CHELTENHAM
BOROUGH COUNCIL

Cheltenham Borough Council Cabinet

Meeting date: **Tuesday, 14 July 2026**

Meeting time: **6.00 pm**

Meeting venue: **Council Chamber - Municipal Offices**

Membership:

Councillors Paul Baker, Flo Clucas, Steve Harvey, Rowena Hay, Jamie Jamieson, Peter Jeffries, Alisha Lewis, Richard Pineger and Izaac Tailford

---

Important notice – filming, recording and broadcasting of Council meetings

This meeting will be recorded by the council for live broadcast online at www.cheltenham.gov.uk and www.youtube.com/@cheltenhambc/streams
The Chair will confirm this at the start of the meeting.

If you make a representation to the meeting, you will be deemed to have consented to be filmed and to the possible use of those images and sound recordings for broadcasting and/or training purposes.

If you have any questions on the issue of filming/recording of meetings, please contact Democratic Services.

Contact: democraticservices@cheltenham.gov.uk
Phone: 01242 264 246

CHELTENHAM
BOROUGH COUNCIL

SECTION 1 : PROCEDURAL MATTERS

1 Apologies

2 Declarations of interest

3 Minutes of the last meeting (Pages 5 - 16)

4 Public and Member Questions and Petitions
Questions must be received no later than 12 noon on the seventh working day before the date of the meeting

SECTION 2 :THE COUNCIL
There are no matters referred to the Cabinet by the Council on this occasion

SECTION 3 : OVERVIEW AND SCRUTINY COMMITTEE
There are no matters referred to the Cabinet by the Overview and Scrutiny Committee on this occasion

SECTION 4 : OTHER COMMITTEES
There are no matters referred to the Cabinet by other Committees on this occasion

SECTION 5 : REPORTS FROM CABINET MEMBERS AND/OR OFFICERS

5 General Fund and Housing Revenue Account Outturn Report 2025-26 (Pages 17 - 56)
Report of Cabinet Member for Finance and Assets, Councillor Peter Jeffries

6 Advice and Inclusion contract (Pages 57 - 78)
Report of Cabinet Member for Housing and Customer Services, Councillor Flo Clucas

7 Review of Local Development Scheme and amendment to Statement of Community Involvement (Pages 79 - 114)
Report of Cabinet Member for Planning and Building Control, Councillor Paul Baker

8 Corporate Plan Year One Review (Pages 115 - 144)
Report of the Leader, Councillor Rowena Hay

CHELTENHAM
BOROUGH COUNCIL

9 Cheltenham Town Centre and Vacant Units Action Plan update (Pages 145 - 158)
Report of Councillor Izaac Tailford, Cabinet Member for Economic Development, Culture, Wellbeing and Public Realm

10 Cultural Grant Awards for 2026-27 (Pages 159 - 172)
Report of Cabinet Member for Economic Development, Wellbeing, Culture and Public Realm, Councillor Izaac Tailford

11 Nominations to Outside Bodies (Pages 173 - 182)
Report of the Leader, Councillor Rowena Hay

SECTION 6 : BRIEFING SESSION

- Leader and Cabinet Members

12 Briefing from Cabinet Members

SECTION 7 : DECISIONS OF CABINET MEMBERS

Member decisions taken since the last Cabinet meeting

SECTION 8 : ANY OTHER ITEM(S) THAT THE LEADER DETERMINES TO BE URGENT AND REQUIRES A DECISION

Section 10: BRIEFING NOTES

Briefing notes are circulated for information with the Cabinet papers but are not on the agenda

SECTION 9 : LOCAL GOVERNMENT ACT 1972 - EXEMPT BUSINESS

13 Local Government Act 1972 - Exempt Business
The Cabinet is recommended to approve the following resolution:-

“That in accordance with Section 100A(4) Local Government Act 1972 the public be excluded from the meeting for the remaining agenda items as it is likely that, in view of the nature of the business to be transacted or the nature of the proceedings, if members of the public are present there will be disclosed to them exempt information as defined in paragraph 3, Part (1) Schedule (12A) Local Government Act 1972, namely:

Paragraph 3; Information relating to the financial or business affairs of any particular person (including the authority holding that information)

CHELTENHAM
BOROUGH COUNCIL

14 EXEMPT Minutes of last meeting (Pages 183 - 186)

CHELTENHAM
BOROUGH COUNCIL

Cheltenham Borough Council
Cabinet
Minutes

Meeting date: **26 May 2026**

Meeting time: **6.00 pm - 7.06 pm**

In attendance:

Councillors:

Paul Baker, Flo Clucas, Rowena Hay, Peter Jeffries, Alisha Lewis, Izaac Tailford, Richard Pineger, Steve Harvey and Jamie Jamieson

Also in attendance:

Gareth Edmundson (Chief Executive), Paul Minnis (Director of Major Development and Regeneration) and Adele Taylor (Interim Director of Finance and Operations (S151 Officer))

---

1 Apologies

There were none.

The Leader took the opportunity to thank two Members retiring from Cabinet: Councillor Atherstone who has now joined Gloucestershire County Council following the May election, and Councillor Collins who is now Deputy Mayor.

She welcomed two new Cabinet Members: Councillors Harvey and Jamieson, responsible for Waste, Recycling and Parks, Gardens and Green Open Space, and Safety and Communities respectively.

2 Declarations of interest

There were none.

3 Minutes of the last meeting

The minutes of the meeting held on the 14 April were approved as a true record and signed accordingly.

4 Public and Member Questions and Petitions

Three public questions had been received, with written responses published on the website:

1. Question from Peter Frings to the Leader, Councillor Rowena Hay

Due diligence regarding Horizon Aero Group and the attempted sale of the airport. The auditors of the most recent accounts of Gloucestershire Airport, in their notes to the accounts, highlighted that no formal letter of financial support was ever received from Horizon Aero Group. Neither of the two Horizon Aero Group Directors – who made the vague representations which the Airport directors relied on – have any other directorships in the UK. There is one other director of Horizon Aero Group who is a director of two micro companies valued at £8k and £5k (one of which is Vayu Aviation Services.). Horizon Aero Group is a shell created only in Jan 2025. It has no filing history. Its confirmation statement is overdue. No Identity verification of the 3 directors has been filed at Companies House. It has share capital of £100. The backing company was obviously Vensa Infrastructure in India, which seems a more substantial company… but it is a construction company in India. So my question is: as owners of the Airport, did Cheltenham Borough Council discover all these facts for itself, yet still go ahead and attempt a sale to a hastily established shell consortium with no substantive business experience, no experience of running an airport, and which was unable to demonstrate that it had the funding to complete the sale? Or did the council simply not do any due diligence at all?

Cabinet Member response

As often with the nature of such transactions, it is not unusual for investors to set up a special purpose vehicle, or SPV. As part of the due diligence process, it was agreed that Horizon Group's people, investors and the team behind them had significant experience across many fields within the aviation industry, which combined with the skills and experience that will come with Gloucestershire Airport Limited, was one of the key considerations behind the selection of Horizon.

Therefore based on the facts at the time, we were satisfied.

The fact that investors changed their mind as the due diligence process was undertaken is a standard risk of any transaction, as is with someone buying a house. There are never any guarantees.

2. Question from Peter Frings to the Leader, Councillor Rowena Hay

The most recent accounts for Gloucestershire Airport have an impairment charge of £6.7m, which contributed to a loss for the year of £7.6m, which is on top of a loss of £1.6m the previous year. Can the Leader of the Council explain how this impairment charge appeared out of nowhere? Could it be that with a sale coming up, there would obviously be independent valuations of assets which would expose all the over-valuations in previous years which had been used to mask losses, hence the need to reverse the previous over-valuations? Could the Leader of the Council also offer an explanation to residents of how a public asset which was stated as having a balance sheet value of £26.6m in March 2021 is now only worth £11.9m in March 2025?

Cabinet Member response

The impairment charge referred to is related to the previous book value of the company and the financial terms agreed, it is an accounting function only, not an actual cost.

Valuation for accounting purposes commonly does not reflect the market value and this is an important difference to recognise. Given this is purely an accounting function, independent market valuations have been undertaken on the site ahead of sale and these are reflective of a much higher value than the book value.

Due to a clerical error the full text of question 3 was not published correctly. The Leader read out the missing section for the public record. The answer will be reviewed and if additional information is required this will be provided in writing.

3. Question from Miriam Frings to the Leader, Councillor Rowena Hay

Leaded aviation fuel is potentially a significant health risk for children living under a flight path. A summary of recent research is given in the paper "Lead exposure from general aviation emissions in the UK: A review and call for action" by Ashley Mills and Stephen Peckham, published in Public Health Challenges in 2022. https://doi.org/10.1002/puh2.27. Leaded aviation fuel is mainly used by light propellor aircraft. Gloucestershire Airport has one of the highest number of light aircraft movements in the UK. Cheltenham has one of the largest concentrations of residences close to the downwind area of an airport. Could the Cabinet Member find out: what volumes of leaded aviation fuel have been used at Gloucestershire Airport in each of the last 3 years? If leaded aviation fuel is used in aircraft flying into and out of Gloucestershire Airport, will the Council commit to organising sampling of children living in the west of Cheltenham underneath the flight path, to assess whether they have level of lead in their blood higher than the national average? If the Council believes that this does not fall within its own public health remit, will the Council identify the relevant body that does have responsibility for assessing this health risk, and formally request that they carry out an assessment?

Cabinet Member response

Thank you Ms Frings for her question.

This does not fall within this council's public health remit. The county council, in whose remit this will fall, has provided the following response:

Gloucestershire County Council's Public Health function does not commission or routinely undertake population-wide blood lead screening. This reflects national policy that screening of children without clinical indication is not routinely recommended in the UK. Instead, surveillance relies on laboratory testing and targeted investigation where elevated levels are identified. Responsibility for surveillance, specialist risk assessment, and incident response relating to lead exposure lies primarily with the UK Health and Security Agency (UKHSA), working alongside health system partners and local authority Environmental Health teams.

In England, there is the Lead Exposure in Children Surveillance System (LEICSS Lead Exposure in Children Surveillance System (LEICSS) annual report, 2025 - GOV.UK) coordinated by the UKHSA. LEICSS is a passive national surveillance system, whereby laboratories automatically notify UKHSA of children (aged 0–15) with elevated blood lead concentrations. Public health action is triggered when a child is found (through routine clinical testing) to have a blood lead level above the intervention threshold, rather than through population screening programmes.

If you would like to follow this up, please contact Gloucestershire County Council Public Health department. If required, I can ask officers to provide you with the correct contact information.

None of the questioners were present to ask supplementary questions.

5 Leasehold Ownership Policy

The Cabinet Member for Housing and Customer Services introduced the policy, explaining that it had been reviewed by the Leaseholder Forum and the Cabinet Housing Committee, and recommended to Cabinet for approval with no significant amendments.

The Leader welcomed the consultation with leaseholders and noted that they are happy with the suggested moves which will improve their input. The Cabinet Member for Housing and Customer Services agreed that the Leaseholder Forum is important to ensure that leaseholders have been able to share their thoughts, and was pleased that this will provide them with assurance that their voice is being heard and improvements are being made.

RESOLVED THAT:

- **the Leasehold Ownership Policy be approved.**

6 Award of rent support grant to voluntary sector organisation - Whaddon United Football Club

The Cabinet Member for Finance and Assets highlighted the council's wider ambitions for the thriving and voluntary community sector, many of whom utilise buildings owned by the council. How the council can continue to support these groups within its own commercial journey can provide a challenge; rent support grants were introduced in 2016, allowing community organisations to receive a percentage discount of the commercial rent by demonstrating how their organisation, through the use of the building, contributes to the council's agreed corporate priorities. This is appropriate as the council needs to modernise and take Cheltenham's communities on the journey in a supportive way. The Cabinet Member said that the report sets out the policy and this particular application, and highlighted with pleasure that once again the council has been able to support a community organisation.

A Member asked, now that ten years have passed, whether a review of the policy was planned. The Cabinet Member for Finance and Assets noted that he would need to check whether there has been a full review but agreed that this is worth considering. He suggested this review would probably sit with other Cabinet colleagues. The Leader noted that the council is very proud of the policy but agreed that the form applicants are required to fill in could be updated and improved.

The Cabinet Member noted that it would be interesting to ask the finance team and property team to provide a report on how much revenue the council has foregone in support of communities over the past ten years.

Members made the following comments:

- a review of the policy and form by the Cabinet Member for Economic Development, Wellbeing, Culture and Public Realm would be a positive step, to ensure that both are more applicable to sporting clubs;
- this rent support grant will have a small impact on the council but a huge impact on the club; obviously, collectively, the grants add up to a much bigger pot for the council but each one makes a difference;
- the decision is welcomed as the council must do all it can to support the voluntary sector and local sports clubs who contribute so much to the town;

- as the ward member, this is a favourite project, partly because it is part of the legacy of the late Paul Jones who helped to make it happen, and partly because it is turning a building previously used as a resource centre by Cheltenham Borough Homes back to community use. Nobody knew quite what to do with these buildings right in the heart of their communities, and this is one of the best solutions so far - the club's first ever proper community clubhouse. It is excellent that the council is providing financial support and can hopefully do more in the future.
- Whaddon United has existed for over 70 years, has adult and youth teams but has never had a clubhouse. It is always busy and is already asking for more space, six months after taking it on;
- it is great that there are two significant football clubs in Whaddon; sporting clubs are often unrecognised for their huge contribution to their communities. They teach young people football skills and much more, playing a huge part in the council's offer. Anything the council can do to support these groups is to be commended.

RESOLVED THAT

1. **the following rent support grant be approved:**
   - **Applicant: Oakley Community Resource Centre**
   - **Recommended rent support grant: A rent support grant of 56% of current market rent.**

2. **authority be delegated to the Participation and Engagement Team Leader, in consultation with One Legal to agree the terms of a rent support grant agreement with the applicant.**

7 Briefing from Cabinet Members

Cabinet Members briefed their colleagues on recent events as follows:

Cabinet Member for Finance and Assets:

- housing benefit changed some time ago to universal credit but has taken a long time to be fully implemented; the council has received a letter thanking all local authorities for their support in that process, actually making government ideas happen. He said it has not always been a smooth process for some customers and residents but the transition is now slowly coming to an end.

Cabinet Member for Housing and Customer Services:

- recently attended a meeting of the Cheltenham Street Pastors, with people from all over the country, the president, Gloucestershire's Deputy Commissioner of Police, and the senior cleric from Tewkesbury Abbey. It was a great occasion where people were able to speak about what was important, and she was able to highlight Cheltenham's work through No Child Left Behind, and what is being done in the night-time economy to make the town safer for women and young people. She had also had the opportunity to introduce the president of the Cheltenham Street Pastors to ITSA (IT Schools Africa) to build potential connections.

Cabinet Member for Planning and Building Control:

- the Strategic Local Plan is the main focus at present, and he has been impressed by the quality of work so far, the research and officer engagement, and how the three authorities are working together. Any concern that any of the individual authorities may lose some of their influence has not happened.

The Cabinet Member for Climate Emergency reported on a month of steady, practical progress on climate and resilience across Cheltenham, including:

- the opening of the greenhouse in St. Paul's, which is a permanent community hub for climate action, helping residents and businesses take practical steps locally;
- Cheltenham Zero continuing to deliver funded projects supporting local businesses to reduce energy use and emissions;
- the heat network project now formally underway, with governance established and feasibility work progressing, which will position Cheltenham to attract national investment;
- over 100 council homes upgraded to EPC C or better, which cuts carbon and improves living conditions. Further phases are coming forward.
- flood resilience strengthened with new protections installed and community flood wardens reaching thousands of households.
- an acceleration of public engagement, with Cheltenham is hosting the internationally-renowned Everything Electric show from the 12–14 June at the race course. There will be EV test drives on offer, plus solar panels, heat pumps and opportunities to ask questions;
- the upward trend in extreme weather events, demonstrated by the recent heatwave, is indicative of climate change, and some immediate measures have been put in place, such as waste collection starting an hour earlier. Going forward, Cheltenham will continue to prepare for the future with urban tree planting and other heat resilience measures;
- a long-term flood risk report to cover the period up to 2040 is also being prepared, and we are building awareness through initiatives like the national emergency briefing which should be delivered to all staff at some point.

