season Ticket. Additional 50% charge for second permit.</p>	<p>There is likely to be some discussion with individual businesses as to qualification for permits.</p> <p>Need to define criteria for premises 'adjacent' to Zones.</p> <p>Financial implications not known as take up uncertain. Costs of production would be covered by permit charge.</p>
9	<p>Allow businesses where customer attends the location to buy books of 2 hour Zone-specific scratchcards for use by customers.</p> <p>These to show time date and time of parking and vehicle registration number.</p> <p>Costs to be £1 per card</p>	<p>Serial numbers of cards would allow follow up action if not properly used.</p> <p>Financial implications not known as take up uncertain. If the cost of production exceeds the suggested price (unlikely) this could be offset by the additional income generated from proposal 8.</p>
10	<p>Allow contractors working at empty property where owner does not have ability to provide Visitors' Permit to purchase 'Work Permit' on either daily or weekly basis.</p> <p>Charge to be at all-day Shopper 2 Car Park tariff.</p>	<p>There will have to be a bedding-in period for this to allow time for all contractors to become aware of the requirement.</p> <p>The actual 'Work Permit' will be a short-lived document in letter format so costs will be minimal.</p>

Support the introduction of Business Permits for businesses located within Residents' Parking Zones, inclusive of scratchcards where appropriate, as described with time limits designed not to increase congestion within the Zones for residents;

Support the introduction of Work Permits as described;

### 3.5 Houses in Multiple Occupation

11	Allow registered HMO owners to purchase scratch cards for each	If the cost of production exceeds the suggested price this could be offset by
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	Zone in which they own properties, up to a maximum of 50 in each Zone annually.	the additional income generated from proposal 4. Refunds should not be available for 'lost' scratchcards.
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Support the Visitor scratchcard being available to registered HMO owners subject to a maximum of 50 in each Zone annually;

### 3.6 Environmental issues

Introduce 100% and 50% discount on Residents' Permits costs for cars liable to VED Band A or B respectively. This discount to apply only to the first RP purchased by any individual household.	The number of vehicles falling in to the discount bands is likely to be small. The effect on income would be only marginal.
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Support the introduction of discounts of 100% and 50% on Residents' Permit charges for cars liable to Bands A and B Vehicle Excise Duty respectively;

### 3.7 Other recommendations

The Board also resolved that the Executive be recommended to:

- 1) Support the introduction of these measures from the beginning of the next financial year, subject to the formal Traffic Regulation Order process, whilst noting that the proposed changes would not be fully effective until all annual permits had come up for renewal; and
- 2) Request that the results of such changes that were effected, be closely monitored and reported back to Members after twelve months of operation.

## 4.0 Financial Implications

- 4.1 Whilst the primary purpose of the Residents' Parking Scheme is traffic management and control within the various Zones, several of the proposals have financial implications for the Council. Where possible, these implications are shown based on current usage and prices.
- 4.2 The Delegation Agreement with Somerset County Council under which this Council carries out On-Street management and enforcement specifies that if there is an overall surplus on the account that surplus must be ring-fenced and its use discussed with the County Council.

## **5.0 Corporate Priorities**

- 5.1 The Transport Corporate Aim is to minimise the growth of traffic congestion. Whilst the Residents Parking Scheme itself can not limit growth in vehicle ownership, positive management of the Scheme can help to control vehicle movements within residential areas.

## **6.0 Recommendations**

The Executive is recommended to

- Approve the change in emphasis in the Residents Parking Scheme in moving away from administrative cost recovery in recognition of the need to better manage parking congestion
- Approve the adoption of the ban on permit allocation to additional dwellings created in existing RPZs
- Approve a reduction from two to one Residents' permits for properties with a driveway or vehicle hardstanding
- Approve the introduction of a price differential for second Residents Permits and set the charge for 2009/10 for these at £50 (The price for the first Residents Permit to remain at £35)
- Approve the removal of the non-charged status of the first Visitor Permit if applied for with a Residents Permit (ie all Visitor Permits will be charged for)
- Approve the increase of £5 to £20 for Visitor Permits for 2009/10
- Approve the introduction of scratchcards to replace the present second Visitor Permit. These to be sold in books of 10 for £2 subject to a maximum of 100 cards per household per annum.
- Approve the principles of annual renewal, charging and time limits for Carers Permits
- Approve the introduction of Business Permits and scratchcards for use by businesses based within Residents' Parking Zones with operating hours and charges as outlined
- Approve the introduction of 'Work Permits' for use within Residents' Parking Zones. These to be charged for at the all-day Shopper 2 tariff.
- Approve the availability of Visitor scratchcards for purchase by HMO landlords subject to an annual maximum of 50 cards for any one Zone in which properties are owned.
- Approve the introduction of environmental discounts of 100% and 50% on Residents' Permit charges for cars liable to Bands A and B Vehicle Excise Duty respectively
- Confirm that the approved proposals be advertised as amendments to the Traffic Regulation Orders with a view to the new arrangements coming into effect from the beginning of the next financial year.

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**Overview and Scrutiny Board  
Wednesday 10 September 2008**

**Report of the Parking and Civil Contingencies Manager**

**Revisions to the Residents' Parking Scheme  
(This matter is the responsibility of Executive Councillor Coles)**

**1.0 Introduction**

- 1.1 In September last year the then Strategic Planning, Transportation and Economic Development Review Panel considered a report raising issues surrounding congestion within Residents' Parking Zones (RPZs) and potential for abuse and misuse of permits. The report is at Annex A.
- 1.2 The Panel resolved that specific proposals should be produced in conjunction with the Executive Councillor and brought back for detailed consideration. This report includes proposals under four headings; reduction of congestion, reduction in potential for abuse, Carers' Permits and help for businesses based within RPZs.
- 1.3 Annex B shows the distribution of Residents' and Visitors' Permits as at 1 July this year.

**2.0 Executive Summary**

- 2.1 This report contains specific recommendations for taking action on congestion and potential for abuse of permits, revisions to Carers' Permit provisions and assisting businesses based within Residents' Parking Zones. It also proposes a policy of discounting the price of Residents' Permits for vehicles liable to Band A or B vehicle excise duty due to low CO<sub>2</sub> emissions.
- 2.2 Some proposals are a departure from the existing policies regarding permit availability, allocation and cost base.
- 2.3 Members are requested to consider these and indicate which measures they recommend should be taken forward as proposed amendments to the Traffic Regulation Orders.

**3.0 Background to Residents Parking**

- 3.1 Residents' Parking Schemes were considered in the late 1990s as part of the Somerset County Council and Taunton Deane Borough Council Joint Transport Strategy raft of measures needed to combat the ever growing traffic congestion issues in Taunton. This was part of the exercise that led to Decriminalisation of Parking Enforcement (DPE) and the introduction of on-street charging bays in the town centre. DPE moved the enforcement of

waiting restrictions and issuing penalties from the criminal law environment to the civil one. This moved the responsibility for enforcement from Police to the Highway Authority, Somerset County Council. Since February 2001, when DPE came into being, the Borough Council has acted as agent for the County Council for on-street enforcement.

- 3.2 There was concern that residents in streets adjacent to the town centre were experiencing great difficulty in parking near their homes because of all day parking by, in the main, commuters. This also contributed to traffic congestion in those areas during the peak morning and afternoon rush hours. The town was divided into several Zones comprising a number of streets and schemes designed to introduce 'residents only' areas. These would be controlled by the issue of permits for residents' own vehicles and those of their visitors. In the most central Zone no residents parking would be available because of the traffic management controls already in place. The main decisions on the content and nature of the overall schemes were taken by the Parking Strategy Panel, which in turn reported to the Strategic Planning Committee
- 3.3 The proposals were based on Zones as there was insufficient road space to allow individual street schemes, especially in high density terraced housing streets. Public meetings were held in each of the proposed Zone areas. These resulted in some schemes going ahead immediately and others, where the residents deemed there was not a problem they wanted addressed, not. There were also serious in principle objections to having to pay to park on a public highway 'outside my own house'. The first Zones came into operation in 2001.
- 3.4 The Zones are covered by Traffic Regulation Orders. They operate generally from Mondays to Saturdays, commencing at 8.00am and finishing at 6.00pm, 8.00pm or 9.00pm depending on locality. During those hours all vehicles parked within the specially marked and signed areas are required to display a valid permit.
- 3.5 Permit allocations for each household were set at two Residents' and two Visitors'. Residents' Permits are vehicle specific, with the vehicle having to be registered to the resident at the address within the Zone. Visitors' Permits are intended for temporary display in vehicles belonging to residents' family, social and business vehicles, including delivery vehicles. They show the address being visited. Permits are valid for one year from the date of purchase.
- 3.6 Charges for permits were introduced to cover the costs of administering the scheme. These were set initially in 2000 and not increased until April this year. The current charges are
- Residents' Permits (RP) – maximum of two, cost £35 each;
  - Visitors' Permits (VP) – maximum of two, cost £15 each (one free if Residents' Permit purchased);
  - Motorcycle Permits – interchangeable with Residents' Permits, cost £17.50 each.

- Blue Badge holders have one Residents' Permit free (but not a free Visitor Permit)
- Houses in Multiple Occupation (HMOs) have the standard household allocation and cost.

## 4.0 Congestion Issues

- 4.1 Car ownership within RPZs continues to increase but the amount of roadspace available does not. Increases to the number of dwellings in each Zone with no restrictions on permit allocations bring additional pressure to the Zone and potential conflict between residents for the limited space available.
- 4.2 Stability on congestion could be achieved by curtailing the allocation within a Zone to the existing number of households. This would require the rules to be changed to remove automatic allocations for 'new' properties. 'New' properties would include conversion of single dwellings into flats or HMOs and redevelopment of brownfield sites where planning policies restrict the amount of off-street parking provision. Such a change would put 'new' properties into the same category as all residential properties within the E10 Town Centre Zone where no residents' parking is allowed. Potential developers could be made aware of such a new policy through the Development Management advice channels. This measure would act to the benefit of all existing residents.
- 4.3 There is no recognition within the present scheme of the existence of individual property off-road parking facilities. Changing the present allocation of two Residents' Permits to all households by reducing it for each available off-road parking space or garage (minimum size 5m by 2.5m) would encourage householders to make greater use of such spaces and potentially increase the road space available for others. Impact would vary between Zones according to prevalent house type. Many households with off-street provision do make use of it and do not hold Residents' Permits.
- 4.4 Similarly, the scheme does not take into account the different impact on congestion caused by single and multi-vehicle households. Many Councils have approached this aspect of congestion by charging a higher fee for a second Residents' Permit. If the suggestion regarding off-street provision is adopted then such properties should pay the second vehicle charge for a permit.