The Cabinet Member for Economic Development, Wellbeing, Culture and Public Realm thanked Cheltenham Playhouse for inviting him, the Leader and the Mayor to the opening of the Cheltenham Fringe Festival, a great event filled with talent across a range of different artistic pursuits. This inclusive and wide-reaching festival reaffirms the support the council gave to the Playhouse last year, financially and with a long-term lease, to secure this great asset for the future.

He said that during the election, he spoke to many residents and businesses concerned about the town centre and high street, and while they understand that a lot of the biggest issues are truly out of local council control, he said the council is doing what it can to support and strengthen the town centre. We need to be honest about the challenges which have hit both the retail and hospitality sector hard – increased business rates and global events which have driven increases rents, wages, energy and goods – but said it is more important than ever that the council is clear about what can be done and what is being done to support the high street:

- Cheltenham is still performing strongly - overall vacancy rates at 7.8% compared to the national average, which can be as high as 17% - but some streets are facing higher vacancy rates and a few empty units in a prominent location look bad, and large empty buildings such as Cavendish House and the former Oasis shop on the High Street have a disproportionate impact due to their visibility. . The council is already taking a firmer approach on these matters, by working to hold Canada Life to account over Cavendish House, and he was pleased to say the Oasis store is now being renovated and will imminently be let to new tenants;
- the installation of artwork on Cavendish House by Paint Festival director Andy Dice Davies is very welcome; it will deter tagging, keep the building protected and it improve the look of the Promenade;
- the council is currently awaiting the next update from Canada Life about their future plans but the council has provided positive feedback on their most recent pre-planning application. The council responds as quickly as possible to avoid holding up any processes because Cavendish House is such a vital part of the town centre.
- the council continues to challenge property owners who leave their units empty for long periods without good reason. To support this, clear guidance will be produced setting out the powers available to local authorities under current legislation and how they can be used to enable consistent and transparent action to be taken where it is needed to ensure the town centre is properly populated with shops and cafes;
- he and officers have also been actively listening to business, both through the BID and directly, and continue to work collaboratively to encourage footfall in the town centre, increase dwell time and strengthen Cheltenham's offer. This includes working closely with partners and the county council to improve the public realm cleanliness and overall experience of being in the town centre to encourage repeat visits, promote investment and encourage new shops to come to the town. It also means taking a less disjointed approach, making sure things are properly protected so they require less replacement, and other mitigation techniques;
- a new town centre public realm approach, created through public realm meetings with the BID, will be released at the start of June alongside a public survey to ask residents, visitors and businesses for their thoughts and their priorities for the town centre.
- we also continue to work with Max Wilkinson MP to campaign nationally to support local businesses. and maintain a vibrant town centre, which remains a top priority for the council in the face of ongoing and upcoming national challenges far outside even the government's control. We have to do as much as possible to support our town centre and will continue to listen and work in partnership and take action to protect and strengthen Cheltenham's high

street, and its amazing businesses and cultural sector.

The Cabinet Member for Waste and Recycling and Parks, Gardens and Green Open Space said he delighted to join the Cabinet and has been going through his briefs with senior officers – he thanked them for their patient and professional approach.

He also welcomed the Cabinet Member for Housing and Communities meeting with the Cheltenham Street Pastors, having seen as Mayor how they contribute to Cheltenham's night-time economy and safety, along with the Cheltenham Guardians.

The Cabinet Member for Major Developments and Housing Delivery noted that there is some very exciting exempt news that she hopes to be able to share shortly.

The Cabinet Member for Safety and Communities said he is new to Cabinet and still learning his role, but shared the following:

- Cheltenham has been awarded purple flag accreditation for the 11th year running, an award granted by the Association of Town and City Management and capturing a whole raft of factors that make a town centre a safe and thoroughly enjoyable place. They evaluate clear evidence about the place's safety, diversity, vibrancy, accessibility, cleanliness and how it works with partner organisations around the town, and the award reassures everyone that they can come to Cheltenham and have a nice, safe night out. This is particularly important for Cheltenham as the festival town, a crucial underpinning to its reputation, and something of which we can be proud.

The Leader welcomed the new members of the Cabinet and congratulated the Cabinet Members who were re-elected or elected.

She took the opportunity to respond to discussion on social media around the MX, given her involvement from Day One and the council's determination to keep this really important project on track as a taster for the eventual Golden Valley purchase. She highlighted:

- the project was completed in July 2024 and, now entering the third year of operation, it has demonstrated strong financial and operational performance which align with the original objective to create co-working space for businesses within Cheltenham. This includes attracting businesses that align with Golden Valley, and may wish to occupy that space in the future;
- it has also provided an opportunity to regenerate the area around the Minster gardens, which was very derelict;
- the financial forecast for 2026-27 is to deliver a revenue income of £848k, representing a 27.6% net margin. This is positive, having grown steadily from 24-25 when it achieved 20%;
- the operation has already repaid £213k of the £340k in the tier 2 contingency funding which the Council approved in June 2023. Full repayment of this contingency is on track for December 2026 in line with the original schedule, and longer-term forecasts indicate that the full council investment will be

repaid over a 25-year period in line with the original business case. This will need to be closely monitored and the MX team must carefully manage the mix between more permanent tenants who lease fixed spaces alongside managing the flow of hot-desking and flexible desks to ensure that the revenue remains strong;

- it also provides a fantastic event space, although that does need maximising as part of the overall model;
- the financial performance has been driven by strong occupancy levels and interest, particularly in private office space. The occupier mix reflects a broad and healthy ecosystem including established prime tenants, high growth SMEs (small and medium-sized enterprises), and early-stage start-ups. There is some significant company interest that will be evident in the future;
- the project is successfully delivering against its economy development objectives, supporting high-value sectors - notably cyber job creation and skills development - and creating more opportunities for local people. It is also providing inward investment and positioning itself as a key strategic asset within the Golden Valley development;
- the MX continues to play a key role in supporting business growth and innovation via the mentoring to start-ups. Its events programme is well established and growing, including the re-branded Connect series, positioning the MX as a central hub for the cyber and technology community. It has been an amazing journey to be part of and to see how much the MX has achieved;
- there are some risks and issues: the MX has been working with council teams and with the church to actively manage that impact of continuing anti-social behaviour in the area. It is important that people working in those spaces feel safe, especially as some with global partners have now extended their opening hours to reflect the different working hour;
- the café is not generating the level of income or business expected considering the location and access to members within the MX, which is disappointing, and is currently in a performance management period that needs to be closely managed. She has met with officers to look at the finances and noted that there has been a lot of turnaround.

She ended by saying that there is a long way to go but it is really promising that occupancy is at 100%, and the space is regularly reconfigured to ensure its most economical use. She said the point will come when there will be no more space to move things around.

8 Cabinet Member Decisions since the last meeting

There were three decisions to share on this occasion:

28 April: Decision of Cabinet Member Housing and Customer Services – CBC contribution to rough sleeping services across the county 2026-27

6 May: Decision of the Leader – Ubico – Shareholders Agreement and Amendment of Articles of Association

15 May: Decision of the Leader – Gloucestershire Airport Limited – Shareholder Decision

9 Local Government Act 1972 - Exempt Business

RESOLVED THAT:

In accordance with Section 100A(4) Local Government Act 1972 the public be excluded from the meeting for the remaining agenda items as it is likely that, in view of the nature of the business to be transacted or the nature of the proceedings, if members of the public are present there will be disclosed to them exempt information as defined in paragraph 3, Part (1) Schedule (12A) Local Government Act 1972, namely:

Paragraph 3: Information relating to the financial or business affairs of any particular person (including the authority holding that information)

10 A Property Matter

The Cabinet Member for Major Development and Housing Delivery and the Cabinet Member for Finance and Assets introduced the report as circulated to Cabinet, and provided an opportunity for questions to be asked.

RESOLVED THAT:

- **the recommendations in the report be approved.**

This page is intentionally left blank

Cheltenham Borough Council

Cabinet - 14 July 2026

General Fund & Housing Revenue Account Outturn Report 2025-26

Accountable member:

Cllr Peter Jeffries, Cabinet Member for Finance and Assets

Accountable officer:

Adele Taylor, Interim Director of Finance and Operations (Section 151 Officer)

Ward(s) affected:

All

Key Decision: No

Executive summary:

This report summarises the Council's financial performance and sets out the General Fund (GF) and Housing Revenue Account (HRA) revenue and capital outturn position for 2025/26. The information contained within this report has been used to prepare the Council's Statement of Accounts for 2025/26.

For the financial year 2025/26 the Council's general fund position is a £16,159 underspend that will be transferred to general balances. The HRA position is a surplus of £141,669 for the year.

This report details variances by service area, with a more detailed explanation for any over or underspends above £50k in the general fund.

Whilst preparing the final year end position, we have reviewed areas where planned underspends of revenue budgets could be allowed, with the agreement of the Section 151 Officer, to meet the needs of approved service delivery. This is often due to the timing of commitments and expenditure needing to be matched. Any other carry forward requests, including budget underspends that have been carried forward in previous financial years are subject to full Council approval at the financial outturn meeting held after the year end.

This report compares our outturn position to the revised budget that was set alongside the

budget setting report for 2026/27 approved by full council in February 2026. At that time, it was anticipated that we would need to take £662k from our general fund reserves against an original plan of adding £560k to general fund reserves. With the underspend in-year of £16k, this has reduced this to an overall use of reserves of £646k.

This leaves the General Fund balance at £1.459m with a plan to add just below £316k during 2026/27 to bring these reserves to an optimum level. It should be noted that assumes during 2026/27 delivery of savings totalling £1.054m as well as cover off any emerging financial pressures during the year in full.

In addition to the General Fund reserve balance, we hold a number of earmarked reserves which are held for specific purposes and often recognise that the timing of income and expenditure and future commitments where they are not always aligned. At year end a total of £1.336m has been added to specific earmarked reserves, including £379k of carry forward requests and approvals.

This report also provides information on the Council's capital programme including any budgets required to be slipped into 2026/27 from 2025/26.

For the HRA, the actual Capital expenditure for 2025/26 is a total of £27.874m against a budget of £33.122m. The Capital profile has been revised and any underspends are slipped into future years to recognise when projects are actually being delivered.

As part of the management of our budget within 2026/27 the Capital programme for 2026/27 will be reviewed and any amendments will form part of the first quarter monitoring reports in September 2026.

Finally, the Council's Treasury Management Policy requires the Section 151 Officer to report to members annually, by the 30 September, on the treasury management activities and treasury management indicators for the previous financial year. This report also seeks to meet this requirement.

Recommendations: That Cabinet notes and recommends that Council:

1. **notes the General Fund revenue outturn position for 2025/26 after the application of carry forward requests and following the use of earmarked reserves, of an underspend of £16,159 against the 2025/26 revised budget approved by Council on 27 February 2026**
2. **notes the General Fund carry forward requests detailed in Appendix 5.**
3. **notes the reserve movements detailed in Appendix 6.**
4. **notes the Treasury Management Outturn report in Appendix 7.**
5. **notes the capital outturn position and financing arrangement in Appendix 8**

6. **notes the Council Tax and Business Rates collection performance in Appendix 9.**

7. **notes the Housing Revenue Account outturn position in Appendix 10.**

8. **notes the Housing Revenue Account Capital Programme detailed in Appendix 11.**

9. **notes the Section 106 monitoring information in Appendix 12.**

Recommendations: That Cabinet agrees and recommends to Council:

10. **approves the carry forward from 2025/26 into 2026/27 of Capital budgets as detailed in Appendix 8**

---

1. Implications

1.1 Financial, Property and Asset implications

The whole of this report is about ensuring that we provide detailed analysis of our revenue and capital income and expenditure for the financial year 2025/26 for both the General Fund and Housing Revenue account. Financial information is as detailed throughout the report.

Signed off by: Adele Taylor, Interim Director of Finance and Operations (Section 151 Officer) adele.taylor@cheltenham.gov.uk

1.2 Legal implications

As detailed in the body of the report, the Council has adopted and complied with the CIPFA Code of Practice for Treasury Management in the Public Services. This provides assurance that investments are, and will continue to be, within its legal powers.

Signed off by: One Legal, legalservices@onelegal.co.uk

1.3 Environmental and climate change implications

Key elements of the budget are aimed at delivering the corporate objectives in the Corporate Plan, including the climate change and net zero carbon priorities. The sustainability of general balances and earmarked reserves is vital to continue to work towards this objective.

Signed off by: Maizy McCann, Climate Officer maizy.mccan@cheltenham.gov.uk

1.4 **Corporate Plan Priorities**

The actions outlined in this outturn report to support general balances, implement savings and grow commercial income will help ensure that the Council can continue to deliver its corporate objectives as set out in the Corporate Plan 2025 - 2028.

Signed off by: Ann Wolstencroft, Director of Corporate Services ann.wolstencroft@cheltenham.gov.uk

---

2 Background

2.1. On 21 February 2025, Council approved the budget for 2025/26, including setting the Council Tax. This was the resources required to deliver the Council's identified objectives in it's Corporate Plan 2025-2028. This covered revenue and capital expenditure for both the General Fund budget and also the Housing Revenue Account (HRA). A revised budget for 2025/26 was then identified and approved at Full Council on 27 February 2026. This report details our performance against that revised budget.

2.2. In accordance with financial rule A11.3, the Section 151 Officer is responsible for providing regular reports to the Cabinet on the Councils finance and financial performance and this has been complied with throughout the year. This is the outturn report and information contained within has been used to prepare the Council's Statement of Accounts for 2025/26 which are now subject to external audit.

2.3. These are unprecedented times for local government alongside many of our residents and businesses within our town. We are facing rising service delivery costs and the challenge of supporting a growing number of residents affected by the cost-of-living crisis. These pressures come on top of nearly a decade of year-on-year cuts to the Council's government funding.

2.4. After a period of financial instability in 2022/23 and 2023/24, partly due to the continued impact of the global pandemic that started in 2020 which had long-lasting impacts on some of our income and expenditure, we began to see a stabilisation of our financial position. 2024/25 and 2025/26 have seen a need to continue to rely on usage of general fund balances, but for both financial years a small underspend has been reported at year end. This indicates that the general fund is starting to stabilise although there is further work that needs to be done to ensure that future years savings are identified and delivered and ensure that planned contributions are made.

2.5. This report draws together the financial outturn position for 2025/26 for the General Fund against the Revised 205/26 budget. It also summarises the Housing Revenue Account (HRA) revenue and capital budgets, details reserve movements and summarises requests for carry forward of budgets approved by the Section 151 Officer under delegated powers.

2.6. This report also provides explanations for more significant variances and provides an assessment of the potential ongoing impacts into 2026/27 and future financial years.

2.7. Finally, this report also ensures that the requirement of the Council's Treasury Management Policy to report on treasury management activities and treasury management indicators for the previous financial year by 30 September has been complied with.

3 General Fund Outturn 2025/26 (Appendix 2, 3, 4, 5 and 6)

3.1 The outturn position as at 31 March 2026 is an underspend of £16,159 against the revised budget approved in February 2026. A summary of the General Fund outturn position by directorate is contained in Appendix 2 and by service area in Appendix 3. Information is presented in the same format as used in the draft statement of accounts, in accordance with the CIPFA Code of Practice 2025/26.

3.2 It should be noted that this outturn performance forms the basis of our Statement of Accounts, which are currently subject to external audit. If this position changes following that audit, we will ensure that this is reported at the first available opportunity as part of our regular, ongoing financial management reporting to cabinet and full council.

3.3 In Appendix 4, there is a more detailed explanation of any variances over £50k. This includes overspends, underspends and variances on expected income levels. It is important to note, that whilst the £50k threshold has been identified, the percentage variance has also been included to give an indication on the proportionality of the variance when considered against the overall budget for that area. All variances, including those detailed here, will be considered for their ongoing impact into the new financial year and beyond and relevant action taken to either mitigate pressures, or identify areas where reduced expenditure or increased income could continue. This is an important part of our identification of savings for 2026/27 and we will report on this in the first quarterly report at cabinet in September 2026.

3.4 As part of the overall year end position, a total of £379k of carry forward requests have been identified. Appendix 5 provides details for each of these requests. The most significant of these relates to Homelessness services, at £310k, whereby grant funding received in 2025/26 has been ringfenced to contribute to services being re-procured in 2026/27. The other carry forward requests relate to areas where commitments have been made in 2025/26 and either not yet invoiced or have slipped into the new financial years. They also include amounts of grant funding which have been allocated but not yet taken up by their intended beneficiaries.

3.5 These have been reviewed by the Executive Leadership Team and approved by the Section 151 Officer under delegated powers (financial rule B10.1). A transfer has been made to a carry forward reserve in 2025/26 before appropriate transfers are made to the relevant cost centres in 2026/27 for budget managers to have clarity over their total in-year resources.

3.6 The general balance at 31 March 2025 is £1.459m which is just below the optimum level assessed by the Section 151 Officer in the Section 25 report to Council in February 2026 of £1.5m. The medium-term financial strategy approved by Council in February 2026 outlines the strategy for recovering this position. Appendix 6 shows the movement in the reserves for both Earmarked reserves and also the General Fund balance.

3.7 Earmarked Reserves have increased by £2.1m during 2025/26 of which £1.336m relates to adjustments required at year end. This includes the £379k of carry forward requests highlighted in paragraph 3.4.

3.8 During the review of the outturn position two significant additions to the Earmarked reserves were identified, to ensure that resources are available in the correct year. The largest of these relates to £600k added to the Business Rates Equalisation Reserve to recognise the cashflow impact of business rate changes. This recognises that additional revenues received in 2025/26 will need to be paid out in future financial years, and is therefore ensuring that cashflows are properly accounted for. £224k has also been added to the Environmental Services reserve due to a timing difference around when fleet will be required to deliver the service. There are other small movements totalling £133k.

4 Treasury Management Outturn (Appendix 7)

4.1. Treasury Management in Local Government is governed by the CIPFA Code of Practice on Treasury Management in the Public Services. This Council has adopted the code and complies with its requirements, one of which is the receipt by Cabinet and Council of an Annual Review Report after the financial year end. The detailed treasury report is attached at Appendix 7.

5 Capital Outturn and Financing (Appendix 8)

5.1. The outturn position in respect of General Fund capital programme is contained in Appendix 8. This provides information for individual schemes and Members are asked to note the outturn position, and where there is slippage Full Council are asked to approve the budgets to be carried forward into 2026/27.

5.2. It should be noted that in the first quarterly budget management report in September 2026 a review of the whole Capital programme will be undertaken as part of the work to consider in-year savings for 2026/27 and future financial years.

6 Collection Fund Performance (Appendix 9)

6.1. The monitoring report for the collection of council tax and business rates (NNDR) income is shown in Appendix 9. This shows the position at the end of March 2026. The collection rate for council tax has decreased very slightly from 98.18% in 2024/25 to 98.01% in 2024/25. The cost of living crisis continues to have an impact on households and our team are continuing to work with any customers who are struggling to pay. The collection rate is well above the national average at 95.62% for all Councils.

6.2. The collection rate for business rates collection has also decreased from 97.64% to 97.19% in the same period. This is again well above the national average of 96.77% for all English Councils and this remains an area of challenge given the national economic challenges. In 2026/27 there has been a rest of business rate values by the Valuation Office and significant changes in the rates being applied to local businesses so we expect this to remain an area of significant challenge going forwards.

7 Housing Revenue Account Outturn (Appendix 10 and 11)

7.1 Appendix 10 and 11 provide more detailed information about the ring-fenced Housing Revenue Account (HRA). These provide information on the HRA Operating Account for 2025/26 and also the summary information on the Capital programme.

7.2 The overall surplus for 2025/26 is £141k which is an improvement of £11k on the revised budget that was set in February 2026. This means that the overall HRA reserves now stand at £789k which is an improvement on the year end position from 2025/26 of almost £142k. This aligns with our strategy to build back the HRA reserves.

7.3 In summary we underspent on expenditure by £584k against the revised budget but also received £541k less income against the revised budget. There has been considerable work to identify savings within the HRA, particularly recognising the ability to be more efficient across the General Fund and the HRA now that the operations are delivered in house and reduce duplicated effort. There is a savings target within 2026/27 of £650k and a review of the outturn position will assist with identifying opportunities against this target.

7.4 The Capital programme has also underspent in year, £27.874m against a revised budget of £33.122m although this will be around timing and profile of spend on some of the major scheme delivery. This means that the HRA has benefitted from a reduction in revenue costs associated with borrowing required to fund the overall Capital programme.

7.5 In the budget that was agreed for the HRA in February 2026 for 2026/27 onwards, the focus remains on building back HRA reserves given the need to ensure ongoing investment in our housing stock.

8 Section 106 Monitoring (Appendix 12)

8.1 A position statement in regard to the activity of S106 receipts is contained in Appendix 12. This shows that at the start of the financial year we held £3.533m in S106 of which £1.034m has been applied to schemes throughout the year.

9 Key risks

9.1 The key risks are set out in Appendix 1.

Report authors:

Adele Taylor, Interim Director of Finance and Operations (S151 Officer)
adele.taylor@cheltenham.gov.uk

Jon Whitlock, Head of Finance (Deputy S151 Officer)
jon.whitlock@cheltenham.gov.uk

Appendices:

1. Risk Assessment
2. Summary General Fund Outturn 2025-26
3. Service Level General Fund Outturn 2025-26
4. Significant General Fund Variances 2025-26
5. General Fund Carry Forward Requests 2025-26
6. Reserve Movements 2025-26 & 2026-27
7. Treasury Management Outturn Report 2025-26
8. General Fund Capital Programme Outturn 2025-26 & Revised Programme 2026-27
9. Council Tax and NNDR Collection 2025-26
10. Housing Revenue Account Operating Account 2025-26
11. Housing Revenue Account Capital Programme 2025-26
12. Section 106 Monitoring 2025-26

Appendix 1: Risk Assessment

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
52	If the Council is unable to come up with long term solutions which close the gap in the medium term financial strategy then it will find it increasingly difficult to prepare budgets year on year without making unplanned cuts in service provision.	Cabinet	5	4	20	Reduce	- Commercial strategy & activities - Quarterly budget management reports - Cabinet engagement - budget proposals - Increased capacity in the finance team -Ongoing monitoring of targets for workstreams/services -Identification of 4 savings pillars that will be monitored and managed during 2026/27	Interim Director of Finance and Operations (S151)	Ongoing
403	Prioritisation of capital resources – If CBC are unable to prioritise medium term projects and programmes which require significant	Cabinet	5	4	20	Reduce	- Ongoing review and alignment of the capital programme with the Corporate Plan	Interim Director of Finance and Operations (S151)	Ongoing

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
	capital financing, then it will increasingly have to rely of borrowing to fund service investments increasing the pressure on our revenue budgets to fund repayments.						- Quarterly budget management reports - Cabinet engagement - budget proposals - Gateway reviews of all projects through the Corporate Programme office Business case and approval for all new projects, including allocation of resource and budgets		
53	If General Balances are not strengthened then insufficient reserves will be available to cover unanticipated spend or deficits resulting in the levels which will consequently fall below the minimum required level as recommended by the Section 151 Officer in the council's	Head of Finance (Deputy S151 Officer)	5	3	15	Reduce	The MTFS is clear about the need to enhance reserves and identifies a required reserves strategy for managing this issue. In preparing the budget for 2026/27 and in ongoing budget monitoring	Interim Director of Finance and Operations (S151)	Ongoing

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
	Medium Term Financial Strategy						and management,		

This page is intentionally left blank

APPENDIX 2: GENERAL FUND REVENUE OUTTURN 2025/26	A 2025/26 Revised Budget £	B 2025/26 Outturn per Ledger £	overspend / (underspend) before adjustments £	C Trf to / (from) Other Reserves Appendix 6 £	D C/F requests approved by S151 Officer Appendix 5 £	E Variance net of S151 c/f approvals £	F C/F requests to be approved Members Appendix 5 £	G Variance net of all c/f requests £
Chief Executive	3,255,018	3,334,197	79,179			79,179		79,179
Communities & Place Directorate	13,312,265	12,897,644	(414,621)	224,133	68,169	(122,319)		(122,319)
Finance, Assets & Regeneration Directorate	7,816,411	6,938,477	(877,934)	283,399	310,529	(284,006)		(284,006)
	24,383,694	23,170,318	(1,213,376)	507,532	378,698	(327,146)	0	(327,146)
Capital Charges	(3,865,790)	(3,823,135)	42,655			42,655		42,655
Interest and Investment Income	(1,709,465)	(1,592,178)	117,287			117,287		117,287
Use of balances and reserves - Appendix 6	903,407	903,407	0			0		0
NET BUDGET	19,711,846	18,658,412	(1,053,434)	507,532	378,698	(167,204)	0	(167,204)
Deduct:								
National Non-Domestic Rate	(2,633,807)	(3,144,998)	(511,191)	450,000				(61,191)
National Non-Domestic Rate - 2023/24-24/25 Deficits	966,162	966,162	0					0
National Non-Domestic Rates - S31 Grants	(4,043,950)	(3,991,191)	52,759					52,759
New Homes Bonus	(87,479)	(87,479)	0					0
Revenue Support Grant	(190,053)	(190,053)	0					0
Funding Guarantee	(756,789)	(756,790)	(1)					(1)
EPR Grants	(1,516,000)	(1,516,710)	(710)					(710)
NICs Grant	(219,405)	(219,405)	0					0
Council Tax (Surplus)/deficit	(98,051)	(98,051)	0					0
Other	(150,000)	10,189	160,189					160,189
NET SPEND FUNDED BY COUNCIL TAX	(10,880,964)	(10,880,965)	(1)					0
TOTAL INCOME	(19,610,336)	(19,909,291)	(298,955)	**NET OVER/(UNDER) SPEND AFTER APPLICATION OF RESERVES**				(16,159)
Net Transfer to/From General Balances	**101,510**	**(1,250,879)**	**(1,352,389)**					

KEY

A - Revised budget approved by Full Council in February 2026
B - Outturn net expenditure before year end adjustments
C - Operational transfers to / (from) reserves approved by the S151 officer under delegated powers - Appendix 6
D - Carry forward requests approved by the S151 Officer under delegated powers - Appendix 5
E - Net variance after adjustments in columns C to D
F - Carry forward requests requiring Member approval - Appendix 5
G - Net variance on cost centres taking into account all carry forward requests - see detail at Appendix 5

This page is intentionally left blank

APPENDIX 3 - GENERAL FUND REVENUE OUTTURN 2025/26

		Revised Budget 2025/26 £	Actual Spend 2025/26 £	(Under)/ Overspend 2025/26 £	Carry Forward Request £	Other Reserve Movements £	Adjusted (Under)/Overspend £	
111COR	Corporate Resources	810,412	868,803	58,391			58,391	*
112ICT	Information & Communications Technolog	599,007	565,619	(33,388)			(33,388)	
113SUP	Support Services	1,204,278	1,269,696	65,418			65,418	*
121DEMO	Democratic Services	641,321	630,080	(11,241)			(11,241)	
1CEXEC	**Chief Executive**	**3,255,018**	**3,334,197**	**79,179**	**0**	**0**	**79,179**	
211CC	Climate Change	160,990	148,237	(12,753)			(12,753)	
212PARKS	Parks, Gardens & Green Spaces	2,469,329	2,518,456	49,127			49,127	
213TOWN	Townscape	243,396	245,141	1,745			1,745	
214WRSC	Waste, Recycling & Street Cleaning	6,455,164	6,210,262	(244,902)	33,819	224,133	13,050	
221COMMS	Communications & Marketing	223,660	277,990	54,330			54,330	*
231BUSSUP	Business Support & Customer Services	884,134	926,197	42,063			42,063	
232LIFE	Lifelines	(40,480)	(51,174)	(10,694)			(10,694)	
233PEST	Pest Control	(86,308)	(114,094)	(27,786)			(27,786)	
234LAND	Land Charges	(94,730)	(81,321)	13,409			13,409	
241CWP	Communities, Wellbeing & Partnerships	783,250	756,228	(27,022)	34,350		7,328	
242MARK	Marketing & Inward Investment	318,831	301,665	(17,166)			(17,166)	
243PLAN	Planning & Enforcement	828,674	628,057	(200,617)			(200,617)	*
251EMP	Emergency Planning	11,150	12,771	1,621			1,621	
252LIC	Licensing	(87,767)	(116,752)	(28,985)			(28,985)	
253PSH	Private Sector Housing	196,229	208,483	12,254			12,254	
254COMF	COMF	0	0	0			0	
255ENVH	Enviromental Health	1,046,743	1,027,499	(19,244)			(19,244)	
2COMMPL	**Communities & Place**	**13,312,265**	**12,897,644**	**(414,621)**	**68,169**	**224,133**	**(122,319)**	
311BER	Bereavement Services	(751,556)	(726,266)	25,290			25,290	
312ROY	Royal Well	49,924	46,396	(3,528)			(3,528)	
313COMM	Commercial & Income Generation	277,070	226,042	(51,028)			(51,028)	*
314LEG	Legal	568,900	598,583	29,683			29,683	
321ELEC	Elections & Electorial Registration	310,078	288,696	(21,382)			(21,382)	
331CFUAUD	CFY & Audit	211,695	214,910	3,215			3,215	
332FIN	Finance	2,870,996	2,865,124	(5,872)			(5,872)	
333PROP	Property & Assets	5,788,571	5,872,416	83,845			83,845	*
341HOUS	Housing & Communities	548,265	18,109	(530,156)	310,529		(219,627)	*
352GOLD	Major Dev and Building Control	(502,005)	(514,062)	(12,057)		58,399	46,342	
361BRCTAX	Business Rates & Council Tax	605,226	622,666	17,440			17,440	
362CARP	Car Parking	(2,866,815)	(3,205,867)	(339,052)		150,000	(189,052)	*
363HOUBEN	Housing Benefits	706,062	631,729	(74,333)		75,000	667	
3FINAR	**Finance, Assets & Regeneration**	**7,816,411**	**6,938,477**	**(877,934)**	**310,529**	**283,399**	**(284,006)**	
91COR	Capital Charges	(3,865,790)	(3,823,135)	42,655			42,655	
92COR	Interest and Investment Income	(1,709,465)	(1,592,178)	117,287			117,287	*
93COR	Use of balances and reserves	903,407	903,407	0			0	
99COR	Funding	(19,610,336)	(19,909,291)	(298,955)		450,000	151,046	*
	Net Outturn Position	**101,510**	**(1,250,880)**	**(1,352,390)**	**378,698**	**957,532**	**(16,159)**	

*Significant Variences over £50k after carry forwards are explained in Appendix 4