## 4.5 Proposals

1	Introduce rules to make certain properties ineligible for permits, eg single dwellings converted to flats or HMOs, or brownfield redevelopments where planning policy limits the amount of off-street parking provision.	Needs to be ratified as a Council Policy so that Officers have the authority to implement it. This cannot be done as part of the Development Management process through Planning applications.  It would not reduce the current income from Residents' Permits if no other
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		changes were made and current levels of use continued. The income stream would effectively be capped.
2	Reduce Residents' Permit allocation by 1 for each off-road parking space or garage (minimum size 5x2.5m)	Would require careful checking at application stage. Not known how many existing permit holders this would affect. Reduction in income could be mitigated by coupling with proposal 3 and classing Residents' Permit purchased as '2 <sup>nd</sup> ' permit, ie based on number of vehicles owned by the household occupants rather than permits purchased.
3	Increase the base price of a Residents' Permit to £40 and introduce a price differential for second RP.	301 (17%) households have second Residents' Permit so no significant increase in income. If 2 <sup>nd</sup> Residents' Permit fee of £50 introduced additional income would be £4,500.

## 5.0 Potential Abuse Issues

- 5.1 Residents' Permits are vehicle specific and the potential for abuse or misuse is very limited. Visitors' Permits are not vehicle specific and have no time limits. There is therefore considerable scope for them to be misused. The report at Appendix 1 (para 4.4) indicates how this can happen. The potential for abuse or misuse is probably greater in areas nearer the town centre and major employers. The scheme's generous provision of two unlimited permits is not matched by any of the other schemes examined around the country. Some schemes do not have provision for any free visitor parking at all.
- 5.2 The intention of visitor provision is to ensure that residents' legitimate social and business visitors can park within the Zone for the duration of their visit, usually a few hours at most. In this context business visitors includes delivery drivers, service engineers, and tradesmen. It would also cover clients of small businesses run from private residential addresses. It is obviously not a requirement for the visitor to be physically present at the property for the whole time. Any proposals that limit the use of visitor permits would also contribute positively to the congestion issue.
- 5.3 The simplest way of reducing the potential for abuse would be to reduce the allocation immediately to one Visitors' Permit per household. This is thought to be too drastic a measure if taken on its own and would unduly penalise those who use the scheme properly.
- 5.4 The number of Visitors' Permits in circulation might be reduced by removing the 'no cost' element of the permit provided when a Residents' Permit is purchased. Some residents who take this free permit and buy a second might not buy the second if they had to pay for the first.

- 5.5 Many Councils have opted for a scratchcard system whereby each household is able to purchase a maximum number of daily cards for use over an annual period. One card has to be used each time a visitor's vehicle is parked in the Zone. A combination of one unlimited permit and number of scratchcards would move some way towards limiting the potential for abuse whilst allowing residents to choose how they wanted to manage their visitor requirements. There will be a cost element as scratchcards are more expensive to produce than the current permits.
- 5.6 Any proposal that increases the cost to residents will not be popular, but this has to be weighed against the perception of abuse that exists.
- 5.7 Proposal

4	<p>Increase Visitor Permit charge to £20 (no charge if Residents' Permit purchased). Remove second unlimited permit and Introduce scratchcard system.</p> <p>100 scratchcards per household per year charged at, say, 20p each. Purchased in books of 10 for £2. Cards would show Zone, with users entering vehicle registration mark and address being visited.</p>	<p>Serial numbers of cards would allow follow up action if not properly used.</p> <p>The charge would cover the cost of production and administration (This aspect would be advertised within the TRO process)</p>
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## 6.0 Carers' Permits

- 6.1 These are available to all social care establishments free of charge. They can be used for unlimited times in all Zones. It is not possible to determine whether any permit is being used for its intended purpose of limited parking by peripatetic carers whilst providing actual social/medical care to residents. There is also no onus on the care establishments to manage the use of permits. Inevitably some are more rigorous than others. Carers' Permits are not provided to individual care providers not working through another establishment.
- 6.2 The management aspect would be helped by making Carers' Permits renewable annually in the same way as Residents' and Visitors' Permits. This would involve the Council in some additional expenditure.
- 6.3 A charge or deposit system would contribute to positive management and encourage establishments to limit the number of permits requested. A charge would increase annual costs to all establishments and cover the Council's costs of permit production. A redeemable deposit would limit the establishments' costs but not cover the Council's costs.

- 6.4 To limit potential misuse of permits a maximum stay of, say, two hours in any one street could be introduced. This should not affect service delivery in any major way as most peripatetic care visits are for shorter periods than this. This would be enforced by treating the vehicle as being parked in a limited waiting area, with tyre valve positions being recorded.

## 6.5 Proposals

5	Require annual renewal	Does not require any changes to TRO or policy. Involves additional costs for new permits each year.
6	Introduce charge or deposit for Carers' Permit	Charge should be based on similar grounds to Residents' Permits - cost recovery only. Deposit would not increase overall costs to establishment, but not cover Council's costs.
7	Time limit Carers' Permit to 2 hours in any one street	This would entail additional activity by enforcement staff. There would be cost implications to the Council if the 'clock' option was chosen.

## 7.0 Business Permits

- 7.1 The issue for businesses in RPZs is the ability to park legally, not congestion or perhaps cost. The difference between them and businesses located in the town centre is usually the distance to public car parks. Any proposals need to differentiate between businesses where the proprietor or employee is frequently coming and going with the same vehicle, for example service engineers or delivery based businesses, and those where the customers necessarily visit the base or location, for example retail outlets like 'corner shops' or hairdressers and small offices.
- 7.2 Business use has to be defined carefully and should not include businesses where a vehicle is used infrequently or solely as a means of travel to and from home to workplace.
- 7.3 To qualify businesses would have to be listed on the National Non-Domestic Rates register at an address within the RPZ. It would be possible to extend this to businesses on main thoroughfares adjacent to RPZs, where there is very limited on-street provision during the day.
- 7.4 In considering the needs of businesses it is important not to overlook the main purpose of RPZs and increase congestion when most residents' vehicles are likely to be parked on-street during the morning and evening peak hours. Business Permits could be restricted for use between 9am and 5pm, with a maximum number per business. To prevent potential abuse they should be vehicle specific and priced at, say, several times the cost of a Residents' Permit or a percentage of the Shopper 2 Car Park Season Ticket.

7.5 Businesses where the customer attends the location could be allowed to purchase a limited number of time-restricted scratchcards for display by customers. The time period would have to be relatively short to prevent parking beyond the time needed for the service.

7.6 In situations where, for example, builders are working on unoccupied properties for which the owner does not qualify for a Visitors' Permit daily or weekly 'work permits' could be made available charged at the all-day Shopper 2 off-street rate. These would have to be purchased in advance with applications supported by evidence of accepted quotations or written instructions.

## 7.7 Proposals

8	<p>Provide servicing/delivery type who are based within an RPZ and listed on the NNDR database with a maximum of two Zone and vehicle-specific Business Permits valid between 9am and 5pm.</p> <p>Vehicles must be registered to business or individual named on NNDR bill. Evidence of vehicle use for business must be provided with application.</p> <p>Charge for first permit to be 5 times Resident Permit or 25% Shopper 2 Car Park Season Ticket. Additional 50% charge for second permit.</p>	<p>No operational problems as permits are vehicle-specific.</p> <p>There is likely to be some discussion with individual businesses as to qualification for permits.</p> <p>Need to define criteria for premises 'adjacent' to Zones.</p> <p>Financial implications not known as take up uncertain. Costs of production would be covered by permit charge.</p>
9	<p>Allow businesses where customer attends the location to buy books of 2 hour Zone-specific scratchcards for use by customers.</p> <p>These to show time date and time of parking and vehicle registration number.</p> <p>Costs to be £1 per card</p>	<p>Serial numbers of cards would allow follow up action if not properly used.</p> <p>Financial implications not known as take up uncertain. If the cost of production exceeds the suggested price (unlikely) this could be offset by the additional income generated from proposal 8.</p>
10	<p>Allow contractors working at empty property where owner does not have ability to provide Visitors' Permit to purchase 'Work Permit' on either daily or weekly basis.</p> <p>Charge to be at all-day Shopper 2 Car Park tariff.</p>	<p>There will have to be a bedding-in period for this to allow time for all contractors to become aware of the requirement.</p> <p>The actual 'Work Permit' will be a short-lived document in letter format so costs will be minimal.</p>

## 8.0 Houses In Multiple Occupation

8.1 These have the same permit allocation as other households, irrespective of the number of separately let rooms. One HMO owner has put forward the view that they are likely to have more tenant drivers per household than other types of households and would therefore like an allocation of three Residents' Permits for each HMO. Given the rise in the average 'leaving home' age and the increase in vehicle ownership in younger age groups this premise may not be completely accurate. Allowing this would be treating one part of the private rented sector more favourably than another. It would also act against the congestion curtailment argument.

8.2 HMO owners are able to use the Visitors' Permit to park at their properties. A reduction in the number of Visitors' Permits could affect their ability to do this if the permit was already in use. This could be overcome by allowing registered HMO owners to buy scratchcards for the relevant Zones, subject to an annual maximum.

### 8.3 Proposal

11	Allow registered HMO owners to purchase scratch cards for each Zone in which they own properties, up to a maximum of 50 in each Zone annually.	If the cost of production exceeds the suggested price this could be offset by the additional income generated from proposal 4. Refunds should not be available for 'lost' scratchcards.
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## 9.0 Environmental Issues

9.1 The Government has introduced banding of Vehicle Excise Duty (VED) based on the carbon dioxide (CO<sub>2</sub>) emissions from cars in recognition that lower emissions are less damaging to the environment. Cars emitting up to 100 grams of CO<sub>2</sub> per kilometre (g/km) are charged zero (Band A) and those emitting up to 120g/km are charged at Band B rate, currently £35 per annum. Cars emitting more than 121g/km are charged at Bands C-G dependant on their actual output.

9.2 These bandings apply only to cars. They do not apply to Private/Light Goods Vehicles, where VED is charged either at Band C or G.

9.3 Introducing a parallel discount system for Residents' Permits would show the Council's wish to encourage the use of smaller cars.

### 9.4 Proposal

Introduce 100% and 50% discount on Residents' Permits costs for cars liable to VED Band A or B respectively. This	The number of vehicles falling in to the discount bands is likely to be small. The effect on income would be only marginal.
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discount to apply only to the first RP purchased by any individual household.	
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## **10.0 Financial Implications**

- 10.1 Whilst the primary purpose of the Residents' Parking Scheme is traffic management and control within the various Zones, several of the proposals have financial implications for the Council. Where possible, these implications are shown based on current usage and prices.
- 10.2 The Delegation Agreement with Somerset County Council under which this Council carries out On-Street management and enforcement specifies that if there is an overall surplus on the account that surplus must be ring-fenced and its use discussed with the County Council.

## **11.0 Corporate Priorities**

- 11.1 The Transport Corporate Aim is to minimise the growth of traffic congestion. Whilst the Residents Parking Scheme itself can not limit growth in vehicle ownership, positive management of the Scheme can help to control vehicle movements within residential areas.