Appendix 4 - Significant Variances 2025/26

Ref	Over/(under)spend after transfers to/(from) reserves £	Revised Budget 2025/26	Percentage Over/(Under) spend	Service Area	Budget Holder	Explanation
Chief Executive Directorate						
CE1	58,391	810,412	7.21%	Corporate Resources	Ann Wolstencroft	This service area is reporting an overspend of £58,391. Of this, £50,000 relates to a review of the allocation of costs shared between the General Fund and the Housing Revenue Account (HRA), resulting in a greater proportion of costs being held within the General Fund. The service area contains all Director costs and a range of corporate overheads, including corporate subscriptions, professional fees, audit fees and other central corporate expenditure. The remaining variance reflects other minor pressures across these corporate cost areas during the year.
CE2	65,418	1,204,278	5.43%	Support Services	Ann Wolstencroft	This service area is reporting an overspend of £65,418. Of this, £60,000 is primarily due to increased staffing costs within the Health and Safety team, reflecting additional resource requirements to support the Council's health and safety responsibilities and compliance obligations.
Communities and Place Directorate						
CP1	54,330	223,660	24.29%	Communications & Marketing	Katie Sandey	The Communications and Marketing service area is reporting an overspend as a result of changes to the allocation of costs shared between the General Fund and the Housing Revenue Account (HRA). The recharge methodology has been reviewed based on service activity during 2025/26 to better reflect the level of support provided to each area. As a result, a lower proportion of costs are now being recharged to the HRA, with a greater share being held within the General Fund.
CP2	-200,617	828,674	-24.21%	Planning & Enforcement	Chris Gomm	The Planning service area is reporting an underspend of £200,617. This variance is primarily due to higher-than-anticipated planning fee income, with a significant level of income received during Quarter 4 of the financial year. Due to the timing and unpredictable nature of planning applications, it can be difficult to accurately forecast both the value of income and the financial year in which it will be received.
Finance, Assets & Regeneration Directorate						
FAR1	-51,028	277,070	-18.42%	Commercial & Income Generation	Sanjay Mistry	The Commercial and Income Generation service area is reporting an underspend of £51,028 as a result of changes to the allocation of costs shared between the General Fund and the Housing Revenue Account (HRA).. The service is responsible for the development and maintenance of the Council's in-house Netcall system, together with the management and support of the corporate cash receipting system, both of which are utilised by HRA services as well as the General Fund. As a result, a greater proportion of costs are now being recharged to the HRA. This revised approach represents a fairer and more appropriate allocation of costs between the General Fund and the HRA, based on actual service usage and the benefits derived during the year.
FAR2	83,845	5,788,571	1.45%	Property & Assets	Louise Eite & Richard King	The Property and Assets service area is reporting an overspend of £83,845. This variance is primarily due to an overspend of £110,000 utility costs across the Council's operational assets, together with overspends on property management staffing costs andf legal costs associated with the planned sale of assets. These pressures have been partially offset by an underspend of £120,000 following the opening of Minster Exchange and the inclusion of the associated Minimum Revenue Provision (MRP) costs within the base budget. The remaining variance relates to a number of smaller underspends across the service area
FAR3	-219,627	548,265	-40.06%	Housing & Communities	Martin Stacy	Housing & Communities received homelessness grant funding of £1,016k for the 2025/26 financial year (this includes an additional 'windfall' payment of £76k received in the final quarter of 2025/26). The grant funding conditions mean that part of the work required was already funded by our base budget. Whilst this grant funding increased by £405k in 2025/26 we already anticipated changes in the funding formula for 2026/27 onwards. In particular, from 26/27 Cheltenham will be required to make a direct contribution to the provision of county-wide rough sleeping services from its homelessness prevention grant of up to around £425k, whereas for 2025/26 and in previous years these costs were met from a separate pot of grant funding. Our approach for 2025/26 means that approximately £220k of the 2025/26 grant will be available to support general balances within the Housing Options Service at year end, whilst ensuring that Cheltenham can meet all of its rough sleeping commissioning commitments for 26/27 without adversely affecting general balances.
FAR4	-189,052	-2,866,815	-6.59%	Car Parking	Jayne Gilpin	The Car Parking service area is reporting an underspend as a result of strong income performance and cost savings achieved during the year. Car parking fee income remained robust throughout 2025/26 and was £113,000 higher than forecast at the re-budget stage, reflecting continued demand across the Council's car parking facilities. In addition, the service achieved a number of expenditure savings, most notably a £67,000 saving on service charges at Regent Arcade Car Park.
Interest, Investment Income						
INT1	117,287	-1,709,465	6.86%	Interest and Investment Income	Jon Whitlock	The Interest and Investment Income service area is reporting an overspend of £117,287. This variance is primarily due to a £224,000 reduction in recharges to the Housing Revenue Account (HRA) as a result of slippage within the HRA capital programme during 2025/26, leading to a lower recovery of debt financing costs from the HRA. This pressure has been partially offset by additional investment income of £52,000, reflecting higher balances held in investment accounts during the year, and an additional £55,000 surplus from the investment property portfolio, driven by a reduction in property vacancies and improved rental occupancy levels.
Funding						
FUN1	151,046	-19,610,335	0.77%	Funding	Jon Whitlock	Funding is reporting an adverse variance of £151,046. Of this, £150,000 relates to a planned contribution from a small percentage of capital receipts generated during the year. Due to the timing of capital receipts being received and the conditions required for this contribution to be applied, the anticipated funding could not be recognised in 2025/26.

This page is intentionally left blank

Appendix 5: 2025/26 CARRY FORWARD REQUESTS

Ref	Amount £ (Net of VAT)	Service Area	Reason for carry forward	Service Manager	A (i) Base Budgets Amounts agreed by S151 Officer under delegated powers	A (ii) One-Off Budgets Amounts agreed by S151 Officer under delegated powers	B Amounts for member approval
1	310,529	Homelessness	During 26-27, the Council will be seeking approval to re-procure our Advice & Inclusion Service, currently provided by Citizens' Advice. This service includes debt advice, welfare benefits advice, financial inclusion support, and housing rights advice. The estimated annual cost of this service is likely to increase by about £50k/year (after taking account of changes in CPI). Homelessness Prevention Grant (HPG) conditions means that this must be ringfenced for homelessness prevention services and statutory homelessness costs. The advice service is an early intervention homelessness prevention initiative, and therefore falls within the HPG grant conditions. It is therefore proposed that this funding is now ringfenced to contribute towards the increase in the cost of the Advice and Inclusion Service over the period of the future contract. This will help to ensure that any agreed uplift to the value of the contract has minimal impact on the General Fund.	Martin Stacey		310,529	
2	33,819	Street Cleansing	A carry forward of £33,819 to be used to fund the replacement and installation of new litter bins across the borough. The funding will be met from the underspend achieved within the Street Cleaning service during 2025/26. Carrying this budget forward will enable the Council to continue its investment in the street scene environment, improving the quality and capacity of litter bin provision in key locations.	Karen Watson		33,819	
3	19,350	Community Grants	A carry forward of £23,325 to enable the Council to honour commitments made through the 2025/26 Community Pride Grant programme. Grant awards were approved on 3 February 2026 and formal grant agreements have subsequently been entered into with successful applicants from 2025/26 grant monies. Whilst the Community Pride Grant programme would ordinarily be delivered during the spring, the 2025/26 programme timetable was amended to allow the Neighbourhood Community Infrastructure Levy (CIL) grant round to be undertaken during Spring 2025. As a result, the Community Pride Grant programme was moved to the autumn, with applications opening at the end of September and closing on 10 November 2025. This revised timetable resulted in grant awards being approved later in the financial year than is normally the case. Approval of this carry forward request will ensure that sufficient budget remains available in 2026/27 to meet these commitments and fulfil the grant agreements already entered into with successful Community Pride Grant recipients.	Richard Gibson		19,350	
4	4,000	Community Grants	As above	Richard Gibson		4,000	
5	11,000	Leisure & Culture Services	A carry forward of £11,000 to support the ongoing Leisure and Culture Contract Project. The original growth allocation was approved to support the future procurement of the Council's leisure and culture services and comprised funding for both an options appraisal of the leisure centre and Prince of Wales Stadium, and the development of a procurement strategy. The options appraisal was completed during the previous financial year at a cost of approximately £24,000. However, the procurement strategy element of the project was not progressed during 2025/26, resulting in an unspent balance of £11,000 which will be used to support the next phase of this proeject during 2026/27	Richard Gibson		11,000	
	378,698	**TOTAL CARRY FORWARD REQUESTS**			**-**	**378,698**	**-**

This page is intentionally left blank

Appendix 6 - Outturn Reserve Movements 2025/26 & 2026/27

			2025/26 1st April 2025 £	2025/26 Movement Revenue £	2025/26 Movement Capital £	2025/26 Revised Budget Changes £	2025/26 Outturn Changes £	2025/26 31st March 2026 £	2026/27 Movement Revenue £	2026/27 Movement Capital £	2026/27 Outturn Changes £	2026/27 31st March 2027 £
	EARMARKED RESERVES **Other**	**Purpose of Reserve**										
RES002	Pension & Restructuring Reserve	To fund future reorganisational changes	**(157,761)**	(50,000)				**(207,761)**	207,761			**(0)**
RES008	House Survey Reserve	To fund cyclical housing stock condition surveys	**(5,617)**					**(5,617)**	5,617			**0**
RES009	Twinning Reserve	Twinning towns civic visits to Cheltenham	**(8,366)**					**(8,366)**	8,366			**0**
RES010	Flood Alleviation Reserve	To fund future flood resilience work, delegated to the Flood working group for allocation	**(235,959)**					**(235,959)**	235,959			**(0)**
RES016	Joint Core Strategy Reserve	To fund Joint Core Strategy	**(41,780)**					**(41,780)**	41,780			**0**
RES020	Enviromental Services Reserve	To fund environmental services provided by Ubico	**0**	(255,000)			(224,133)	**(479,133)**				**(479,133)**
RES022	Homelessness Reserve	To cover future homelessness prevention costs	**(41,100)**					**(41,100)**	41,100			**0**
RES023	Transport Green Initiatives Reserve	To fund Transport Green Initiative Schemes	**(33,825)**					**(33,825)**				**(33,825)**
RES024	Transformation & Change	To fund the transformation & change	**(127,059)**	22,915				**(104,144)**	(895,856)			**(1,000,000)**
RES025	Budget Strategy (Support) Reserve	To support budget strategy	**(9,452)**			(153,000)		**(162,452)**	(162,000)			**(324,452)**
RES026	Social Housing Marketing Assessment (SHMA) Reserve	To fund Social Housing Marketing Assessment work	**(49,034)**	(2,500)				**(51,534)**	51,534			**0**
RES030	Major Developments Reserve	To fund major Developments	**(334,937)**	(200,000)			(38,549)	**(573,486)**				**(573,486)**
RES208			**0**				(19,850)	**(19,850)**				**(19,850)**
			(1,044,890)					**(1,965,007)**				**(2,430,746)**
	Repairs & Renewals Reserves											
RES201	Commuted Maintenance Reserve	Developer contributions to fund maintenance	**(12,175)**	12,172				**(3)**	3			**(0)**
RES204	I.T. Repairs & Renewals Reserve	Replacement fund	**(32,037)**		32,037			**0**	(117,963)			**(117,963)**
RES205	Property Repairs & Renewals Reserve	20 year maintenance fund	**(168,000)**	102,000				**(66,000)**	66,000			**0**
RES206	Delta Place Reserve	maintenance fund	**(274,226)**	(50,000)				**(324,226)**				**(324,226)**
			(486,438)					**(390,229)**				**(442,189)**
	Equalisation Reserves											
RES029	Council Tax Appeals Equalisation Reserve	To fund fluctuations in overpayment of court costs	**(53,926)**					**(53,926)**	53,926			**0**
RES101	Housing Benefit Audit	To pay for Housing Benefit audits that are due	**0**				(75,000)	**(75,000)**				**(75,000)**
RES102	Planning Appeals Equalisation	Funding for one off appeals cost in excess of revenue budget	**(76,612)**					**(76,612)**	76,612			**(0)**
RES105	Local Plan Equalisation	Fund cyclical cost of local plan inquiry	**(8,095)**					**(8,095)**				**(8,095)**
RES106	Elections Equalisation	Fund cyclical cost of local elections	**(95,832)**	(65,000)				**(160,832)**	160,832			**0**
RES107	Car Parking Equalisation	To fund fluctuations in income from closure of car parks	**(100,000)**					**(100,000)**	100,000			**0**
RES108	Business Rates Retention Equalisation	To fund fluctuations in income from retained business rates	**(571,015)**	(253,985)		(233,541)	(600,000)	**(1,658,541)**	558,541			**(1,100,000)**
RES109	Cemetery income Equalisation reserve	Additional Crematoria income to 2nd chapel build scheme	**(50,000)**					**(50,000)**	50,000			**0**
RES112	Legal Services Equalisation	To fund one-off legal Expenditure	**(600,000)**		24,575			**(575,425)**				**(575,425)**
			(1,555,480)					**(2,758,431)**				**(1,758,520)**
	Reserves for commitments											
RES301	Carry Forwards Reserve	Approved budget carry forwards	**(422,532)**	422,532			(378,698)	**(378,698)**			378,698	**0**
	CAPITAL											
RES402	Capital Reserve - GF	To fund General Fund capital expenditure	**0**	(200,000)				**(200,000)**	200,000			**0**
	TOTAL EARMARKED RESERVES		**(3,509,341)**					**(5,692,366)**				**(4,631,456)**
	GENERAL FUND BALANCE											
B8000 - B8240	General Balance - RR	General balances	**(1,544,483)**	(560,803)		662,313	(16,159)	**(1,459,131)**	(315,988)			**(1,775,119)**
			(1,544,483)					**(1,459,131)**				**(1,775,119)**
	TOTAL GENERAL FUND RESERVES AND BALANCES		**(5,053,824)**	**(1,077,669)**	**56,612**	**275,772**	**(1,352,389)**	**(7,151,497)**	**366,224**	**0**	**378,698**	**(6,406,575)**

This page is intentionally left blank

Treasury Management Outturn Report 2025/26

1. Introduction

1.1 In February 2011 this Council adopted the Chartered Institute of Public Finance and Accountancy's *Treasury Management in the Public Services: Code of Practice* (the CIPFA Code) which requires the Authority to approve a treasury management annual report after the end of each financial year.

1.2 The financial year was largely dominated by two periods of significant uncertainty and volatility. The first being the US trade tariff 'Liberation Day' in April 2025 and the second was the US/Israel war with Iran at the end of February 2026.

1.3 After the initial fallout from US trade tariffs, the following months saw some improvements as equity markets made gains and bond yields eased modestly. However, in the UK this trend in bond yields reversed somewhat as an uncertain economic outlook together with concerns around the government's fiscal position and autumn Budget saw 'term premia' rise as investors demanded a higher return for holding gilts. This impacted significantly the borrowing rates offered from the PWLB, making it very expensive to borrow.

1.4 Having begun the financial year at 4.50%, the Bank of England's Monetary Policy Committee (MPC) reduced Bank Rate by 0.75% to 3.75% by the close of March 2026.

2. Main Points

2.1 Investment and borrowing interest for 2025/26 have produced a net deficit of £172k against the revised budget. Borrowing rates in the local authority increased significantly in the last quarter of 25/26, but due to the US/Iran war, investment rates remained higher than estimated for the last quarter of the financial year as further rate reductions were forecast at the revised budget time in January 2025.The HRA capital expenditure was well below estimated spend and this resulted in less debt recharged to the HRA for 2025/26.

2.2 Pooled Funds have returned dividends that were budgeted at the start of the financial year starting against lower capital values, returned 4.36% against the £7m invested, resulting in over £305k received.

2.3 The capital values of the Pooled Funds realised gains of over £15k for 2025/26.

2.4 The Council had debt of £217.435m as of 31st March 2026 at an average rate of 3.86%.

2.5 Investments returned an average rate of 4.27% on an average £17.970m for 2025/26 on

2.5 All treasury prudential indicators were within their permitted limits for 2025/26.

3. Local Context

3.1 On 31st March 2026, the Authority had net borrowing of £199.200 arising from its revenue and capital expenditure, an increase on 2025/26 of £12.480m. The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while usable reserves and working capital are the underlying resources available for investment.

3.2 The Council's strategy was to maintain borrowing and investments below their underlying levels, sometimes known as internal borrowing, to reduce risk and keep interest costs low. The treasury management position as of 31st March 2026 and the year-on-year change is shown in table 1 below.

Table 1: Balance Sheet Summary

	31.3.25 Actual £m	31.3.26 Actual £m
General Fund CFR	120.328	119.942
HRA CFR	95.512	109.435
Total CFR	**215.840**	**229.377**
External borrowing	204.409	217.435
Internal (over) borrowing	11.440	11.950
Less: Balance sheet resources	19.375	18.240
Net borrowing	**186.720**	**199.200**

3.4 The treasury management position as 31st March 2026 and the change during the year is shown in table 2 below.

Table 2: Treasury Management Summary

	31.3.25 Balance £m	2025/26 Movement £m	31.3.26 Balance £m	31.3.26 Rate %
Long-term borrowing Short-term borrowing	151.359 53.050	(8.430) 21.450	142.930 74.500	3.40 5.10
Total borrowing	**204.409**	**13.020**	**217.430**	**3.86**
Long-term investments Short-term investments Cash and cash equivalents	17.693 0 0	0.542 0 0	18.235 0 0	4.27 - -
Total investments	**17.693**	**0.542**	**18.235**	**4.27**
Net borrowing	**186.720**	**12.480**	**199.200**	

3.5 Borrowing Activity as of 31st March 2026, the Council held £217.435m of loans, an increase of £13.020m on the previous year. All new borrowing undertaken in 2025/26 was temporarily from the LA market, since PWLB rates were much higher as they were affected by higher gilt rates. As outlined in the treasury strategy, the Council's chief objective when borrowing has been to strike an appropriate risk balance between securing lower interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Council's long-term plans change being a secondary objective. The Council's borrowing strategy continues to address the key issue of affordability without compromising the longer-term stability of the debt portfolio.

3.6 In May 2025, the one remaining LOBO loan (Lenders Option, Borrowers Option) the Council had with Bayerische Landesbank, was repaid in full as the lender exercised their right to increase the loan rate from 3.95% to 7%. It was decided to repay the loan after seeking advice from Arlingclose and replaced the loan with short term debt.

Table 3: Borrowing Position

	31.3.25 Balance £m	2025/26 Movement £m	31.3.26 Balance £m	31.3.26 Rate %
Public Works Loan Board	137.459	(3.430)	134.030	3.38
Banks (LOBO)	5.000	(5.000)	0	3.95
Banks (fixed term)	8.900		8.900	3.82
Local authorities (short-term)	53.050	21.450	74.500	5.10
Total borrowing	**204.409**	**13.020**	**217.430**	**3.86**

3.7 After cutting Bank Rate to 3.75% in December 2025, the BoE's Monetary Policy Committee (MPC) voted 5-4 to hold rates in February 2026 and then unanimously to do so again in March. Until the war started, financial markets were expecting Bank Rate to be cut to 3.5% at the March meeting. However, the conflict in the Middle East quickly changed this. The MPC noted the risks to both inflation and growth and indicated they could move rates either up or down depending on the conditions. Financial markets quickly responded to this by pricing in rate hikes.

3.8 The cost of short-term borrowing from other local authorities has generally tracked Base Rate at around 4%-4.5%. However, from late 2025 rates began to rise, peaking at around 7% in February and March 2026.

3.9 CIPFA's 2021 Prudential Code is clear that local authorities must not borrow to invest primarily for financial return and that it is not prudent for local authorities to make any investment or spending decision that will increase the capital financing requirement, and so may lead to new borrowing, unless directly and primarily related to the functions of the Council. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield unless these loans are for refinancing purposes.

3.10 The Council currently holds PWLB debt of £38.500m for commercial investments that were purchased prior to the change in the CIPFA Prudential Code.

4. Investment Activity

4.1 The Council holds invested funds, representing income received in advance of expenditure plus balances and reserves held. During 2025/26 the Council's investment balance ranged between £16m and £36.2m due to timing differences between income and expenditure. The year-end investment position and the year-on-year change is show in table 3 below.

Table 4: Investment Position (Treasury Investments)

	31.3.25 Balance £m	2025/26 Movement £m	31.3.26 Balance £m	Interest Rate %
Banks & Building Societies	0	0	0	-
Government (inc. Local Authorities)	0	0	0	-
MMF's/Call Accounts	0	0	0	-
Pooled Funds	7.000	0	7.000	4.36
Other Investments	10.693	0.550	11.235	4.69
Total Investments	**17.693**	**0.550**	**18.235**	**4.39**

4.2 £7m of the Council's investments are held in externally managed strategic pooled (bond, equity, multi-asset and property) funds where short-term security and liquidity are lesser considerations, and the objectives instead are regular revenue income and long-term price stability. These funds generated a total return of £305k (4.36%), with the capital value of these funds increased by £15k, which is treated as an unrealised capital gain. See table 4 below for a breakdown of the individual returns for each fund.

Table 5: Current Pooled Funds

Fund Manager	Investment	Capital Value as at 31st March 2025	Capital Value as at 31st March 2026	Dividends Received 2025/26	2025/26 Gain/(Loss)	Gain/(Loss) v Original Investment
	£	£	£	£	£	£
CCLA Property Fund	3,000,000	2,649,166	2,648,975	123,558	(191)	(351,025)
Schroders Income Maximiser Fund	2,000,000	1,640,687	1,762,194	125,024	121,507	(237,806)
CCLA Diversified Income Fund	2,000,000	1,870,964	1,764,380	56,622	(106,584)	(235,620)
Total –current Funds	**7,000,000**	**6,160,816**	**6,175,549**	**305,204**	**14,732**	**(824,451)**

4.5 The nature of these funds is that values can fluctuate from one year to another. Their performance and suitability in meeting the Council's investment objectives are monitored and discussed with Arlingclose on a regular basis. Because these funds have no defined maturity date, but are available for withdrawal after a notice period, their performance and continued suitability in meeting the Council's investment objectives are regularly reviewed. Strategic fund investments are made in the knowledge that capital values will move both up and down on months, quarters and even years; but with the confidence that over a long period total return will exceed cash interest rates.

5. Financial Implications

5.1 The outturn for debt interest paid in 2025/26 was £7.538 million (3.7%) on an average debt portfolio of £203.728 million against a budgeted £7.479 million. A deficit of £53k was recorded for the financial year after considering the re-imbursement of £3.718m for the debt associated to the HRA for 2025/26. The reason for the variance is mainly due to the higher rates available towards the back end of the financial year added with additional borrowing to cover the daily cashflow.

5.2 The outturn for investment income received in 2025/26 was £1.496m which equates to a 4.62% return (24/25 – 4.92%) on an average investment portfolio of £22.410 million against a budgeted £1.444m. The General Fund reimbursed the HRA £28k for revenue balances held within investment balances during 2025/26. A General Fund surplus of £52k was made on investment income. The council were able to hold higher balances within the MMF's for longer periods which resulted in better interest returns, and due to the HRA Reserves being lower than expected, resulted in less interest being re-paid to the HRA.

5.3 Net loans and investments budget for 2025/26 which also includes leasing and third-party loans repayments, was a budgeted cost of £2.323m but made an actual cost return of £2.324, a deficit of £1k. See table 6 below for a breakdown.

Table 6 – Borrowing and Investment Costs

Borrowing Costs	2025/26 Revised £	2025/26 Actual £	Variance (surplus)/loss £
Temp Borrowing	2,515,788	2,576,330	60,542
LT Borrowing	4,963,145	4,961,759	(1,386)
HRA Share	(3,711,500)	(3,546,209)	165,291
Total GF Cost	**3,767,433**	**3,991,880**	**224,447**
Investment Income	2025/26 Revised £	2025/26 Actual £	Variance (surplus)/loss £
Pooled Funds	312,000	305,204	6,796
Short term/call	378,678	400,360	(21,682)
Other Loans/Lease	820,327	818,798	1,529
HRA Share	(67,000)	(28,283)	(38,717)
Total GF Income	**1,444,005**	**1,496,079**	**(52,074)**
NET COST (Saving)	**2,323,428**	**2,495,801**	**172,373**

6. Compliance Report

6.1 The Council can confirm that it has complied with its Prudential Indicators for 2025/26, which was set in March 2025 as part of the Council's Treasury Management Strategy and Capital Strategy. In compliance with the requirements of the CIPFA Code of Practice this report provides members with a summary report of the treasury management activity during 2025/26. None of the Prudential Indicators have been breached and a prudent approach has been taking in relation to investment activity with priority being given to security and liquidity over yield.

The Prudential Indicators include:

- Authorised and Operational Boundary for External Debt
- Average Credit rating
- Upper limits for fixed interest rate exposure and variable interest rate exposure
- Upper limit for total principal sums invested over 364 days.

Table 7: Debt Limits

	2025/26 Maximum £m	31.3.26 Actual £m	2025/26 Operational Boundary £m	2025/26 Authorised Limit £m	Complied
Borrowing	231.359	217.430	294	304	✓

6.2 Since the operational boundary is a management tool for in-year monitoring it is not significant if the operational boundary is breached on occasions due to variations in cash flow, and this is not counted as a compliance failure. Total debt was never above the operational boundary during 2025/26.

7. Treasury Management Indicators

The Authority measures and manages its exposures to treasury management risks using the following indicators.

7.1 **Maturity Structure of Borrowing**

This indicator is set to control the Council's exposure to refinancing risk. The upper and lower limits on the maturity structure of fixed rate borrowing were:

Table 8 Maturity structure of borrowing

	31.3.26 Actual	Actual Debt Due	Upper Limit	Lower Limit	Complied
Under 12 months	38%	£82.500m	50%	0%	✓
Over 12 months and within 5 years	28%	£61.597m	100%	0%	✓
5 years and within 10 years	5%	£10.617m	100%	0%	✓
10 years and above	29%	£62.720m	100%	0%	✓

Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment. The actual maturity percentages for 31st March 2026 are calculated on the debt outstanding of £217.430m.

7.2 Principal Sums Invested for Periods Longer than 364 days

The purpose of this indicator is to control the Authority's exposure to the risk of incurring losses by seeking early repayment of its investments. The limits on the long-term principal sum invested to final maturities beyond the period end were:

Table 9 Principal invested over 364 days

	2024/25	2025/26	2026/27
Actual principal invested beyond year end	7m	7m	7m
Limit on principal invested beyond year end	10m	10m	10m
Complied	✓	✓	✓

Code	Directorate / Scheme	Scheme Description	Budget 2025/26 £	Forecast 2025/26 £	Outturn 2025/26 £	Original Budget 2026/27 £	Adjusted Budget after Outturn 2026/27 £	Budget 2027/28 £	Budget 2028/29 £	Total Programme £
	Funded from Capital Receipts or Borrowing									
CAP014	Digital Platform for Cem & Crem	To develop a digital platform to replace the current records system used by Bereavement Services	-	5,539	5,539					
CAP015	Excavator Purchase	To purchase an excavator for the cemetery to deliver a revenue saving in the existing cost of hiring plant.	33,250	33,250	33,250					
CAP026	IT Infrastructure	5 year ICT infrastructure strategy	100,000	150,000	234,800	175,000	175,000	100,000	100,000	
CAP030	Carbon Neutral agenda	Seed funding to deliver the actions needed, as outlined in the report to Full Council in October 2019, to facilitate the Council's ambition to become carbon neutral by 2030.	68,691	-		68,691	68,691			
CAP035	Civic Events Space	Funding for an event space to become a potential Council Chamber and meeting space following the sale of the Municipal Office building.	500,000	-		500,000	500,000			
CAP036	Resurfacing of the Regent Arcade Car park	To meet the obligations of the lease, resurfacing of the car park.	13,379	- 4,103	13,379	17,482	-			
CAP037	Decarbonisation of Leisure@	To finance the investments in LED lighting and pool covers.	327,365	327,365	13,083		314,282			
CAP038	Fixed Power Installation in Festival Gardens	To deliver a fixed power supply and distribution in the Festival Gardens.	500,000	4,550	21,392	495,450	478,608			
CAP039	Recreation Centre Waterproofing	Waterproofing and propping scheme for at recreation centre.				141,000	141,000			
CAP102	Play Areas Enhancement	We are tendering one large playground improvement contract.	159,522	159,522	68,797	80,000	120,725	80,000	80,000	
CAP113	Desilting of Hatherley Lake		55,000		6,158	48,842	48,842			
CAP135	Commercialisation opportunities within the Cheltenham Trust	Invest a sum of £1m to pump prime the commercial opportunities identified by The Cheltenham Trust (including investment which both sustains and grows income at the Town Hall);	87,990	104,922	104,922		-			
CAP158	Pest Control Van Replacement	To replace one of the existing end of life vans with a more efficient model.	25,000	-			-			
CAP201	CCTV	Additional CCTV in order to improve shopping areas and reduce fear of crime	75,000	1,185	72,131	50,000	2,869	23,815		
CAP207	Public Realm Improvements - High Street Phase 2				49,619					
CAP209	Asset Management Strategy Implementation	To provide funding for the implementation of strategies to increase the profitability and longevity of our fixed assets.	100,000	-	112,562	100,000	100,000	100,000	100,000	
CAP223	H&S, vacant property & renovation grants				59,000					
CAP227	Housing Delivery	Enabling the delivery of Private Rented Sector (PRS) Housing.	4,500,000	-		4,500,000	4,500,000	4,500,000		
CAP229	Noise Monitoring Equipment	The replacement of two noise monitoring systems required for the Council to undertake it's statutory duty to survey noise.	24,000	24,000			24,000			
CAP301	Vehicles and recycling equipment and receptacles	Replacement vehicles and recycling equipment	4,803,523	4,086,709	3,331,260	2,050,100	2,805,549	675,000	74,500	
CAP306	In Cab Technology	The introduction of an In-Cab system would reduce the mileage required to be completed by Ubico, because it would guide the crew around their collection route and would largely eliminate mistakes.	20,000	20,000	37,842					
CAP501	Allotments	Allotment Enhancements - new toilets, path surfacing, fencing, signage, and other improvements to infra-structure.	154,608	20,000	3,014	134,608	151,594			
CAP513	Smart Working Project				118,837					
CAP515	Minster Innovation Exchange	20,000 sq ft purpose-built commercial space adjacent to the Minster	14,600	14,837	14,837					
CAP518	Sandford Park toilets	Provide for new public toilet provision at Sandford Park	150,000	-		150,000	150,000			
CAP516	Airport Loan Interest Capitalised				422,429					
CAP521	Montpellier Toilets Refurbishment				250					
CAP527	Delta Place Renovations				31,550	3,538,226	3,538,226			
CAP529	Floor strengthing work and survey at the Pittville Pump Rooms	To strengthen the sprung flooring and ensure the appropriate surveys can be carried out on the ceiling of the Pump Rooms	258,720	258,720	202,046		56,674			
CAP606	Crematorium Scheme - existing chapel	Redevelopment of existing chapel	50,000	50,000	16,603		33,397			
			12,020,648	**5,256,496**	**4,973,301**	**12,049,399**	**13,209,457**	**5,478,815**	**354,500**	**-**
	Funded From Levelling Up and Borrowing/Capital Receipts									
CAP402	National Cyber Innovation Centre Delivery	Delivery of the National Cyber Innovation Centre at Golden Valley.	28,643,752	430,012	430,012	32,848,023	32,848,023	65,696,047		
CAP402	Interest - National Cyber Innovation Centre Delivery	Interest costs for Delivery of the National Cyber Innovation Centre at Golden Valley.	-	6,050		440,000	440,000	2,322,000	-	
			28,643,752	**436,062**	**430,012**	**33,288,023**	**33,288,023**	**68,018,047**	**-**	**-**
	Funded from Capital Grants									
CAP034	UKSPF Projects				24,920					
CAP101	Play areas (Section 106)				11,194					
CAP107	Public Art				7,500					
CAP228	Housing Enabling	Expenditure in support of enabling the provision of new affordable housing in partnership with registered Social Landlords and the Homes and Communities Agency (HCA)	252,746	252,746						
			252,746	**252,746**	**43,614**	**-**	**-**	**-**	**-**	**-**
	Funded from Better Care Fund									
CAP221	Disabled Facilities Grants	County Council Grant funding for the provision of building work, equipment or modifying a dwelling to restore or enable independent living, privacy, confidence and dignity for individuals and their families.	500,000	1,225,902	961,362	500,000		500,000	500,000	
CAP224	Warm & Well	A Gloucestershire-wide project to promote home energy efficiency, particularly targeted at those with health problems	58,600	-	300,000	77,000		18,400	18,400	
CAP528	Chelt Lido - Solar Panel Grant				19,504					
			558,600	**1,225,902**	**1,280,866**	**577,000**	**-**	**518,400**	**518,400**	**-**
	TOTAL CAPITAL PROGRAMME		**41,475,746**	**7,171,206**	**6,727,793**	**45,914,422**	**46,497,480**	**74,015,262**	**872,900**	**-**

*A capital budget was also approved by Council on 21 July 2025, which was exempt due to the nature of the capital project.