## **12.0 Recommendations**

- 12.1 Members are recommended to
- Approve the change in emphasis in the Residents Parking Scheme in moving away from administrative cost recovery in recognition of the need to better manage parking congestion
  - Approve the adoption of the ban on permit allocation to additional dwellings created in existing RPZs
  - Approve the increases in permit charges as outlined
  - Approve proposals to change the way the Scheme operates as outlined in items 2 to 12 above
  - Recommend the Executive to proceed with advertising the necessary changes to the Traffic Regulation Orders with a view for the new arrangements coming into effect from the beginning of the next financial year.

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**TAUNTON DEANE BOROUGH COUNCIL**

**STRATEGIC PLANNING, TRANSPORT AND ECONOMIC DEVELOPMENT  
REVIEW PANEL – 25 SEPTEMBER 2007**

**REPORT OF THE PARKING & CIVIL CONTINGENCIES MANAGER  
(This matter is the responsibility of Executive Councillor Coles)**

**RESIDENTS' PARKING**

**1.0 PURPOSE OF REPORT**

- 1.1 To review the operation of Residents' Parking and consider options for changing some parameters to the scheme, following previous Panel discussions and recommendations within the approved Taunton Parking Strategy.

**2.0 EXECUTIVE SUMMARY**

- 2.1 This report identifies issues affecting the effectiveness of Residents' Parking. It addresses the issues of costs and allocations and presents avenues for discussion and decision. It recommends that action be taken to maximise the road space available to residents, and also to limit the potential for abuse by reducing the total number of permits available.

**3.0 BACKGROUND**

- 3.1 The Taunton Parking Strategy recommended that the type and number of permits available under the scheme be revisited. A Member Task & Finish Group also concluded that the number of permits available, because of the number of eligible households, meant that there was considerable congestion in some Zones. Residents have also echoed these concerns, with particular reference to brownfield redevelopment and conversion of single dwellings into flats – both of which take place without increasing the road space available for parking. The Executive, at its 19 July meeting last year, requested that any proposals to change the way Residents' Parking operates should be the subject of full consultation.
- 3.2 Residents' Parking was introduced in 2001 to enable Taunton residents in areas with little or no off-street parking provision to park during the day within reasonable proximity of their homes. The town is divided into a number of Zones for enforcement and administration purposes. There is no Residents Parking provision within the most central Zone.
- 3.3 The system provides for two Residents' Permits and two Visitors' Permits to be available to each residential property within a Zone. The costs are annually £30 for each Resident's Permit and £10 for each Visitor's Permit. One Visitor Permit is supplied free of charge if a Residents' Permit is purchased. A Motorcycle Permit is available at £15 in lieu of a Residents' Permit. Rules

regarding eligibility, documentation, cost and use are laid down in the relevant Traffic Regulation Orders (TRO). Carers Permits are available free of charge to those involved with care in the community. Business premises sit outside of the scheme and have no permit entitlement. The rules are the same in each RPZ, although the hours of operation vary. Appendix 1 gives details of each Zone. Plans will be available at the meeting for ease of reference.

- 3.4 Residents' Permits are vehicle specific and state the registration number of the vehicle to which they relate. Visitors' Permits state the address of the property which the driver of the vehicle is visiting. Carers Permits are transferable between carers of the organisations to which they are issued.
- 3.5 The numbers of valid permits within each Zone as at 1 August each year are at Appendix 2.

#### **4.0 OPERATIONAL ISSUES**

- 4.1 The Residents' Parking Scheme is administratively easy to operate. The £30 permit charge was fixed to cover the costs of permit production and issue. No costs of enforcement were included as in 2001 the areas involved were already in part subject to Waiting Restrictions in some form or other and would have required patrolling in any case. The £30 charge has not been increased since its introduction. This Panel recommended last July that the Executive Councillor consider an increase to £35.
- 4.2 There have been a number of changes to the Zones which have resulted in enforcement patrols being introduced into areas not previously subject to widespread Waiting Restrictions. There is currently a consultation exercise under way over the introduction of Residents' Parking in the William Street/Herbert Street area where no restrictions exist at present. Such changes increase the workload, but patrol staffing levels have not been changed since 2001.
- 4.3 The Residents' Permits work well and there is no room for misuse or abuse as they are vehicle specific and renewed annually. However, there is potential for abuse of the Visitors' Permit as it can be displayed on any vehicle for any length of time. The intention behind this component of the scheme was to enable residents' occasional social and business visitors to be able to park within the Zone without contravening the regulations.
- 4.4 Both the Residents' and Visitors' Permits of the type in use are to a limited extent self-policing, and this was one of the factors leading Members deciding on them initially. Residents do take notice of what is happening in their streets. Over the years Parking Services have received complaints from residents of alleged misuse by neighbours. We have responded with letters to permit holders reminding them of the conditions of use. This has resolved a number of issues. There is also a body of anecdotal evidence that leads us to believe there is wider abuse happening, but which is difficult to substantiate. There have been allegations that Visitors' Permits are
  - lent to family members and friends to enable "commuter" parking;



- “rented out” for considerable sums of money;
  - used by residents to avoid paying for a Residents’ Permit or to exceed the two vehicle limit;
  - used by businesses (residential properties over shops) to allow commercial or customer parking; and
  - held by residents but used by businesses.
- 4.5 Such allegations and anecdotes can lead to the scheme being viewed with some disrepute and dissatisfaction. Some situations lead to conflict with enforcement staff as genuine visitors are not able to access permits but still wish to park. We do carry out random checks and in the third scenario above do take action. The TROs do give us the power to cancel permits. To date we have not done so.
- 4.6 Vehicle ownership is growing. The more vehicles there are owned by residents the less road space there is available for visitors. There is therefore a greater pressure on the permit scheme to be more rigorous in its attempts to ‘share out’ the road space.
- 4.7 The policy of brownfield redevelopment, with extremely limited off-street parking provision, in the more central areas of the town is generally putting the whole resident parking provision under increased strain. Conversion of single properties into flats also immediately increases the number of eligible households with Zones. The Highway Authority’s ability to object to such proposals is limited by PPG statements. This is leading to dissatisfaction from residents, especially those who have held permits for some time, and is a cause of friction between them and Parking Services staff both in the office and on the ground.
- 4.8 Houses in Multiple Occupation (HMOs) are treated as one household and are therefore entitled to two resident and two visitor permits. This leads to conflict between tenants and Parking Services as permits are allocated on a first-come first-served basis irrespective of the number of tenants. There have been requests for the entitlement for residents’ permits to be increased in respect of HMOs, in recognition of the service such properties provide. To do so in isolation would inevitably increase the pressure on Zones with a high concentration of such properties.
- 4.9 There are increasing pressures to extend operating hours later into the evenings in several Zones as a result of conflict between residents and customers of the “evening economy”. Such extensions result in increased expectations of attendance and action by enforcement staff.
- 4.10 Carers’ Permits are intended for use only when Carers are actually undertaking formal caring duties. We have problems with them being used by staff attending meetings or training courses in restricted areas. Also not all care organisations are efficient at recovering permits from staff that leave their employment.
- 4.11 Businesses located within RPZs have no permit entitlement and therefore are

prevented from having vehicles on-street near their premises. This has been a source of friction with the enforcement staff.

## **5.0 WHAT HAPPENS ELSEWHERE?**

- 5.1 Residents' Parking schemes operate in many areas of the country. They vary in terms of permit allocations and charges depending on particular circumstances and traffic management requirements. Some have higher charges in more central or sensitive zones and some have differential charges for second or subsequent permits.
- 5.2 Although this Council's operation of the scheme for residents is generally in line with most other schemes we have not found anywhere provision for visitors to be as generous in allocation or application. Some schemes provide one 'unlimited use' visitor permit only, whilst some do not provide any. Many involve the use of daily scratchcards, either in place of a permit or in addition to it. Appendix 3 lists examples of schemes operating in other areas.

## **6.0 ISSUES FOR CONSIDERATION**

- 6.1 The Residents' Parking Scheme is intended to benefit residents who have little or no off-street parking. It is aimed at maximising the use of the available highway by the whole Zone. The Scheme necessarily must include limitations on the numbers and types of permits available and will therefore inevitably not meet the needs of every individual household.
- 6.2 There is extremely little ability to provide more designated road space within the existing Zones. There is always a balance to be drawn between the needs of residents and businesses, without losing sight of the primary purpose of the highway to enable safe free passage of traffic.
- 6.3 The availability of parking is becoming an increasingly important part of decision making on house purchase. Potential residents should be able to assess the likelihood of actually being able to park rather than just knowing the property is within a Zone.
- 6.4 The present scheme takes no account of any off-street parking facility, garage or drive, available at any individual property. In the interests of each Zone as an entity should permit allocations reflect the existence of such facilities?
- 6.5 Every household has an entitlement under the scheme to purchase permits irrespective of the amount of road space available within any Zone. This can give the impression the Council is interested more in making money than managing the parking situation. Should there be a limit to the number of permits available within each Zone, with length of residence used to establish a waiting list?
- 6.6 What is the relative worth of Residents' and Visitors' Permits? Should residents be able to exercise choice over the balance of any permit allocation? Should they be able to change this balance during the life of the permits?

- 6.7 What level of charge should residents bear because of where they live? Should second permits carry a premium to reflect the congestion level attached to them?
- 6.8 Residents' and Visitors' Permits are valid for 12 months from the date purchased rather than any 'block' date. The timing of any changes will need to reflect this.
- 6.9 How can care organisations be encouraged to be more responsible in overseeing the use of their permits? Should there be a charge on each organisation or each permit? What provision can be made for emergency care responders?
- 6.10 How can the scheme be adapted to help businesses within the Zones?
- 6.11 The Scheme needs to be simple to understand and operate for all parties. It also must be reputable and have very limited potential for abuse.
- 6.11 As the allocation, eligibility rules and charges are laid down in the TRO, all suggested changes will be subject to a formal public consultation process.

## **7.0 FINANCIAL IMPLICATIONS**

- 7.1 The purpose of Residents Parking is primarily traffic management. Several of the issues raised above do not in themselves have financial implications in relation to direct costs to the Council. Any changes to allocations that reduce the overall number of permits available will put a ceiling on income. The scheme is intended to be self-financing so permit charges must reflect that.
- 7.2 Increases to the size or operating hours of Zones will bring extra enforcement requirements. This will inevitably mean either an increase in enforcement resources or a reduction in the level of enforcement provided across the whole traffic management front.

## **8.0 CORPORATE PRIORITIES**

- 8.1 The Transport Corporate Aim is to minimise the growth of traffic congestion. The positive management of the Residents' Parking Schemes is one of the tools available to achieve this.

## **9.0 RECOMMENDATIONS**

- 9.1 In relation to Residents' Permits, Members are recommended to consider the options available to maximise parking opportunities for residents through permit allocation, eligibility criteria and charges.
- 9.2 In relation to Visitors' Permits, Members are recommended to support measures to reduce actual and potential abuse of the system by reducing the

number of permits available to each household.

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## RESIDENT PARKING ZONES

### **N02 Railway Street** - Designated Bays – 253 metres

Railway Street, Thomas Street, Grove Terrace, Kingston Road (part)

### **W03 Albemarle** - Designated Bays – 552 metres

Whitehall, Albemarle Road, Beaufort Road, Belvedere Road, Station Road (part)

### **W04 The Avenue** - Designated Bays – 1420 metres

The Avenue, Birch Grove, Elm Grove, Linden Grove, French Weir Avenue, Woodstock Road, Staplegrove Road (part), Elm Close

### **W05 Greenbrook** - Designated Bays – 1161 metres

Wood Street, Greenbrook Terrace, Portland Street, Cleveland Street, Clarence Street, French Weir Close, Northfield Road

### **W08 Manor** - Designated Bays – 556 metres

Permits required only in Manor Drive, Manor Close, Bruford Close

### **E09 Wilton** - Designated Bays – 642 metres

Wilton Street, Westgate Street, Mount Nebo, Vivary Road, Burton Place, Shuttern, Upper High Street, Middleway, Cann Street, Broadlands Way, Broadlands Rise

### **E11 St Augustine** - Designated Bays – 2483 metres

St Augustine Street, Laburnum Street, Stephen Street, Stephen Way, Eastbourne Road, Eastbourne Terrace, Gyffarde Street, Winchester Street, Priory Avenue (part), Duke Street (part), East Reach (part), Canon Street (part), Gloucester Street, Haydon Road, Wilfred Street, Cranmer Road

### **E12 Trinity** - Designated Bays – 3353 metres

Trinity Street, Trinity Road, South Street (part), Viney Street, Noble Street, Queen Street, Grays Road, Church Street, Princes Street, Blake Street, Gordon Road, Victoria Street, East Reach (part), Eastleigh Road, Northleigh Road, Southleigh Road, Westleigh Road, Holway Road, Holway Avenue, Savery Row, Midford Road, Wordsworth Drive (part)

### **E14 Victoria Gate** – Designated Bays – 399 metres

Victoria Gate, Mitre Court, Alfred Street, East Reach (part)

## APPENDIX 2

### ANNUAL PERMIT HISTORY AS AT 1 AUGUST 2007

**R – Residents’ Permits, V – Visitors’ Permits**

Zone	2002		2003		2004		2005		2006		2007	
	R	V	R	V	R	V	R	V	R	V	R	V
N01 Railway Street	38	49	42	48	40	52	43	51	57	98	59	100
W03 Albemarle	36	68	146	227	146	236	152	245	161	252	159	244
W04 The Avenue	107	141	116	146	125	171	134	176	150	190	145	190
W05 Greenbrook	44	56	184	266	180	273	191	288	195	303	193	285
W08 Manor	2	4	10	20	7	19	9	20	8	21	8	20
E09 Wilton	22	46	133	214	135	223	133	228	123	220	129	228
E11 St Augustine	59	99	292	410	460	641	444	657	466	703	481	728
E12 Trinity	152	223	226	293	209	292	206	306	203	314	432	680
E14 Victoria Gate					41	88	48	94	50	111	47	113
Total	460	686	1149	1624	1343	1995	1360	2065	1413	2212	1653	2588

### DISTRIBUTION OF PERMITS PER HOUSEHOLDS AS AT 1 AUGUST 2007

**R – Residents’ Permits, V – Visitors’ Permits**

Zone	No of Households							
	0R/1V	0R/2V	1R/0V	1R/1V	1R/2V	2R/0V	2R/1V	2R/2V
N01 Railway Street	3	2	0	22	11	0	2	1
W03 Albemarle	25	12	0	67	46	0	9	12
W04 The Avenue	10	11	0	36	27	0	17	24
W05 Greenbrook	30	16	2	77	44	0	15	20
W08 Manor	8	2	1	6	1	0	0	0
E09 Wilton	23	26	2	61	28	0	7	12
E11 St Augustine	45	48	1	171	137	0	36	51
E12 Trinity	56	62	6	159	103	0	30	55
E14 Victoria Gate	22	18	1	22	10	0	1	6
Total	222	197	13	621	407	0	117	181

**SCHEMES OPERATING IN OTHER AREAS****CHELMSFORD**

Residents Permits	one per vehicle belonging to a resident; same cost per permit
Visitor Permit	one per property, valid on any vehicle up to four hours NB Resident and Visitor Permits cannot be issued to the same address
Visitors Tickets	sold in books of ten valid for one, four or six hours cost £3, £9 and £12 respectively; only one ticket can be displayed at a time

**SALISBURY**

Residents Permits	two per residence reduced by one per off-road parking space available within the residence (defined as driveway or garage measuring 5x2.5m minimum)
Visitor Permit	one available only to residents who are over 60 or housebound, do not own a car and live in a household to which no resident permit has been issued
Visitors Tickets	100 daily scratchcards per household annually at 20p each additional cards available at cost equivalent to all day parking in city centre

**AYLESBURY VALE**

Residents Permits	one per vehicle owned by a resident
Visitor Permits	none
Visitor Tickets	max 50 per address within three month period; cost 50p each

**ASHFORD**

Resident Permits	maximum two per household reduced in consideration of any off-street provision
Visitor Permit	none
Visitor Tickets	£1 each with no limits

**THREE RIVERS**

Residents Permits	maximum two, second permit costs double first
Visitor Permit	central areas no entitlement, outer areas one per household
Visitor Tickets	sold in book of 10 for £10

**WINCHESTER**

Inner Area	one Resident Permit, one Visitor permit and 20 scratchcards pa first permit £22, second (of any type) £50, scratchcards £1
Outer Area	two Residents Permits, two Visitor Permits and 20 scratchcards pa first permit £22, subsequent permits (of any type) £50, scratchcards £1 (scratchcards available only if a permit has been purchased) restrictions on converted properties – eligibility limited to pre-planning permission status

**SOUTH SOMERSET (YEOVIL)**

Residents Permits	one per car driving resident
Visitor Permits	one per household

**POOLE**

Residents Permits	one per vehicle registered at property
Visitor Permits	none
Visitor Tickets	£1 each with maximum 20 per household per year

**BOURNEMOUTH**

Resident Permits	two per household
Visitor Permits	one per household



**ANNEX B****ANNUAL PERMIT HISTORY AS AT 1 JULY 2008****R – Residents’ Permits, V – Visitors’ Permits**

Zone	2002		2003		2004		2005		2006		2007		2008	
	R	V	R	V	R	V	R	V	R	V	R	V	R	V
N02 Railway Street	38	49	42	48	40	52	43	51	57	98	59	100	39	50
W03 Albemarle	36	68	146	227	146	236	152	245	161	252	159	244	150	239
W04 The Avenue	107	141	116	146	125	171	134	176	150	190	145	190	153	203
W05 Greenbrook	44	56	184	266	180	273	191	288	195	303	193	285	193	300
W08 Manor	2	4	10	20	7	19	9	20	8	21	8	20	9	18
E09 Wilton	22	46	133	214	135	223	133	228	123	220	129	228	146	247
E11 St Augustine	59	99	292	410	460	641	444	657	466	703	481	728	479	746
E12 Trinity	152	223	226	293	209	292	206	306	203	314	432	680	476	778
E14 Victoria Gate					41	88	48	94	50	111	47	113	50	121
Total	460	686	1149	1624	1343	1995	1360	2065	1413	2212	1653	2588	1695	2702

**DISTRIBUTION OF PERMITS PER HOUSEHOLDS AS AT 1 JULY 2008****R – Residents’ Permits, V – Visitors’ Permits**

Zone	No of Households							
	0R/1V	0R/2V	1R/0V	1R/1V	1R/2V	2R/0V	2R/1V	2R/2V
N02 Railway Street	3	1	0	18	9	0	5	2
W03 Albemarle	22	14	4	53	46	0	8	15
W04 The Avenue	8	13	1	34	32	0	15	27
W05 Greenbrook	26	18	1	70	60	0	14	17
W08 Manor	8	0	1	6	2	0	0	0
E09 Wilton	28	26	2	62	25	0	8	21
E11 St Augustine	48	51	1	172	140	0	30	52
E12 Trinity	68	67	5	184	129	0	31	50
E14 Victoria Gate	23	18	1	25	11	0	0	6
Total	234	208	16	624	454	0	111	190

# **Taunton Deane Borough Council**

**Executive – 15 October 2008**

## **Report of the Forward Plan Manager**

**This matter is the responsibility of the Executive Councillor for Planning and Transport, Councillor Coles**

## **Draft Revised Regional Spatial Strategy for the South West incorporating the Secretary of State's Proposed Changes**

### **1.0 Executive Summary**

1.1 The Borough Council objects to the following parts of the Proposed Changes:

- The deletion of so much of the previous content that reflected the local distinctiveness of the region in chapters 2, 3 and 4
- The deletion of all the sub-regional infrastructure proposals
- The undeliverable annual average dwelling requirements proposed for Taunton and lack of phasing to give a lower rate for the first decade of the plan period
- In the context of the limit to the capacity of Taunton to accommodate additional growth, the inflexibility of the RSS to allow Wellington to have a greater role in accommodating growth
- The potential harm to the self-containment of Taunton from a housing requirement that exceeds the potential for employment growth
- The deletion of the proposals for a Second Strategic Route
- The inaccuracies in relation to the Taunton HMA text, policy and key diagram

### **2.0 Purpose of Report**

2.1 To respond on behalf of the Borough Council to the consultation on the Draft Regional Spatial Strategy Proposed Changes. The deadline for response is 24 October, 2008.

### **3.0 Background**

3.1 Following the Examination in Public into the draft Regional Spatial Strategy (RSS) in 2007, the Panel Report was published in January 2008. In July the Secretary of State published the draft RSS Proposed Changes for consultation.

3.2 In March 2008 the Somerset Strategic Planning Conference (SSPC) wrote to the Secretary of State expressing strategic concerns about the Panel report (see Appendix A).

- 3.3 Borough and County councillors were briefed on 21 August about the RSS Proposed Changes and the implications for Taunton Deane's Core Strategy. It has also been considered at the LDF Steering Group. In September the SSPC agreed a consultation response that repeats and elaborates the strategic concerns raised previously.