This page is intentionally left blank

Council Tax and Business Rates
Collection Rates 2021-22

Appendix 9 - Council Tax and NNDR Collection 2025/26

Current Year Charges - 2025/26			
Monitoring Period	**% Collected at 31/03/2026**	**Target 31/03/2026**	The annual collection rate is just below the target. 98.01% of 2025/26 council tax collected within the financial year is still a very good result, especially in the backdrop of rising living costs. It is well above the national average for all England councils, which is 95.62%. The council tax team continue to work with those customers struggling to pay and where appropriate maximise entitlement to benefits or discounts. Robust recovery action will continue against those avoiding payment
	98.01%	98.20%	
Comparison with 2024/25	**As at 31/03/2025**		
	98.18%		

Previous Years Charges Outstanding in 2025/26			
Monitoring Period	**Amount outstanding at 31/03/2026**	**Target 31/03/2026**	The arrears outstanding at the end of 2025/26 have reduced by more than the target level. The council tax team continue to work closely with those customers struggling to pay and robust recovery action will continue against those avoiding payment
	£2,531,064	£2,700,000	
Comparison with 2024/25	**Amount outstanding at 31/03/2024**		
	£2,360,311		

Business Rates 2025/26

Current Year Charges - 2025/26			
Monitoring Period	**% Collected at 31/03/2026**	**Target 31/03/2026**	The annual collection rate is below the target. 97.19% of 2025/26 business rates collected within the financial year is still a very good result and is above the national verage for all England councils, whch is 96.77%. The business rates team continue to work with those business rate payers struggling to pay. Robust recovery action using all legal powers available will continue against those avoiding payment
	97.19%	**97.50%**	
Comparison with 2024/25	**As at 31/03/2024**		
	97.64%		

Previous Years Charges Outstanding in 2025/26			
Monitoring Period	**Amount outstanding at 31/03/2026**	**Target 31/03/2026**	The arrears outstanding at the end of 2025/26 have not quite reduced to the target level. The business rates team continue to work closely with businesses struggling to pay and robust available enforcemnt powers are being utilised against those businesses avoiding payment
	£1,231,182	**£1,200,000**	
Comparison with 2024/25	**Amount outstanding at 31/03/2024**		
	£595,851		

This page is intentionally left blank

Appendix 10

HRA OPERATING ACCOUNT

	2025/26		
	Original Budget	**Revised Budget**	**Outturn**
	£	**£**	**£**
EXPENDITURE			
General & Special Management	6,265,990	6,272,367	5,598,853
Supervision & Management	4,152,600	4,361,152	4,635,409
Rents, Rates, Taxes and Other Charges	158,900	222,400	353,279
Repairs & Maintenance	5,810,710	5,248,541	5,086,035
Provision for Bad Debts	250,000	250,000	153,920
Interest Payable	3,711,499	3,696,227	3,546,209
Depreciation of Dwellings	5,819,700	5,819,700	5,967,476
Depreciation of other Assets	315,200	315,200	339,922
Debt Management Expenses	116,000	116,000	97,452
Efficiency Savings	-650,000	-374,000	-374,000
Strategic management	874,200	874,200	813,083
TOTAL	**26,824,799**	**26,801,787**	**26,217,637**
INCOME			
Dwelling Rents	25,018,500	25,018,500	24,561,279
Non Dwelling Rents	273,200	288,476	257,124
Charges for Services and Facilities	1,276,300	1,287,000	1,215,071
Contributions towards Expenditure	278,300	278,300	297,549
TOTAL	**26,846,300**	**26,872,276**	**26,331,024**
NET INCOME FROM SERVICES	21,501	70,489	113,386
Interest Receivable	60,000	60,000	28,283
NET OPERATING SURPLUS	**81,501**	**130,489**	**141,669**
Net Increase/(Decrease) in reserves	81,501	130,489	141,669
Revenue Reserve brought forward	647,427	647,427	647,427
Revenue Reserve Carried Forward	**728,928**	**777,916**	**789,096**

This page is intentionally left blank

Appendix 11

HRA CAPITAL PROGRAMME

	2025/26 Forecast £	2025/26 Actual £
EXPENDITURE		
EXISTING STOCK		
Property Improvements & Major Repairs	16,106,000	14,857,521
Adaptions for the Disabled	1,000,000	701,017
Repurchase of Shared Ownership Dwellings	185,000	120,061
	17,291,000	**15,678,598**
NEW BUILD & ACQUISITIONS	15,831,000	12,195,929
TOTAL	**33,122,000**	**27,874,528**
FINANCING		
Capital Receipts	3,935,500	3,523,231
HRA Revenue Contribution	-	-
Leaseholder & Other Contributions	100,000	90,530
Major Repairs Reserve	6,134,900	6,248,576
Grants & Shared Ownership Sales	1,271,900	3,486,085
Borrowing	21,679,700	14,526,105
TOTAL	**33,122,000**	**27,874,528**

MAJOR REPAIRS RESERVE

	2025/26 Forecast £	2025/26 Actual £
Balance brought forward	-	-
Depreciation of Dwellings	5,819,700	5,967,476
Depreciation of Other Assets	315,200	339,922
	6,134,900	**6,307,398**
Utilised to fund Capital Programme	-6,134,900	-6,307,398
Balance carried forward	**-**	**-**

This page is intentionally left blank

APPENDIX 12: SECTION 106 STATEMENT 2025/26

Detail	Contributions	YEAR of receipt	Balance @ 1/4/25 £	Accounting Adjustment	Receipts/ Refunds in year £	Amounts Applied to fund Cap expend £	Transferred to Revenue £	Grants & Contributions @ 31/3/26 £
RECEIPTS IN ADVANCE								
Long Term								
DEV008	Newland Homes Prestbury Road - affordable housing	20/21	(1,637.20)			1,637.20		-
DEV009	Vistry Homes- Starvhall Farm-affordable homes	22/23	(2,184,947.30)			67,176.47		(2,117,770.83)
DEV010	Bromford Dev Ltd - Village Road	22/23	(5,000.00)					(5,000.00)
DEV011	Pate Court S106 Contribution	22/23	(397,995.61)			397,995.61		-
DEV012	Miller Homes re Shurdington Road	23/24	(4,000.00)					(4,000.00)
DEV013	Brookworth Homes Ltd - Parabola Rd development	23/24	(209,640.72)			209,640.72		-
B7410 CAPITAL			**(2,803,220.83)**		-	**676,450.00**	-	**(2,126,770.83)**
TOTAL GRANTS RECEIPTS IN ADVANCE			**(2,803,220.83)**	-	-	**676,450.00**	-	**(2,126,770.83)**
CAPITAL GRANTS UNAPPLIED								
SECTION 106								
Housing Enabling (affordable housing)								
DEV004	Pegasus Life - John Dower House	16/17	(468,550.00)			338,950.23		(129,599.77)
			(468,550.00)		-	**338,950.23**	-	**(129,599.77)**
Public Art								
DEV101	Dunalley St-Public Art	10/11	(3,299.47)					(3,299.47)
DEV106	12/13 Hatherley Lane (B&Q) - Public Art	12/13	(7,371.68)					(7,371.68)
DEV107	Devon Avenue - Public Art	12/13	(1,414.96)					(1,414.96)
DEV110	Spirax Sarco St Georges Road	13/14	(6,500.00)			6,500.00		-
DEV111	Public Art - Midwinter site	14/15	(50,000.00)			1,000.00		(49,000.00)
DEV112	Wayfinding - University Pittville Campus	14/15	(1,257.05)					(1,257.05)
DEV113	Taylors Yard, Gloucester Road - Public Art	17/18	(30,000.00)					(30,000.00)
			(99,843.16)		-	**7,500.00**	-	**(92,343.16)**
PlaySpaces								
DEV010	Bromford Dev Ltd - Village Road	23/24	(153,351.00)			11,194.32		(142,156.68)
			(153,351.00)		-	**11,194.32**	-	**(142,156.68)**
Other								
DEV302	Former Gas Club flood defence maintenance contribution	18/19	(8,000.00)		-			(8,000.00)
			(8,000.00)		-	-	-	**(8,000.00)**
Section 106 Totals - Capital Grants Unapplied (BAL101)			**(729,744.16)**		-	**357,644.55**	-	**(372,099.61)**
TOTAL Section 106			**(3,532,964.99)**		-	**1,034,094.55**	-	**(2,498,870.44)**

This page is intentionally left blank

Cheltenham Borough Council

Cabinet – 14 July 2026

Advice and Inclusion Contract

Accountable member:

Cabinet Member for Housing and Customer Services, Councillor Flo Clucas

Accountable officer:

Head of Strategic Housing, Martin Stacy

Ward(s) affected:

All

Key Decision: Yes

Executive summary:

Cheltenham Borough Council's (CBC's) Advice and Inclusion Contract (the contract) provides independent advice and assistance on debt, financial inclusion, benefits and housing rights advice for residents of Cheltenham. Whilst this service is not a statutory requirement, it does form a key part of CBC's housing and homelessness strategy in tackling and preventing homelessness through early intervention, and in supporting vulnerable people.

The contract was last tendered in 2021 and awarded to North and West Gloucestershire Citizens Advice. It expires on 31st March 2027. The purpose of this report is to seek approval from Cabinet to re-procure the contract.

Recommendations: That Cabinet:

1. **re-procures the Advice and Inclusion Contract for a term of five years from April 1st 2027, with the option of extending the term for a further two years, subject to satisfactory performance and available finance.**

2. **authorises the Head of Strategic Housing, in consultation with the Cabinet Member for Housing and Customer Services, to award the contract to the successful tenderer, following evaluation of the bids.**

3. **authorises the Head of Strategic Housing (or equivalent), in consultation with the relevant Cabinet Member, to extend the contract for a further 2 years, following the end of the first 5 years of the service contract, subject to satisfactory performance and available finance.**

---

1. Implications

1.1 Financial, Property and Asset implications

CBC's cost of this contract will be £175,000 for year one, index-linked by 2% per year. Existing budget set in place for 26/27 includes a contribution of £72k from the General Fund and £36k from the Housing Revenue Account; the difference of £62k will come from the government's Homelessness, Rough Sleeping and Domestic Abuse Grant and legacy homelessness prevention grants.

Should the financial requirements for the delivery of this contract exceed the current available budget, then relevant approvals will be sought to make up the difference. Any risk relating to this is being mitigated, as detailed in the risk register at Appendix 1.

Re-tendering of the Advice & Inclusion Contract will be a financial commitment for a period of 5 years, plus a further 2 years, subject to satisfactory performance of the supplier(s) and available finance.

Signed off by: Ela Jankowska, Finance Business Partner Date: 28.05.2026

Ela.Jankowska@cheltenham.gov.uk

1.2 Legal implications

One Legal can assist in the preparation of suitable contracts and review of procurement proposals and documents for this requirement.

The proposed contract is considered a light touch contract under the Procurement Act 2023 ('Act'). Given the value of the contract, CBC will need to procure it as an above threshold light touch contract. This means that the procurement is subject to lighter regulation than that of a typical above threshold contract, but unlike a below threshold contract, the Act applies.

The contract will be advertised using a tender notice (inviting tenders), then following the issue of assessment summaries, information on the proposed award will be published using a contract award notice (standstill will commence from the date of this notice if CBC are to observe a standstill period (standstill period is not mandatory for light touch contracts)) and finally details of the awarded contract will be published using a contract details notice.

Given that the contract is a light touch contract, CBC may design the procedure for the procurement, providing that it complies with the competitive tendering procedures and:

- considers whether suppliers are excluded or excludable;
- considers whether the requirement could be broken down into lots and the services supplied under more than one contract (but no justification is required in the tender notice);
- has regard to the procurement objectives, namely the importance of:
    - delivering value for money,
    - maximising public benefit,
    - sharing information for the purpose of allowing suppliers and others to understand CBC's procurement policies and decisions; and
    - acting, and being seen to act, with integrity,
- treats suppliers the same unless a different treatment is justified; and
- has regard to the fact that small and medium-sized enterprises may face barriers to participation and consider whether such barriers can be removed or reduced.

The participation and tendering periods set out in the Act are also not mandated for a light touch contract and CBC may take into account additional factors in award criteria to allow (for example) the proximity of the supplier to be considered.

CBC should also note its Best Value Duty and duty to consult, ensuring that representatives of a wide range of local persons are consulted at all stages of the commissioning cycle, including when considering the decommissioning of services.

CBC also has a public sector equality duty, as contained in Section 149 of the Equality Act 2010, where it should consider the relevant of the duty to the service and then retain evidence in order to show that it has complied with the same.

In respect of Local Government Reorganisation, the contract will transfer to the new authority on vesting day under the existing contract specification and parameters (including any geographical limits, for example the administrative area of Cheltenham Borough Council). Any amendment/ modification to the contract after vesting day will need to comply with Schedule 8 of the Procurement Act 2023. The Council should consider whether the intention is for the contract to remain for use in Cheltenham's administrative area or whether there should be scope for it to be extended to the new Authority's administrative area on or after vesting day. If the latter is preferred, unambiguous provisions will be required in the procurement and contract documents to allow the contract to be modified after vesting day – without this, the Council would have limited option to extend and it would be unlikely that the contract could be modified to include the whole of the new administrative area due to financial implications.

Signed off by: Jessica Ball, Lawyer (Commercial) legalservices@onelegal.org.uk

1.3 Environmental and climate change implications

None as a direct result of this report.

Signed off by: Maizy McCann, Climate Change Officer

Maizy.McCann@cheltenham.gov.uk

1.4 Corporate Plan Priorities

This report contributes to the following Corporate Plan Priorities:

- Quality homes, safe and strong communities
- Taking care of your money

1.5 Equality, Diversity and Inclusion Implications

There are a range of specific requirements within CBC's contract specification which set out our expectations of the supplier. These include:

- Having in place and regularly reviewing their policies and working practices to ensure that no aspect of the service discriminates against anyone with a protected characteristic;
- Ensuring that all written communication is easy to understand, compliant with legislation, and is available in a variety of formats and other languages on request;
- Ensuring that adequate private interview space is made available for clients with disabilities, and for clients with children, as well as for clients who wish to be accompanied by a friend, relative, advocate and/or interpreter;
- Providing home visits to clients who are unable to attend normal advice sessions owing to disability or illness; and
- Providing targeted outreach to clients in Cheltenham's most deprived and fuel-poor neighbourhoods, as necessary, where need and risk are greatest.
- Providing reasonable translation facilities, where required.

Please also refer to Appendix 2 of this report for more detailed information.

1.6 Performance management – monitoring and review

Performance will be monitored quarterly throughout the period of the contract against a detailed specification and KPIs, including targets against various outputs and outcomes.

---

2 Background

2.1 CBC currently has an Advice and Inclusion Contract with North and West Gloucestershire Citizens Advice to deliver debt advice, welfare benefits advice, financial inclusion support, and housing rights advice to residents within Cheltenham. A summary of each of the different areas of advice is provided below:

2.1.1 **Debt Advice and Advocacy**

- The debt advice service provides advice and assistance on all matters relating to debt, where housing-related debt forms part of the overall debt. Services include: negotiating with creditors, arranging for debt to be set aside, and representation in court proceedings and tribunals. Clients' incomes are also maximised through welfare benefits advice, and, where appropriate, additional financial assistance is sought from charities and other relevant organisations to help further reduce any unmanageable debt.

2.1.2 **Financial Inclusion**

- The financial inclusion service provides advice and assistance to households in developing their knowledge and skills in order to improve their financial capability, including effective budgeting. This work often overlaps with clients seeking debt and welfare benefits advice, and help with digital inclusion (e.g. in helping a client to access basic online financial services).

2.1.3 **Benefit Take-up Advice & Representation/Advocacy**

- This service provides advice and assistance for clients seeking help with their benefits. It involves liaising with relevant agencies in respect of welfare benefit claims, and in particular, representing clients in tribunals and/or assisting them through appeals processes.

2.1.4 **Housing Rights and Homelessness Prevention**

- The housing rights service provides advice and assistance to enable households to better understand their legal rights and to protect these rights from being potentially abused. The service will represent clients who are at risk of homelessness as a result of actions being taken by relevant bodies and individuals, such as private landlords (e.g. illegal evictions, harassment), social landlords (e.g. decisions to serve notice) and mortgage providers. This early intervention work can have the effect of delaying and indeed preventing homelessness.