#### 4.0 **Response**

- 4.1 It is disappointing that the Sec of State does not appear to have listened to and understood the concerns that we expressed to her following the publication of the Panel Report, namely:

- Deliverability and phasing of the growth – Baker's SAS report provides evidence from house builders that Panel level of growth undeliverable at Taunton – the draft RSS proposed a lower annual housing rate for the first decade than for the second, but the Panel and the Proposed Changes require a rate of 900 dpa for the whole plan period – this is undeliverable and will increase the risk of panning by appeal on unplanned less sustainable sites.
- Sustainability of increasing Taunton's growth – increasing housing growth to a level that is unlikely to be matched by the growth in employment is likely to lead to out-commuting and a reduction in our currently high level of self containment – coupled with inflexibility to distribute what is undeliverable at Taunton to sustainable market towns such as Wellington (policy B settlements).
- Infrastructure provision to provide for growth had been agreed by the Panel and their Report refers to "the 50% housing growth in the HMA proposed for Taunton in draft RSS would be the highest proportion shouldered by any SSCT" (Panel Report 4.6.16) – the Proposed Changes have deleted all the sub-regional infrastructure proposals.
- Downgrading of Second Strategic Route in the Panel Report - now cut completely in the proposed Changes – the A358 link between the M5 and the A303 was agreed by Alistair Darling as vitally important for both east/west and north/south intra-regional routes.

- 4.2 It is also disappointing to see so much that reflects the distinctiveness of the south west deleted from the RSS. Inspectors have found LDFs unsound if they fail to reflect local distinctiveness. This criticism could now be levelled at the RSS Proposed Changes. The deletion of chapter 2 and cuts to chapter 3 (including the deletion of strategy emphases map 3.1) and chapter 4, raise the question as to whether we still have an effective spatial strategy. There is also concern that there is not a clear evidence base for much of the new content in the Proposed Changes. The replacement of high standards for sustainable construction in policy G and renewable energy in policy RE5 with a reiteration of lower national standards is regrettable in view of all the work the region did on this (to which the Borough Council contributed) and will fetter our ability to reduce carbon emissions in major new developments.

- 4.3 The Panel had accepted 2.8% pa average gross value added (gva) for the region, whereas the Proposed Changes suggest 3.2% gva growth over the 20 year period. This is not considered to be a realistic planning assumption on which to base regional housing provision. The concern is that housing delivery could significantly exceed the growth in jobs. This would adversely affect the self containment and therefore the sustainability of settlements. This represents a predict and provide approach rather than the plan, monitor and manage approach espoused by government.

### **Taunton HMA**

- 4.4 Proposed Changes p.91 para.4.1.48 just refers to two mixed-use urban extensions for Taunton, which is misleading. It should refer to two strategic urban extensions to the NE and SW of Taunton and a number of smaller urban extensions of up to 1,500 homes mainly around the northern edge of the town. Again it is disappointing in the context of all the work on the Taunton Urban Extension Study and the Taunton Sub Area Study that the supporting text has been cut to the point where it no longer gives any sense of local identity. Working in partnership so much work went into the RSS and it really seems to have been wasted if the final RSS is to be so succinct that it fails to reflect the strategy that was agreed by all our local partners and stakeholders.
- 4.5 Proposed Changes Policy HMA6 Taunton SSCT, the first bullet point incorrect. An objection was made to draft RSS that '/ adjoining' should be inserted between 'Within' and 'Taunton's urban area'. The Panel Report corrected this error by making it clear that the 11,000 figure comprises 5,000 dwellings from the urban capacity study, 1,000 from the Local Plan at Monkton Heathfield and 4,500 dwellings in non-strategic urban extensions, mainly around the northern edge of the urban area. The wording should be amended to read 'Within/adjoining Taunton's urban area...'.
- 4.6 Proposed Changes Table 4.2 indicates for Taunton an annual average rate of 900 dwellings over the whole of the period 2006 – 2026. The dRSS phased the rate of housing development with a lower annual rate of 660 for the first decade and 740 for the second decade. The average annual rate of 900dpa for the whole of the plan period is undeliverable, bearing in mind that the figure for the decade 1996 - 2006 was 301 dpa. Following a workshop with house builders, the Taunton Sub Area Study (chapter 11) concluded that the maximum realistic delivery rate for Taunton is 780dpa.
- 4.7 In 2006/7 and 2007/8 Taunton delivered 251 and 402 dwellings respectively. RSS housing rates for Taunton must be phased in order to reflect both our existing base rate and the fact the RSS target represents a challenging 45% increase in Taunton's dwelling stock over the 20 year plan period. Also it usually takes about seven to eight

years between the allocation of a site in a plan and the completion of houses on the ground. There are several effects of unrealistic annual housing rates:

- failure to meet the RSS housing target in the early years pushes up the residual rate even higher for the remaining plan period;
- when the RSS replaces RPG10 we will no longer have a five year supply of housing land, which will increase the risk of planning by appeal on unplanned, less sustainable development sites, and
- less favourable outcomes for Housing and Planning Delivery Grant would adversely affect planning staff resources

It will therefore be essential that the RSS re-introduces phasing into the annual average net dwelling requirements, with a lower annual rate for the first decade of the plan period.

- 4.8 Following the 'Taunton Sub Area Study', Baker Associates were commissioned by Somerset to report on the 'Implications of ONS Household Projections for Somerset'. The study concluded that SSCTs have the greatest opportunities for employment and the greatest levels of accessibility to services but they also have limitations on their capacity to accommodate additional growth. Given the constraints on SSCTs and the scale of the step change in growth for Taunton in particular, Market Towns such as Wellington (category B settlements in the RSS) should have a greater role to play in accommodating the additional growth arising as a result of the revised ONS household projections. The concern is that the Proposed Changes will not allow a greater role for Wellington to accommodate growth that cannot be met in Taunton.
- 4.9 The problem is that whilst the Proposed Changes have increased the Taunton growth from 14,000 to 18,000 dwellings, the figure for the remainder of Taunton Deane (including Wellington) has only changed from 3,300 to 3,800 dwellings. This gives little or no flexibility in the LDF Core Strategy to enable Wellington to play a greater role in accommodating growth as recommended in the Baker's study.
- 4.10 Many other SSCT key diagrams have shown spot symbols for areas of search for as little as 1,000 homes (e.g Cheltenham and Gloucester). Given the scale of the non-strategic urban extensions, mainly north of Taunton, with a total of around 4,000 homes, it seems anomalous that the Taunton key diagram does not indicate any areas of search to the north of the town. The Taunton HMA diagram also shows spot symbols for Comeytrowe extending half way to Wellington, which is misleading and does not reflect the urban extension studies that informed the draft RSS. The diagram is also wrong in relation to the box suggesting that 11,000 dwellings will be within the existing urban area (see para. 4.4 above).

## 5.0 Conclusions

5.1 The Borough Council objects to the following parts of the Proposed Changes:

- The deletion of so much of the previous content that reflected the local distinctiveness of the region in chapters 2, 3 and 4
- The deletion of all the sub-regional infrastructure proposals
- The undeliverable annual average dwelling requirements proposed for Taunton and lack of phasing to give a lower rate for the first decade of the plan period
- In the context of the limit to the capacity of Taunton to accommodate additional growth, the inflexibility of the RSS to allow Wellington to have a greater role in accommodating growth
- The potential harm to the self-containment of Taunton from a housing requirement that exceeds the potential for employment growth
- The deletion of the proposals for a Second Strategic Route
- The inaccuracies in relation to the Taunton HMA text, policy and key diagram

## 6.0 Corporate Priorities

6.1 The Regional Spatial Strategy influences the scale of development, economic investment and transport infrastructure for each of the planning authorities in the south west, providing a basis for each council in the preparation of their Local Development Framework. It impacts on Project Taunton and every corporate priority.

## 7.0 Recommendation

7.1 It is recommended that this response be agreed and submitted to GOSW on behalf the Borough Council.

### Contact Officer:

Ralph Willoughby-Foster: tel. 01823 356480 e-mail [r.willoughby-foster@tauntondeane.gov.uk](mailto:r.willoughby-foster@tauntondeane.gov.uk)





**Executive : 15 October 2008**

## **Task and Finish Review into the Co-ordination of Services for Older People**

### **Report of Scrutiny Officer**

(This matter is the responsibility of Councillor Alan Wedderkopp)

#### **Executive Summary**

This task and finish review has now been concluded. The final report has been submitted to the Overview and Scrutiny Board and was approved subject to some amendments, which have been made.

This cover sheet provides directions on how the Executive should deal with the task and finish report into affordable housing, particularly its 7 recommendations.

The final report of the task and finish review begins on the next page.

#### **1. The Executive is asked to do the following:**

- 1.1 Consider the report and its recommendations, and decide which, if any, of the recommendations it wishes to adopt.
- 1.2 If the Executive agrees to adopt any of the recommendations of the review, it should state who will be responsible for delivering each of the adopted recommendations. The Corporate Management Team (CMT) has had prior sight of the report and has identified a CMT member to take responsibility for each recommendation, if adopted.
- 1.3 If the Executive decides **not** to adopt any of the recommendations, it must specifically state why, as prescribed by the Local Government Act 2007.

#### **2. Contact Details**

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## Overview and Scrutiny

# Task and Finish Review

## A Review into Co-ordination of Services for Older People in Taunton Deane

October 2008



**“Age is an issue of mind over matter. If you don't mind, it  
doesn't matter”**

**- Mark Twain**

# Taunton Deane Borough Council: Overview & Scrutiny

## A Task and Finish Review into Co-ordination of Services for Older People in Taunton Deane

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Introduction by Councillor Danny Wedderkopp  
Chair of the Review



“I am in my 40's. In 20 years I will be in my 60's:

But will I be old?

That really depends on my health and quality of life and a lot more besides. What is certain is that we are all getting older.

Getting older is everybody's business.

You do not have to be old to be frail, and you are not automatically frail because you are old. But it is possible to be excluded because you can't access the services you require.

This review attempts to challenge the way that services for older people are co-ordinated. The aging population means that if we don't prepare our voluntary, community and statutory services for the diverse needs of older people, we won't be able to help people live their lives as best they can, as they get older.

Finally, I'd like to thank everyone who gave their time to help us carry out this review.”

**Councillor Danny Wedderkopp**

Chair

Co-ordination of Services for Older People Task and Finish Review

## **Acknowledgements**

**Colin Croad**

Chairman, Taunton Deane Association for Neighbourhood Care

**Alistair Croucher**

Private Sector Housing Manager, Taunton Deane Borough Council

**Libby Lisgo**

Chief Executive, Age Concern Somerset

**Jan Newton**

Assistant Area Manager for Adult Social Care, Somerset County Council

**June Norman**

Funding Information Contact, Taunton Deane Council for Voluntary Service

**Jon Sykes**

Manager, Older People's Services in Taunton, NHS

**David Whitehead**

Housing Strategic Services Manager, Taunton Deane Borough Council

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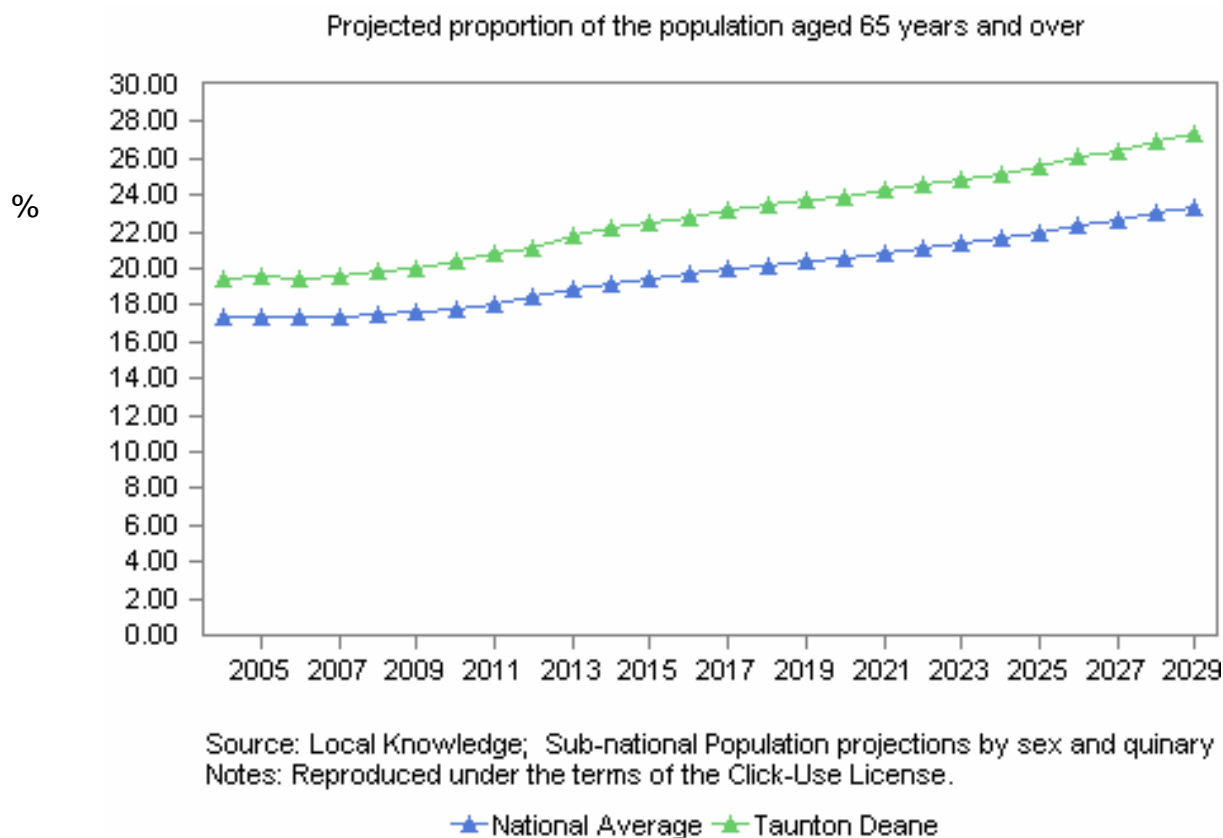
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## Background to the Review

Over the next decade an increasing proportion of Taunton Deane residents will be retired or elderly. There will be increased need for services for those people. Currently there are many community, voluntary and statutory services available, however there appears to be little co-ordination between them and some people may 'fall through the net.' The graph below shows how Taunton Deane's older population is expected to grow over the next 20 years.

### Projected population over 65 years of age between 2004 and 2029



Councillors felt that proper co-ordination between local authorities and voluntary / community services would save time and money, as well as provide services to those who need them – particularly people who might not know that a service is there, or are reluctant to take advantage of it.

## **Why do a Review on this Subject?**

Members wanted to examine the current situation with regard to co-ordination of services for older people.

This review was begun in response to three drivers:

1. Demographic changes over the next decade will see an increasing proportion of Taunton Deane residents being retired or elderly. Consequently there will be an increased need for certain services for older people.
2. There are many voluntary and community sector (VCS) services available to older people, not including the statutory services provided by local authorities.
3. There is a view that if coordination and interagency co-operation is done well, the needs of the aging population can be met, target groups will know what services exist and can access them easily, and time and money will not be wasted on duplication of effort.

Demand for these services will increase as the older population increases. With the large number of different organisations providing services, coordination will become increasingly important, as will good publicity of which services are available.

This review will not investigate the quality of services. It will look for ways to improve coordination of services for older people so that take-up is maximized without duplicating services or overlooking gaps in provision.

## **Membership of the Review**

Councillor Danny Wedderkopp (Chair)  
Councillor Gloria Copley  
Councillor Terry Hall  
Councillor Sue Lees  
Councillor Joanna Lewin-Harris  
Councillor Elaine Waymouth

## **Terms of Reference**

The review group agreed to broadly define older people for the purposes of this review, as anyone over the age of 65, or over 55 if economically inactive. However, the review group was conscious that this definition may change as evidence was gathered, so chose to use it merely as a starting point.

The review group also defined “co-ordination” as;

- Being best able to reach the target group whoever they are; and
- Effectively creating links between the target group and the organization providing the service.



The review group chose to focus purely on services for older people provided by the voluntary sector or Taunton Deane, but would speak to the wider statutory sector i.e. the County council.

The review group agreed that the reviews objectives should be ;

- To identify the current services for older people
- To understand the challenges that lay ahead for the providers of services for older people in Taunton Deane
- To investigate whether there was a problem with the co-ordination of services for older people and if so to recommend how those services could avoid duplication or gaps in provision.

## **Evidence Taken, Key Findings and Recommendations**

### **Survey of Voluntary Groups**

The review group carried out a survey of community and voluntary organisations that provide a service to older people. The survey was designed to find out what level of co-ordination and co-operation existed between community and voluntary groups, their level of involvement with older people, and what their future plans are.

The survey was a postal questionnaire sent to 18 local community and voluntary organizations in the Taunton Deane area. A list of those organizations, a copy of the survey and cover letter, and full list of responses, are included in appendices A to D at the end of this report.

### **Results**

- Of the 18 surveys sent out, only 5 were returned. 5 more were returned as “not known at this address.” There were 8 non-responses.
- Types of services provided include emotional support, regular clubs, debt and consumer advice, respite work and day centres.
- Respondents tend to focus on older people in general, although the Clovermarle Stroke Club understandably focuses purely on support for victims of stroke.
- Client bases are small, limited by the capacity of volunteers and available space. However the Citizens Advice Bureau helps around 600 clients over the age of 65 each year.
- Funding is found from a combination of charitable donations and grant funding from local authorities and other government agencies. Funding remains a major challenge for most of the organizations who responded to the survey, as well as publicizing their services. Access and awareness were identified as gaps.
- Respondents generally felt that local authorities and the Local Strategic Partnership could help best with research, advice and, of course, funding.
- The increasingly elderly population was cited as the single greatest challenge over the next 10 years, followed by funding and availability of volunteers.

- Respondents tend to work with other organizations, and believe that an overarching strategy for older people's services would make their work easier. Greater co-operation would also help.

## **Findings**

- The small number of returns is low. The large number of unknown addresses is also a worry. If the Council can't get in contact with these organizations using addresses believed to be accurate, how can older people – often with some kind of vulnerability – be expected to even know that the service exists, let alone make use of it?
- Funding remains an issue. However, there was a desire amongst respondents to grow and improve their services, and be part of a wider, more co-ordinated, more co-operative set of services for older people.

### **Recommendation 1**

This task and finish report should be presented to the Taunton Deane Local Strategic Partnership to demonstrate the importance of considering the needs of older people in its work.

### **Recommendation 2**

The Council recognizes the potential of the voluntary sector to add value to the services provided by the statutory sector, and will look at establishing better mechanisms for working with the voluntary sector and promoting and encouraging their work.

## **Age Concern**

Libby Lisgo, the Chief Executive of Age Concern Somerset was invited to a meeting to talk about her work and how to improve co-ordination of services for older people. Libby works full time for Age Concern Somerset and has been the Chief Executive since 1994. She was a Taunton Deane Borough Councillor between 1994 and 2007.

In 1991 Age Concern Somerset became a charity and company limited by guarantee with trustees. It was also extended to include North Somerset. It is a voluntary service organisation which works alongside its statutory partners, but not trying to duplicate what social services aims to do. Its agenda is preventative: to prevent ill health and the need for care.

A breakdown in the funding of Age Concern Somerset revealed that its main funding during 2006-07 came through grants from Somerset County Council and North Somerset Council. Legacies provide significant income. Other income comes from fees charged for charitable services, commercial trading and donations. 53 staff are employed by Age Concern Somerset, many on part-time. There are 400 volunteers. A new database had been introduced which tracks service users across different areas. It is hoped that within a year information will be available from this system to give a better picture of what groups do and what support they need.

Services provided include: -

- Advocacy. Clients are supported to take action or action is taken on their behalf. Some issues are complex, such as mental health problems and sometimes families and clients have different objectives. Advocates play a vital role in the work of Age Concern.
- The toe-nail cutting service is provided to 2,500 to 3,500 people by 40 to 50 volunteers.
- The Safe and Secure System, which aims to improve home safety and security. Volunteers install key safes and carry out tasks to prevent falls, such as putting in light bulbs;
- Befriending is an important service. It helps prevent loneliness and depression. 2,500 to 3,000 visits take place each year and 100 volunteers were befrienders who visit older people for a cup of tea and a chat;
- Exercise classes such as "Ageing Well" have been set up which teach classes such as Tai Chi and Flexercise. The National Lottery has funded a project called "Fit as a Fiddle" which has been running in other parts of the county in church halls, community rooms, sheltered housing schemes and residential homes. These classes aim to promote active involvement rather than passive receipt of services;
- Other schemes are being introduced such as "Men in Sheds" to prevent isolation amongst men who tend not to attend clubs.

The review group discussed this information and agreed with the following suggestion:

- Libby Lisgo asked that District and County Councils liaise more closely so that Age Concern and other organizations are not forced to duplicate work in different formats. This is very time consuming. A Local Implementation Team (LIT) exists which brings together representatives from Adult Social Care and other Somerset County Council departments, the Primary Care Trust and Age Concern Somerset. No representative is provided by Taunton Deane Borough Council. It was agreed to recommend this to the Executive.

### **Recommendation 3**

The Council will provide an officer representative to the Local Implementation Team.

### **Case Study: Neighbourhood Care**

Colin Croad was invited to give a presentation on Taunton Deane Neighbourhood Care, of which he is the Chairman. Colin has also been a Councillor at Taunton Deane so was well placed to understand the difficulties of the community and voluntary sector, in a local authority context. Whilst a Councillor, he was asked to join Taunton Deane Association for Neighbourhood Care, because of his association with the Council and his knowledge of the Henry Smith Grant Foundation. He is now Chairman of this local charity, which provided gardening and decorating services for the elderly and infirm. A survey had been carried out and the following information showed where the demand lay for the service and how much it had grown: -

- 58% of their client base are single females, 34% are single males and 8% are couples. Over 50% are aged between 80 and 90 years of age;
- A large percentage of the clients had stayed in the same home for over thirty years and 60% of those sampled were private owners or tenants. However, private owners were not always affluent, but did not want to move from their larger homes even when circumstances had changed;
- 58% of those sampled had an income of under £7,500 and a survey of private gardeners in the area showed they charged between £14 and £18 per hour, whereas Neighbourhood Care charged £7.00 per hour; and
- The number of garden maintenance clients had risen from 245 in 2003/2004 to almost 600 in 2007/2008. Examples were given which showed how valued this service was.