2.2 In summary, the following outcomes are expected to be delivered under this contract:

- The prevention of homelessness;
- Reduction in unmanageable debt;
- The prevention of unmanageable debt arising;
- Maximisation of incomes through the take up of welfare benefits;
- Ensuring that residents (and in particular vulnerable residents) are adequately assisted in securing their rights in respect of the services provided under this contract.

2.3 The current contract is due to expire on 31st March 2027. It is proposed that it is retendered on broadly the same terms as provided under the existing contract (subject to updates following the Procurement Act 2023), for the reasons specified below.

3 Reasons for recommendations

3.1 The Advice and Inclusion service plays a key role in supporting CBC's Housing, Homelessness & Rough Sleeping Strategy. It has a focus on preventing homelessness, both directly, through protecting the rights of individuals in their homes and challenging actions by private and social housing landlords, and indirectly, through its emphasis on helping people to manage their debt and on preventing future unmanageable debt from arising.

3.2 This service will also take account of the new rights and responsibilities for tenants and landlords in the Renters' Rights Act 2025. In the event that a landlord is found to be failing in its responsibilities to their tenant, the supplier will refer these to CBC's Private Sector Housing Service (subject to the tenant's consent) for enforcement action to be taken against that landlord. In the absence of the tenant's consent to refer to CBC, then the supplier will engage directly with the landlord highlighting the breaches with a view to these being put right. Even where consent is given, the supplier will still liaise with the landlord to bring about a swift resolution, whilst CBC's Private Sector Housing team will continue down the enforcement path.

3.3 A key element of the Advice & Inclusion Service is its role in supporting vulnerable people. The service places particular emphasis on ensuring that our more vulnerable residents receive appropriate assistance so that their rights are protected.

4 Alternative options considered

4.1 Not to re-procure this advice service. This is rejected for the reasons set out in section 3 above.

4.2 To create separate lots for the different elements of the advice services captured within this proposed service specification. This option is rejected on the basis that debt, benefits advice, financial exclusion, poor digital capability and housing are often inextricably linked. Providing a holistic assessment of a household's overall debt, benefits and housing needs will ensure that risks of homelessness are minimised, as vulnerable clients in particular can sometimes fail to connect with other services after being referred to other agencies. Our proposed approach to commissioning a single advice contract is also likely to deliver greater value for money.

4.3 To provide the service in-house. This was rejected on the basis that there is significant potential for added value to be gained from contracting this service out to an external supplier. In addition, the Advice & Inclusion service offers a degree of independence from CBC, thereby providing the opportunity for residents to seek help in challenging (where appropriate) any adverse decisions taken by Cheltenham's Housing Options and Housing Management Services. This additional layer of scrutiny and potential challenge to CBC can only serve to keep driving up high standards in the delivery of our respective services.

5 Consultation and feedback

5.1 Preliminary market engagement was undertaken earlier this year. Feedback confirmed that the proposed priorities as set out within this report are appropriate in the context of local needs. Both the proposed price and length of the contract were also considered to be realistic and appropriate for the local market.

5.2 In addition, consultation has been undertaken with CBC's Housing Options, Private Sector Housing, and Housing Management Services, who are also supportive of the proposals.

5.3 Finally, wider consultation was undertaken with Cheltenham's Housing & Support Forum, and the Voluntary and Communities Sector in general, drawing in helpful responses which have been considered when finalising the details of our proposed specification.

6 Key risks

6.1 Please see Appendix 1 of this report.

Report author:

Martin Stacy, Head of Strategic Housing, martin.stacy@cheltenham.gov.uk

Appendices:

i. Risk Assessment
ii. Equality Impact Assessment – initial screening
iii. Equality Impact Assessment – Stage 2 (full assessment)

Background information:

N/A

Appendix 1: Risk Assessment

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
	If the proposal to re-procure the Advice & Inclusion Contract, along with an updated service specification, is not agreed, then there are likely to be more residents, particularly vulnerable residents, being incapable of managing their financial affairs adequately, falling into debt and/or becoming homeless. This is also likely to put increased pressures on Cheltenham's Housing Options Service, and other services. In particular, it may lead to an increased use of inappropriate temporary accommodation, such as Bed & Breakfast, at additional cost to this council.	Martin Stacy	3	4	12	Reduce	Cabinet agrees to re-procure the Advice & Inclusion Contract	Martin Stacy	July 2026

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
	If there is no supplier willing or able to offer the service as detailed within the service specification for the estimated value of the contract, then local needs will not be supported.	Martin Stacy	3	1	3	Reduce	The value of the contract has been increased (reflecting cost of living changes) and will be indexed-linked by 2%/year to take account of future increases to the cost of living. The initial length of the contract has been increased from 3 years to 5. Preliminary market engagement has been undertaken, and following feedback, this gives us reasonable confidence there will be interest in delivering this contract.	Martin Stacy	October 2026
	If the successful bidder's proposed contract price exceeds the current available budget, then further approvals may be needed to finance the difference, should there remain	Martin Stacy	1	2	2	Reduce	The value of the contract has been significantly uplifted and will now be index-linked by 2%/year Preliminary market engagement has been	Martin Stacy	March 2027

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
	an appetite to commission this service						undertaken, and following feedback, there is reasonable confidence that the proposed price of the contract is fair. If required, consider the use of other potential funding streams to protect any impact on the General Fund.		

Appendix 2: Equality Impact Assessment (Screening)

---

1. Identify the policy, project, function or service change

a. Person responsible for this Equality Impact Assessment

Officer responsible: Martin Stacy	Service Area: Governance, Housing & Communities
Title: Head of Strategic Housing	Date of assessment: 22.5.26
Signature: *martin stacy*	

b. Is this a policy, function, strategy, service change or project?

Service

If other, please specify: This involves the recommissioning of an existing service.

c. Name of the policy, function, strategy, service change or project

Debt, Benefits, financial inclusion, and housing rights advice services

Is this new or existing?	**Already exists and is being reviewed**

Please specify reason for change or development of policy, function, strategy, service change or project

This is a commissioned service. The contract for this service is due to come to an end on 31st March 2027. It is proposed that the council recommissions this service along broadly the same lines as the currently commissioned service.

d. What are the aims, objectives and intended outcomes and who is likely to benefit from it?

Aims:	The Advice and Inclusion service plays a key role in supporting the council's Housing, Homelessness & Rough Sleeping Strategy 2023-28. It has a focus on preventing homelessness, both directly, through protecting the rights of individuals in their homes and through challenging the actions of private and social housing landlords; and also indirectly, through its emphasis on helping people to manage their debt and on preventing future unmanageable debt from arising.

Objectives:	• The prevention of homelessness; • Reduction in unmanageable debt; • The prevention of future unmanageable debt from arising; • Maximisation of incomes through the take up of welfare benefits; • Ensuring that residents (and in particular vulnerable residents) are adequately assisted in securing their rights in respect of the services provided under this contract.
Outcomes:	• Fewer households owed a statutory homelessness duty and placed in temporary or other emergency accommodation • Less unmanageable debt • Incomes maximised for lower income households
Benefits:	• More households empowered to manage their affairs, helping to prevent them from falling into debt, and to help lift them from potential homelessness.

e. What are the expected impacts?	
Are there any aspects, including how it is delivered or accessed, that could have an impact on the lives of people, including employees and customers.	**Yes**
Do you expect the impacts to be positive or negative?	**Positive**
Please provide an explanation for your answer:	
The proposed recommissioning of this contract will be on the same basis as the service that is already commissioned by the council (i.e. debt, welfare benefits, financial inclusion and housing rights advice). If Cabinet approve the council's recommendation to go out to tender on this basis, then there will be no change to the types of services that are already available to communities across Cheltenham Borough, however, the benefits arising from this service will be significant, given its focus on debt advice, welfare benefits advice, financial inclusion support, and housing rights advice.	

The service will also continue to have a particular focus on ensuring the needs of more vulnerable people are supported, so that they are better able to benefit from the range of advice offered through this service contract.

If your answer to question e identified potential positive or negative impacts, or you are unsure about the impact, then you should carry out a Stage Two Equality Impact Assessment.

f. Identify next steps as appropriate	
Stage Two required	**Yes**
Owner of Stage Two assessment	**Martin Stacy**
Completion date for Stage Two assessment	**22.5.26**

Please move on to Stage 2 if required (intranet link).

This page is intentionally left blank

Appendix 3

Equality Impact Assessment

Introduction

An Equality Impact Assessment (EqIA) is a method for assessing the effects or impacts of a council policy or function on removing barriers to equality.

The Equality Act 2010 includes a public sector equality duty which requires public authorities to try and eliminate discrimination; advance equality of opportunity between persons who share a relevant protected characteristic and those who do not share it and promote equality and good relations across a range of protected characteristics.

The protected characteristics are:

Age	Disability	Gender Reassignment
Marriage and civil partnership	Pregnancy and maternity	Race
Religion or belief (including lack of belief)	Sex	Sexual orientation

An EqIA should be completed with the full range of protected characteristics considered during the initial stages of developing new strategies, policies, functions or services, prior to starting a procurement exercise and before decisions are made.

Examples of when an EqIA should be completed are:

• Any proposals to introduce or add to a service	• Any proposals to adopt policy priorities, strategies and plans
• Any proposals to remove, reduce or alter a service	• Changes to staffing structure where groups of employees are likely to be negatives affected
• Any new policies or changes to policies	• Any proposals in relation to procured or commissioned services

Stage 1 - Equality Screening

Whenever a policy/service or function is reviewed, changed, developed or removed an initial equality impact assessment stage 1 will need to be undertaken. This is a screening template and will help establish whether a full assessment is needed. This should be done at an early stage of the process so that it is part of policy development.

Stage 2 – Equality Impact Assessment

This is the full EqIA and seeks to identify the equality considerations that have bene taken into account including any mitigating actions proposed and ensures decisions are based on evidence. The EqIA will need to be agreed with the appropriate Head of Service or Director and should be included on the decision making report, along with commentary on the assessment in the main body of the report.

STAGE 2 – Full Equality Impact Assessment

1. Engagement and consultation

The best approach to find out if a policy etc, is likely to impact positively or negatively on equality groups is to look at existing research, previous consultation recommendations, studies or consult with representatives of those equality groups.

a. **Research and evidence**
List below any data, consultations (previous, relevant, or future planned), or any relevant research, studies or analysis that you have considered to assess the policy, function, strategy, service change or project for its relevance to equality.
The council has reviewed its contract specification to ensure that it is specifically designed to support some of our most vulnerable people in society with advice and assistance around debt, benefits, financial inclusion and housing rights advice. This contract will therefore, by design, support many households who also fall within one or more of the protected characteristics.
In addition, a key focus of our specification is a requirement for the supplier to regularly review their policies and working practices to ensure that no aspect of the service discriminates against anyone with a protected characteristic. This includes, for example, ensuring that clients have access to sufficient interview room space to accommodate their children, and those with disabilities, and also those who wish to be accompanied by an advocate, etc. In addition, there will be opportunities for home visits should clients be unable to access services due to disability or illness; and provision of translation services, etc.
There is also a requirement for the supplier to provide equalities data to supplement contract monitoring against our proposed targets and outcomes.

b. **Consultation**	
Has any consultation be conducted?	**Yes**
Describe the consultation or engagement you have conducted or are intending to conduct. Describe who was consulted, what the outcome of the activity was and how these results have influenced the development of the strategy, policy, project, service change or budget option. If no consultation or engagement is planned, please explain why.	
The council has consulted with members of our Housing and Support Forum, and with the wider Voluntary and Communities Sector in general. Our Housing and Support Forum is comprised of a range of advice and support agencies working across Cheltenham, including social housing providers, the statutory sector and the voluntary sector. A key focus of our consultation has been to gain an understanding of whether the priorities we have set out in our contract specification is aligned with our Housing,	

Homelessness and Rough Sleeping Strategy, and if not, whether we should focus our priorities elsewhere.

Following consultation, it can be confirmed from the feedback received that this service is supported.

2. Assessment

a. Assessment of impacts

For each characteristic, please indicate the type of impact (positive – contributes to promoting equality or improving relations within an equality group, neutral – no impact, negative – could disadvantage them).

Please use the description of impact box to explain how you justify the impact and include any data and evidence that you have collected from surveys, performance data or complaints to support your proposed changes

Protected Characteristic	Specific Characteristic	Impact	Description of impact	Mitigating Action
AGE	Older people (60+)	Positive	The council will require a central, physical presence within the town, enabling older people to access services in person. This may be more preferable than accessing services online or by phone.	
	Younger People (16-25)	Positive	Online and phone services will be available, which may be more preferable than accessing services in person.	
	Children (0-16)	Positive	Provision of adequate interview room space to enable households to attend with their children, where necessary.	
DISABILITY A definition of disability under the Equality Act 2010 is available here. *See also carer responsibilities under other considerations.*	Physical disability	Positive	Premises will be assessed on their accessibility for disabled people. In addition, there will be a requirement for the supplier to carry out home visits in the event that advice cannot reasonably be provided in any other way.	
	Sensory Impairment (sight, hearing)	Positive	Special provision would be expected to ensure households are able to receive advice services, and are supported as necessary – e.g. help with form filling, etc.	
	Mental health	Positive	Special provision would be expected to ensure households are able to receive advice services, and are supported as necessary – e.g. help with form filling, etc.	
	Learning Disability	Choose an item.	Special provision would be expected to ensure households are able to receive advice services, and are supported as necessary – e.g. help with form filling, etc.	

GENDER REASSIGNMENT		Neutral		
MARRIAGE & CIVIL PARTNERSHIP	Women	Neutral		
	Men	Neutral		
	Lesbians	Neutral		
	Gay Men	Neutral		
PREGNANCY & MATERNITY	Women	Positive	Provision of adequate interview room space to enable households to attend with their children, where necessary	
RACE* Further information on the breakdown below each of these headings, is available here. For example Asian, includes Chinese, Pakistani and Indian etc	White	Positive	Any necessary special arrangements, such as translation services, are expected as part of the contract specification.	
	Mixed or multiple ethnic groups	Positive	Any necessary special arrangements, such as translation services, are expected as part of the contract specification.	
	Asian	Positive	Any necessary special arrangements, such as translation services, are expected as part of the contract specification.	
	African	Positive	Any necessary special arrangements, such as translation services, are expected as part of the contract specification.	
	Caribbean or Black	Positive	Any necessary special arrangements, such as translation services, are expected as part of the contract specification.	
		Positive	Any necessary special arrangements, such as translation services, are	

			expected as part of the contract specification.	
RELIGION & BELIEF** A list of religions used in the census is available here	See note	Neutral		
SEX (GENDER)	Men	Neutral		
	Women	Neutral		
	Trans Men	Neutral		
	Trans Women	Neutral		
SEXUAL ORIENTATION	Heterosexual	Neutral		
	Lesbian	Neutral		
	Gay	Neutral		
	Bisexual/Pansexual	Neutral		
Other considerations				
Socio-economic factors (income, education, employment, community safety & social support)		Positive	This service is specifically focussed on improving outcomes for households who are likely to be on a low income, helping them with benefits, and/or to manage debt, as well as providing debt prevention advice through financial inclusion support; and to help them with their housing rights and any breaches of these rights by their landlord.	
Rurality i.e. access to services; transport; education; employment; broadband		Neutral		
Other (e.g. caring responsibilities)		Neutral		

Page 76

* To keep the form concise, race has not been included as an exhaustive list, please augment the list above where appropriate to reflect the complexity of other racial identities.

** There are too many faith groups to provide a list, therefore, please input the faith group e.g. Muslims, Buddhists, Jews, Christians, Hindus, etc. Consider the different faith groups individually when considering positive or negative impacts. A list of religions in the census is available here

3. Outcomes, Action and Public Reporting

a. Please list the actions identified through the evidence and the mitigating action to be taken.

Action	Target completion date	Lead Officer
None identified.		

b. Public reporting

All completed EqIA's are required to be publicly available on the Council's website once they have been signed off. EqIA's are also published with the papers for committee and full council decisions.