The review group discussed this information and made several findings:

- Taunton Deane has a higher than average older population and it is predicted that 40% of the population would be aged over 60 by 2020.
- Commitment is required at a high level from local agencies to ensure a “joined up” approach to services for older people. Information needs to be exchanged and the customer’s needs should be examined. This is a broad issue but vital, especially as the older population was growing so quickly;
- The provision of services is highly dispersed, partly provided by County Council, partly by District Council and partly by voluntary organisations, but there is no overarching policy;
- There was often no dialogue between voluntary organizations and the Police, although liaison groups did exist;
- It was considered that priority areas should possibly be considered rather than ad-hoc grants being made;
- There is a need for organisations to pull together. For example, a laundry service was withdrawn that had been useful to vulnerable elderly who were unable to carry out their own washing; and
- The CVS encourages groups to work together and this is becoming more common. However, it is sometimes difficult to achieve as most groups were passionate about the work they did.

The review group agreed that this service was particularly valuable not just because it provided a valuable service to older people, but also because it had a role to play in tackling crime and anti-social behaviour. Members appreciated that this service helped older people to remain in their homes for longer, and that even though the older person might be under-occupying the property, they retained the right to be there and that the council should focus on incentives if it wished to free up family dwellings for large households who needed social housing.

**Recommendation 4**

The Council should ensure that Taunton Deane Neighbourhood Care continues to be appropriately and sufficiently funded to provide its service to all who need it, particularly those who cannot use the service without financial assistance.

**Recommendation 5**

The Council should continue to respect the rights of elderly tenants to remain in their homes, even if they are under-occupying. Incentives should be used when attempting to persuade elderly tenants to downsize or move into sheltered housing.

**Older Services Care – the National Health Service**

Jon Sykes was invited to speak to the group. He has worked in the NHS in the area of psychiatric nursing for over 25 years. First, he explained that working with the definition of older people as those over 55 would involve a wide range of people with a wide range of needs that varied over time. Jon specifically works with the over 65 age group.

Jon provided some figures which illustrated the mental health problems faced by many older people (over 65). He also informed the Group how services had changed and the issues that might arise in the future:-

- One in four older people had symptoms of depression, but only one third of those would discuss this with their doctor. Of that third only half would be diagnosed and the majority of those treated were given anti-depressants rather than talking therapy.
- Older people had one of the highest rates of suicide.
- 40% of older people who visited their doctors have dementia, 50% of those in hospital and 50% of those in care homes also have this condition. This illustrates the seriousness of the illness, yet there is still a high level of discrimination regarding mental illness in society.
- According to the Audit Commission, the annual cost to the country of dementia is £14.3billion. This is more than the cost of cancer, stroke and heart disease **combined**.
- 70,000 older people in the UK have active symptoms of schizophrenia.
- The highest rate of alcoholism occurs between the ages of 55 and 74.
- The role of the traditional carer has changed for various reasons. Older daughters now worked, families were more dispersed and women were having children later.
- Mental health care has changed from the days when a Community Psychiatric Nurse would visit and often admit people to hospitals such as Tone Vale where there were long stay wards. Older people often did not leave. In 1995 Tone Vale closed and units were opened in the community.
- Although community teams expanded in areas such as occupational therapy and social work, services are not always co-ordinated. Anomalies do occur, such as

bus passes are free, but community transport is not and day centres are not easily accessible to those with dementia.

The review group discussed this information and made several findings:

- It would be useful for older people to be able to visit a centre where they can be met and greeted and given information regarding access to services such as laundry services, incontinence services and recycling;
- People are being encouraged to remain at home but many had no access to services, such as shopping or social activities. Often older people were afraid to access services for fear of being put into residential care. The possibility of designing a leaflet was discussed which would give information on where to access a range of services;
- Somerset Direct is a useful organisation, but it needs to be accessible and staff needed training regularly to be kept up to date with information;
- Older people, particularly those with mental health issues, need to be safe if they were to remain at home. Age Concern and the Police fit key safes and the Fire Service does fire checks, installs fire alarms and often refers other agencies for issues noted during their visit;
- The Handyman Service carries out minor repair jobs for the elderly and vulnerable with the aim of reducing accidents in the home and to help with security to remove the fear of crime. Home Aid is the local home improvement agency whose main aim is to enable the elderly and vulnerable to remain in their homes, avoiding the need for relocation and more expensive forms of care. It acts as an agent between the client and reputable contractors and filled a gap which existed within existing organisations;

The possibility of having a Members Champion was discussed, where a Member would specifically represent older people's interests in the Council. It was also clear to Members that the term "older people" covers an extremely diverse group of people and that the Council and its partners need to be aware of the danger of discrimination, alienation and inequalities when developing their services.

The review group made two recommendations after their discussions with Jon Sykes.

**Recommendation 6**

The Council should support a Member Champion who will promote and represent the needs of older people, particularly those who are 'hard to reach'. This person must be someone who not only understands the issues relating to older people, but can also intelligently and effectively challenge projects, initiatives and day-to-day operations of the council.

**Recommendation 7**

The review group wishes to re-iterate the importance of equalities impact assessments that take account of the needs of older people, and to provide training to officers and Councillors on older people's equalities issues, where appropriate.

## **County Council Services**

Jan Newton, the Assistant Area Manager for Adult Social Care at Somerset County Council, was invited to give her views on how services could be more co-ordinated.

Her role, along with the Manager for Coast and West Somerset Area, is to manage the operational service for these areas. This work involves co-ordinating social workers, home care provision, residential homes and day care.

The service provides care for adults over 18 who suffer with physical disabilities or sensory loss and for those over 65 who are frail and have support or personal care needs.

The service is used by those who cannot manage, perhaps because they have no family member to care for them. Social workers and occupational therapists assess their needs. The Government has issued the "Fair Access to Care Services" which aims to prioritise those with the greatest need.

Those with finances over £22,500 are self funded. This threshold figure, set by the Government, increases annually with inflation.

The Financial Assessments and Benefits (FAB) Team make visits to ensure charges are made fairly. For those on benefits, for example attendance allowance, such benefits are used to pay for home care. If a client has a significant change in circumstances, such as going into a nursing home, they will be reassessed. Each local authority sets their own rate which can be confusing for those moving to other areas.

Somerset Direct is the first point of contact for clients. They carry out telephone assessments then refer the client on to the Social Work Team. Everyone is entitled to an assessment.

It is hoped to blend the work of the Adult Social Care Worker and the Occupational Therapist more in the future. Sufficient training is needed in order to provide an appropriate level of care. There are difficulties with insurance.

The Single Assessment Process (SAP) was introduced to make assessment and subsequent care planning more effective and coordinated.

Care is holistic and records are kept by the individual. More effective technology is being examined so email can be used securely by service providers.

Other services available include the following:-

- The Rapid Response Home Care Team, which provides care for two weeks free of charge for those discharged from hospital;

- An out-of-hours service is available from 10pm to attend planned and emergency calls, when a carer is not available. This service has no time limit, as long as the cost does not outweigh nursing care. Key safes are often used to access properties;
- Carers are entitled to six weeks support free of charge for 2 to 3 nights a week. Carer support workers are allied to each doctor's surgery;
- Telecare equipment is available. Sensors are installed in the home so that an alert can be sent to a monitoring centre or a nominated carer. This enables carers to take a break and helps dementia sufferers to stay safely in their own home. Mock apparatus has been set up in a house in Taunton which demonstrates the service.

The Home Aid Partnership works with Somerset County Council and other agencies from various districts and a service plan is being created to identify areas which are done well and those where gaps existed.

The review group agreed that with funding so low, lateral thinking was important to carry out services effectively to avoid duplication and provide best value.

The County Council has also created the "Somerset Gateway", a one stop shop for all members of the community. It contains a searchable database of community groups that can be searched online, via the telephone, in person or by post.



## **Conclusion**

This review has made 7 recommendations. We hope that each recommendation can go some way to help the services, groups and organizations that exist in Taunton for the benefit of older people, to prepare for the future.

We know that cost is an issue for everyone, so we have tried to make recommendations that do not require any significant increase in funding. Where we have suggested increasing financial support, it is because we genuinely believe it should be done.

As with any review of this kind, the information contained in this report is at least as important as the recommendations we have made. We hope that in total, these 26 pages are helpful for anyone who works to support our aging population; or at the very least, as food for thought.

### **Chair of the Review**

Councillor Danny Wedderkopp

Email: [cllr.d.wedderkopp@tauntondeane.gov.uk](mailto:cllr.d.wedderkopp@tauntondeane.gov.uk)

### **Scrutiny Officer**

Alastair Higton

Email: [a.higton@tauntondeane.gov.uk](mailto:a.higton@tauntondeane.gov.uk)

### **Contact Address and Telephone**

Scrutiny Task and Finish Reviews

Democratic Services

Taunton Deane Borough Council

Belvedere Road

Taunton

TA1 1HE

Tel:01823 356415

## **Appendix A – Contact List for Voluntary and Community Sector Survey**

Citizen's Advice Bureau
Carers Taunton and Somerset
REMAP
Salvation Army
Chestnut Tree Club
Alzheimers Society
Blackdown Support Group
RELATE
Taunton Deane Community Transport
Stroke Association, SW Region
Taunton Womens Aid
Taunton Deane Neighbourhood Care
Taunton & District over 55's
Moorvale Credit Union
The Samaritans
Community Service Volunteers
Taunton Rotary Club
Wellington LETS

## Appendix B - Survey Questions

1. What is your organisation's name?
2. What types of work or services do you provide for older people (around 55 years of age and older)?
3. Is there a specific section of the older population that you focus on (certain illnesses or disabilities, for instance)?
4. How many older people do you help each year?
5. How do you fund the work you do for older people?
6. In your work with older people, what challenges does your organisation regularly face?
7. What gaps in services to older people do you think need to be filled?
8. What are your future plans for your organisation with respect to older people?
9. How could Taunton Deane Borough Council or the County Council help?
10. How could Local Strategic Partnerships help?
11. How closely do you work with other voluntary or community groups?
  - Very
  - Quite
  - Occasionally
  - Rarely
  - Never
12. How could your work could be made easier by:
  - a. Greater co-operation with other stakeholders?
  - b. An overarching strategic or co-ordinating strategy?
13. Over the next 10 years, what will be the biggest challenges facing organisations that provide services to older people?
14. What would the 'ideal' situation be for your organisation in 10 years time?
15. This survey is designed to find out what is being done for older people in the Taunton Deane area. If there are any other comments you would like to make, please tell us in the space below.

## Appendix C - Cover Letter for the Survey

Alastair Higton

Overview and Scrutiny

The Deane House, Belvedere Road, Taunton TA1 1HE

Tel 01823 356397

email: a.higton@tauntondeane.gov.uk

Our Ref:

Your Ref:

6<sup>th</sup> March 2008

<<name>>

<<address>>

Dear <<name>>

### **Survey of voluntary and community sector organisations that provide services for older people**

Some of our Councillors have begun a review into co-ordination and co-operation between voluntary and community organisations that provide services for older people in Taunton Deane.

As you are no doubt aware, the population of Taunton Deane is aging and the proportion of older people will continue to increase. Our Councillors would like to find out what Taunton Deane Borough Council can do to prepare for the demographic changes that will take place in the future.

In order to get a better idea of the current situation in Taunton Deane, we are carrying out a short survey of organisations with a focus on supporting and engaging with older people.

We hope that you can take a short time to complete the survey and return it in the enclosed pre-paid envelope.

I would be grateful if you could return the survey to us before the 31<sup>st</sup> March.

Yours <<appellation>>

Scrutiny Officer

## Appendix D - Full List of Survey Responses

<b>Q1</b>	<b>What is your organisation's name</b>	100.0%
	The Salvation Army, South Street, Taunton - 01823 274780	
	Samaritans of Taunton and Somerset	
	Relate Somerset.	
	Taunton CAB, 44 Station Road, Taunton TA1 1NS - Liz Fothergill (01823 448958) e:liz.fothergill@tauntoncab.org.uk	
	The Clovermarle Stroke Club.	
<b>Q2</b>	<b>What types of work or services do you provide for older people (around 55 years of age and older)?</b>	100.0%
	CAMEO club once a month. Third Wednesday afternoon 2.30 - 4.00.	
	Emotional support	
	Whilst we don't deliver services specifically for older people all our services are available to this age group and indeed are accessed by them. We keep demographic data that helps us ensure we are meeting the needs of all age cohorts.	
	Advice information and support on all issues including benefits, debt, consumer, housing and employment.	
	We provide on a Tuesday, a 'day centre' where Stroke Victims can attend giving them a day out, giving their carers a day off. We provide therapeutical support, diversions, entertainments, trips out. We provide Transport to/from our location and lunch. We accept only Stroke Victims and our membership is dominantly (but not exclusively) over 60's.	
<b>Q3</b>	<b>Is there a specific section of the older population that you focus on (certain illnesses or disabilities, for instance)?</b>	100.0%
	No	
	All	
	See above - general welfare and mental health/sexual health.	
	Not specifically but see above.	
	We focus on stroke victims.	

<b>Q4</b>	<b>How many older people do you help each year?</b>	80.0%
	Unable to say - new venture.	
	Not recorded.	
	Over 50 years are approximately 33% of our work. Over 65 years are approximately 10% of our work.	
	We see around 6,000 clients per annum.	
	Membership running at about 25. This is limited by space available and the capacity of our volunteers.	
<b>Q5</b>	<b>How do you fund the work you do for older people?</b>	100.0%
	Salvation Army funds and donation from those attending.	
	Charitable donation.	
	Grants, voluntary income and charity for services where appropriate.	
	Through grants from:- TDBC, SCC, Legal Services Commission, PCT, Wessex Water, Somerset NHS Partnership.	
	All helpers are volunteers. TDBC assists by paying the bulk of our room cost (rent), other operating expenses are funded by Members and by donations.	

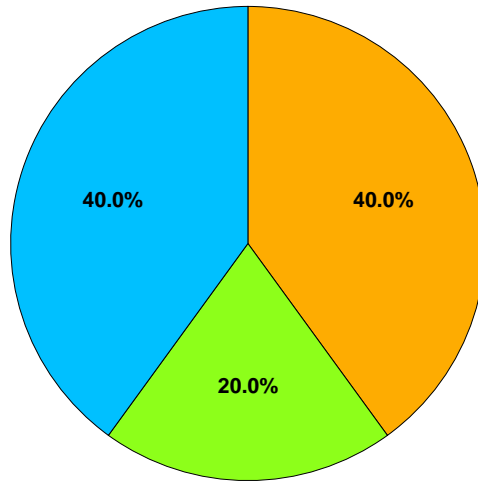
<b>Q6</b>	<b>In your work with older people, what challenges does your organisation regularly face?</b>	100.0%
	None at present.	
	Publicising our service to those in need. Funding.	
	Generally Relate Somerset is well geared to working with older people, over the years challenges have largely been mitigated but inevitably funding issues can be a problem.	
	Competition from the FAB team. Some older people have no idea of their rights to benefit so awareness raising is vital. We struggle to meet the demand of phone enquiries which means some people lose out.	
	The challenge does not relate in the main to an 'older people' requirement but to a stroke victim requirement involving various levels of disability.	
<b>Q7</b>	<b>What gaps in services to older people do you think need to be filled?</b>	100.0%
	Don't know yet - just started work in this area.	
	Loneliness.	
	Issues around access probably remain a problem - so services that can address this would be good.	
	These could social isolation, transport, access to information IT Access, mobility, rural deprivation/isolated etc, etc. These are all outside our compass but clearly have a direct impact on the group's ability to access our services.	
	Awareness of benefits and their rights. Easy access by phone to good referral systems.	
	This is what you are paid to ascertain.	

- Q8 What are your future plans for your organisation with respect to older people?** 100.0%
- Once our Community Hall is built 08/09, lunch club, advice centre, CAMEO, whatever the need is in our area.
- To reach more.
- We are planning to introduce an email counselling and telephone counselling service to meet some of the above issues. Our marketing and promotional information is in the process of being redesigned (larger font size fonts size) which will also help.
- Better phone access if we can fund it and resource it. Somerset Advice agencies (CAB, West Somerset Advice Bureau) are applying to the lottery to fund a better countywide referral and advice hub which would benefit older people. This bid supports the network and infrastructure not the "hardware".
- Our organisation aspires to nurture a continuance of volunteers and a financial buffer to assist future members and volunteers in the instance of funding difficulties.
- Q9 How could Taunton Deane Borough Council or the County Council help?** 100.0%
- Yes - perhaps a donation to the cost of new building also information of what is needed in the South Street area.
- Publicity. Grant.
- Funding support. Forum. Background research.
- They are supporting our bid to the lottery. Could fund a countywide CAB phone service.
1. By sustaining the financial support in the way of room rental. 2. By encouraging the NHS to provide a greater level of support to Stroke Victims including via organisations such as ourselves.
- Q10 How could Local Strategic Partnerships help?** 80.0%
- As question 9.
- As above
- As questions 8 and 9.
- I don't know what this picturesque term means!



**Q11 How closely do you work with other voluntary or community groups**

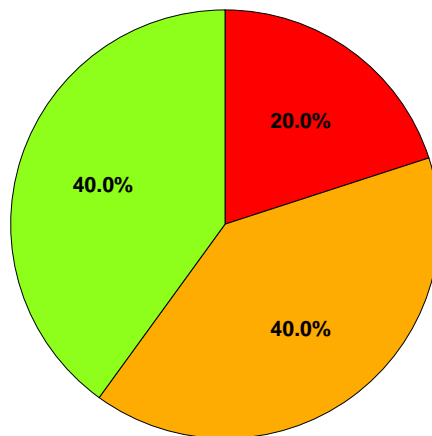
2	40.0%	<i>Very</i>
1	20.0%	<i>Quite</i>
2	40.0%	<i>Occasionally</i>
	0.0%	<i>Rarely</i>
	0.0%	<i>Never</i>



<span style="color: red;">■</span> No reply	<span style="color: green;">■</span> Quite	<span style="color: yellow;">■</span> Rarely
<span style="color: orange;">■</span> Very	<span style="color: blue;">■</span> Occasionally	<span style="color: purple;">■</span> Never

**Q12 How could your work be made easier by:**

2	40.0%	<i>Greater co-operation with other stakeholders?</i>
2	40.0%	<i>An overarching strategic or co-ordinating strategy?</i>



<span style="color: red;">■</span> No reply
<span style="color: orange;">■</span> Greater co-operation with other stakeholders?
<span style="color: green;">■</span> An overarching strategic or co-ordinating strategy?

- Q13 Over the next 10 years, what will be the biggest challenges facing organisations that provide services to older people?** 80.0%
- Not been here personally long enough to comment.
- Increasing elderly population. Higher demand on our service coupled with fewer volunteers.
- Increasing ageing population, increasing demands from this cohort.
- Funding. Volunteer resources.
- Q14 What would the 'ideal' situation be for your organisation in 10 years time?** 80.0%
- Community Centre up and running support there is 55+ age range and the community in general.
- More volunteers, funding. Everyone in need of emotional support to be aware of Samaritans 24/7 service.
- Be able to meet demand and meet needs.
- I believe CAB should be located as part of a "One Stop Shop" in a central town location with, for example, Age Concern, Shelter, Credit Union. There should be an efficient local county telephone number for advice with a referral system.
- Q15 This survey is designed to find out what is being done for older people in the Taunton Deane area. If there are any other comments you would like to make, please tell us in the space below.** 20.0%
- Our building needs to be used - I don't want to start something that is already being done nearby. I need to know what's needed and we will try and fill the gap.
- Q16 If you would like a copy of the final report of this review, please tick the box below**
- 4 80.0% Yes
- Q17 Also if you are happy to be contacted by us again on this subject, please tick the box below.**
- 4 80.0% Yes

## **Appendix E - Full List of Recommendations**

### **Recommendation 1**

This task and finish report should be presented to the Taunton Deane Local Strategic Partnership to demonstrate the importance of considering the needs of older people in its work.

### **Recommendation 2**

The Council recognizes the potential of the voluntary sector to add value to the services provided by the statutory sector, and will look at establishing better mechanisms for working with the voluntary sector and promoting and encouraging their work.

### **Recommendation 3**

The Council will provide an officer representative to the Local Implementation Team.

### **Recommendation 4**

The Council should ensure that Taunton Deane Neighbourhood Care continues to be appropriately and sufficiently funded to provide its service to all who need it, particularly those who cannot use the service without financial assistance.

### **Recommendation 5**

The Council should continue to respect the rights of elderly tenants to remain in their homes, even if they are under-occupying. Incentives should be used when attempting to persuade elderly tenants to downsize or move into sheltered housing.

### **Recommendation 6**

The Council should support a Member Champion who will promote and represent the needs of older people, particularly those who are 'hard to reach'. This person must be someone who not only understands the issues relating to older people, but can also intelligently and effectively challenge projects, initiatives and day-to-day operations of the council.

### **Recommendation 7**

The review group wishes to re-iterate the importance of equalities impact assessments that take account of the needs of older people, and to provide training to officers and Councillors on older people's equalities issues, where appropriate.