4. Monitoring outcomes, evaluation and review

The Equalities Impact Assessment is not an end in itself but the start of a continuous monitoring and review process. The relevant Service or Lead Officer responsible for the delivery of the policy, function or service change is also responsible for monitoring and reviewing the EqIA and any actions that may be taken to mitigate impacts.

Individual services are responsible for conducting the impact assessment for their area, staff from Corporate Policy and Governance will be available to provide support and guidance, please email if you have any questions.

5. Change log

Name	Date	Version	Change

Cheltenham Borough Council

Cabinet – 14 July 2026

Review of Local Development Scheme and Amendment to Statement of Community Involvement

---

Accountable member:

Cabinet Member Planning and Building Control, Councillor Paul Baker

Accountable officer:

Director Planning and Building Control, Tracey Birkinshaw

Ward(s) affected:

All

Key Decision: Yes

Executive summary:

This report covers two elements of governance supporting the Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan.

1. Local Development Scheme

The Cheltenham Borough Local Development Scheme (LDS) outlines the timetable for preparing statutory development plan documents in the Borough. It is a statutory requirement under section 15 of the Planning and Compulsory Purchase Act 2004 (as amended by the Localism Act 2011). The latest LDS was approved November 2025. An update is required to respond to the active programme management of the Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan and the challenges relating to resources and completion of the evidence base.

2. Statement of Community Involvement

Cabinet adopted the latest version of the Statement of Community Involvement (SCI) November 2025. However, since this time on 25 March 2026 the Government has brought into effect the new plan-making system, subject to transitional provisions (which included making changes in respect of Supplementary Planning Documents) through plan making reforms being exercised through the Levelling-up and Regeneration Act 2023. As from 30 June 2026, no more new Supplementary Planning Documents may be adopted, as such this element of the SCI needs to be updated, together with minor amendments to aid clarification to reflect the stage of preparation of SLP.

Recommendations: That Cabinet:

Local Development Scheme

1. **adopts the updated Local Development Scheme (Appendix 3);**

2. **delegates authority to the Director of Planning & Building Control, in consultation with the Cabinet Member Planning & Building Control to prepare the Local Development Scheme for publication correcting any minor errors such as spelling, grammar, typographical and formatting changes that do not affect its substantive content, and**

3. **delegate any further changes to the Local Development Scheme in respect of the timetabling of the Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan arising from the timing of the completion of evidence studies and/or arising from the direct engagement with Ministry of Housing, Communities and Local Government by the Leaders of Cheltenham, Gloucester and Tewkesbury to the Director of Planning in consultation with the Cabinet Member for Planning & Building Control.**

Statement of Community Involvement

1. **approves the amendments to the adopted Statement of Community Involvement (Appendix 4), and**

2. **delegates authority to the Director of Planning and Building Control, in consultation with the Cabinet Member Planning & Building Control to amend the adopted Statement of Community of Involvement for publication correcting any minor errors such as spelling, grammar, typographical and formatting changes that do not affect its substantive content.**

1. Implications

1.1 Financial, Property and Asset implications

There are currently no additional budget implications from expediting the timeline for the production of the SLP. The partner councils each make an annual contribution for the costs of the work on the SLP. The work concerned was included in the contributions for the term of the current SLP. Future contributions will be agreed as part of the review of the future of the SLP when the current agreement concludes.

Signed off by: Ela Jankowska, Finance Business Partner, ela.jankowska@cheltenham.gov.uk

1.2 Legal implications

The Levelling-up and Regeneration Act 2023 (amending provisions of the Planning and Compulsory Purchase Act 2004) and associated regulations have brought into effect a new plan making system as from 25 March 2026, subject to a number of transitional provisions.

These transitional provisions, as well as removing the ability of local planning authorities to adopt further Supplementary Planning Documents after 30 June 2026, include the saving of various provisions of the Planning and Compulsory Purchase Act 2004 as applied before that date and previous regulations including the Town and Country Planning (Local Planning) (England) Regulations 2012 (the legacy system) in respect of any development plan documents that a local planning authority is preparing for examination. This is provided that the document is submitted for examination no later than 31 December 2026.

The provisions provide that the Secretary of State may direct, for a development plan document as specified in that direction, a date which is later than 31 December 2026, but no such direction has been made to date in respect of the Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan.

Therefore, in order to progress with the Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan, not only will this need to be such that it is submitted for examination, unless and until a direction provides otherwise, by 31 December 2026; it will also need to accord with provisions of the legacy system.

Under the legacy system, the preparation and maintaining of a Local Development Scheme is required and this must specify (among other matters) the documents which, when prepared, will comprise the Local Plan for the area (being under the legacy system Development Plan Documents), the subject matter and geographical area to which each document is to relate, which if any are to be prepared jointly with one or more other local planning authorities and the timetable for the preparation and revision of those documents. Under the legacy system the Local Plan, together with

Neighbourhood Plans as well as any Mineral and Waste Local Plans, make the Development Plan for the Council.

Section 28 of the Planning and Compulsory Purchase Act 2004 provides that where a Development Plan Document is prepared jointly by two or more local planning authorities any step which may be or is required to be taken in relation to the document (including adoption) must be done by each of the authorities.

Regulation 18 of the Town and Country Planning (Local Planning) (England) Regulations 2012 requires that in the preparation of a local plan the local planning authority must notify certain bodies and persons of the subject of a local plan and invite them to make representations to the local planning authority about what a local plan with the subject ought to contain (and then must take any representations made to such invitations into account when preparing the plan). Persons at this stage include such residents or other persons carrying on business in the local planning authority's areas from which the local planning authority consider it appropriate to invite representations and it is for the local planning authority therefore to consider the appropriate persons and methods for consultation at this stage; and such consultation may take a more focused form.

Under regulation 19 of the Town and Country Planning (Local Planning) (England) Regulations 2012 there are requirements for publication of proposed submission documents and a formal representations procedure (which must be for a period of not less than 6 weeks) to take place before the local plan is submitted to the Secretary of State for examination. The local planning authority will still need to ensure that reasonable alternatives have been adequately considered through plan-making.

Where a development plan document has been adopted (whether before or after 25 March 2026) it will have effect as part of the development plan for the authority's area until a Local Plan for the authority's area is adopted under the new planning making system (with the progression of a Local Plan under the new planning making system to have started at least within 4 years and 8 months from the date the development plan document has been adopted.)

Section 18 of the Planning and Compulsory Purchase Act 2004 requires all local planning authorities to adopt a Statement of Community Involvement being a statement of the authority's policy as to the involvement in the exercise of its functions in respect its review of matters expected to affect development of their area, the preparation and revision of local document developments (under the legacy system) and various aspects of development control.

It also have to take into account section 6 of the Neighbourhood Planning Act 2017, which states that a "statement of community involvement must set out the local planning authority's policies for giving advice and assistance" in relation to

Neighbourhood Planning.

Signed off by: One Legal, legalservices@onelegal.org.uk

1.3 Environmental and climate change implications

None arising from this report. However, the Government requires the plan making process to address the impacts of climate change and plan for sustainable development.

To note, a Climate Change impact assessment has not been completed for this decision as the decision relates wholly to the governance elements of the council's statutory development plan. However, the outputs driven by the decision will be subject to assessment.

Signed off by: [Maizy McCann, Climate Officer, Maizy.McCann@cheltenham.gov.uk

1.4 Corporate Plan Priorities

This report contributes to the following Corporate Plan Priorities:

- Securing our future
- Quality homes, safe and strong communities
- Reducing carbon, achieving council net zero, creating biodiversity
- Reducing inequalities, supporting better outcomes

1.5 Equality, Diversity and Inclusion Implications

See *Appendix 2.*

1.6 Performance management – monitoring and review

Managing the programme and risks associated with development plan preparation is active and managed by the SLP programme. Programme management is active and reported to the Senior Responsible Owner and managed through agreed programme arrangements. Strategic risks related to the programme are reported regularly via Leadership Team and quarterly to Cabinet and Audit Committee.

---

2 Background

2.1 The purpose of this report is twofold:

1. To seek adoption of the updated Local Development Scheme (LDS) 2026-2029, which outlines the timetable for preparing statutory Development Plan Documents for Cheltenham Borough Council, and

2. Make amendments to the Statement of Community Involvement (SCI), as adopted by Cabinet on 18th November 2025 to reflect changes made by Government arising from planning reforms in the context of the Levelling-up and Regeneration Act 2023.

3 Local Development Scheme

3.1 Local Planning Authorities are required by law to prepare, publish, and maintain a Local Development Scheme (LDS) setting out the timetable for preparing statutory Development Plan Documents (DPD), which form the Local Plan.

3.2 The Council's current LDS was adopted in 2025 and at this time a commitment was made to prepare a Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan (SLP) for Submission to the Secretary of State for examination in November 2026.

3.3 Significant progress has been made in the preparation of the SLP. This includes:

- Community and stakeholder consultation and engagement;
- Ongoing 'call for sites', inviting the submission of sites for the councils to assess as potential development opportunities;
- Completion of in-house evidence relating to:
    - Housing monitoring and employment monitoring,
    - Assessment of site opportunities through the Housing and Economic Land Availability Assessment.
    - Preparation of 'urban capacity studies' to ensure all possible development opportunities are identified within the built-up areas of Cheltenham, Gloucester and Tewkesbury,
    - Analysis of density to ensure that the best use of potential sites, reflective of local character.
    - Infrastructure Delivery Plan baseline, identifying infrastructure projects necessary to support existing levels of growth in the area.
- Ongoing engagement with neighbouring district councils, Gloucestershire County Council and other bodies around strategic 'cross-boundary' planning matters;
- Progression of a large number of evidence studies, that are now complete, close to completion or underway, including;

- Sustainable Transport Strategy
- Renewable Energy Study
- Housing and Economic Needs Assessment
- Green Belt Review
- Strategic Flood Risk Assessment and Water Cycle Study
- City/Town Centre Study
- Gypsy and Traveller Accommodation Assessment
- Employment Land Assessment
- Landscape Assessment
- Viability Assessment
- Infrastructure Delivery Plan (SLP development)
- Sustainability Appraisal
- Habitats Regulations Assessment

3.4 However, like many councils, the SLP authorities are experiencing a range of difficulties in meeting the current timetable. These primarily relate to:

- The market for professional planners and other specialists is incredibly difficult, with significant demand from councils, consultancies and the Planning Inspectorate, all competing for a limited number of people. This has made recruitment, and retention of staff, difficult, and impacted capacity within the SLP team.
- Delivery of evidence studies necessary to support the plan. Local plans must be underpinned by robust evidence, supporting the strategy, site allocations and policies. At present, difficulties are being experienced with several studies, in light of their technical nature, and interrelationship with other studies.

3.5 In light of this, the SLP Joint Advisory Group has discussed and agreed that a small extension to the programme is appropriate, with council approvals moved from July to October 2026. This will allow time for the completion of evidence studies and consideration as part of the plan-making process, whilst still allowing Submission to the Secretary of State by the Government’s deadline of 31 December 2026.

3.6 The proposed timetable is as follows:

Evidence gathering, plan-preparation and community and stakeholder engagement (Regulation 18)	February 2025 – September 2026
Council approvals for the Pre-Submission SLP (Regulation 19)	October 2026
Consultation on Pre-Submission Strategic and Local Plan (Regulation 19)	End of October/Early November – December 2026
Submission to the Secretary of State (Regulation 22)	December 2026

3.7 Following Submission, the Planning Inspector will take control of the examination process from start to finish and importantly will determine the timetable for examination hearings and other matters.

3.8 In addition to the above, the opportunity has been taken to amend the LDS to clarify the way the SLP is being delivered. The previous LDS noted that policies relating to Cheltenham Borough would be prepared by Cheltenham Borough Council officers. However, in light of resourcing needs, and specialisms within the SLP team, these policies will be prepared and supported by Cheltenham Borough Council officers, as well as wider SLP officers. This wording has therefore been deleted.

3.9 Notwithstanding the above, it should be noted that the Leaders of the SLP authorities are in direct communication with the Ministry of Housing, Communities and Local Government to seek agreement on a degree of flexibility in relation to the submission date. The purpose of this is to help manage the risk around ensuring all elements of the evidence base are completed and reflected in the Pre submission SLP (Regulation 19). Accordingly, this report seeks appropriate delegated authority to amend the LDS, should any further changes be required.

4 Statement of Community Involvement

4.1 Further changes to the Council's Statement of Community Involvement (SCI) are required to ensure it remains consistent with the Government's planning reforms introduced through the Levelling-up and Regeneration Act 2023 and associated regulations.

4.2 The amendments made to the Planning and Compulsory Purchase Act 2004 (2004 Act), by the Levelling-up and Regeneration Act 2023 represents a significant overhaul of the planning system in England, with the objective of making plan-making faster, clearer and more accessible, while strengthening community engagement and supporting housing delivery.

4.3 Within these amendments, the Government has removed the ability for local planning authorities to prepare and adopt Supplementary Planning Documents (SPDs) subsequent to 30 June 2026. These are effectively replaced within the new plan making system by the ability to prepare “supplementary plans”, which (unlike SPDs) will form part of the statutory development plan, be subject to formal consultation and independent examination, and generally be restricted to site-specific matters or design coding.

4.4 This represents a fundamental shift from the previous approach, where SPDs, which are not part of the development plan itself and are not subject to independent examination, provide guidance in respect of policies within the development plan, supported by bespoke consultation arrangements set out within regulations and in the SCI. Under the new framework, policy and guidance will instead be consolidated within the statutory development plan and nationally set policies, alongside new requirements such as locally prepared design codes.

4.5 In addition, wider reforms within the Levelling-up and Regeneration Act 2023, such as a streamlined local plan process, the removal of the duty to cooperate, and a stronger emphasis on clear and accessible plan-making, further reinforce the move toward a more standardised and plan-led system.

4.6 As a result, the SCI must be updated to:

- remove references to SPD preparation and consultation;
- clearly set out how communities and stakeholders will continue to be engaged through development plan documents (as progressed under the pre-existing plan making regime within the PCPA 2004 (legacy system), neighbourhood planning, and development management processes.

4.7 Amending the SCI will ensure that the Council’s approach to community engagement remains legally compliant, transparent and effective within the reformed planning system and the transitional provisions, and continues to provide clarity to residents, businesses and stakeholders on how they can participate in planning decisions.

4.8 In terms of SPDs we already have approved, these will not be immediately revoked and will remain in place until such time as the development plan document to which the supplementary planning document relates (that is the development plan document which contains the policy the subject of the SPD) no longer has effect.

4.9 The Cheltenham SCI as updated aligns with the refresh of SCI’s undertaken by Gloucester City and Tewkesbury Borough.

5 Reasons for recommendations

5.1 The Council has a statutory responsibility to ensure its governance arrangements in respect of plan making is up to date.

6 Alternative options considered

6.1 In respect of the SCI there is no alternative. Ensuring the SCI is up to date is best practice and provides clarity for any stakeholder wishing to engage in the plan-making and planning decision making processes.

6.2 The LDS timetable set out above is the only option available that would allow for the Submission of the SLP to the Secretary of State by the Government's deadline of 31 December 2026, for the Plan to be examined under the current regime. The only other alternative would be to prepare a new Plan under the new regime created by the Levelling-up and Regeneration Act 2023.

6.3 As noted above, the Leaders of the SLP councils are in direct engagement with the Ministry of Housing, Communities and Local Government.

7 Consultation and feedback

7.1 The LDS functions as a maintained timetable of the Authority's commitment to produce Development Plan Documents. Whilst there is no statutory requirement to consult on the LDS itself, any Development Plan Documents described within it are subject to various consultation requirements.

7.2 There is no statutory requirement for consultation on the SCI. As outlined in this report the SCI was only reviewed November 2025 and adopted by Cabinet. Changes are only being made now due to changes made by Government as part of the wider planning reforms.

8 Key risks

8.1 See *Appendix 1.*

Report author:

Tracey Birkinshaw, Director Planning & Building Control,
tracey.birkinshaw@cheltenham.gov.uk

Appendices:

1. Risk Assessment
2. Equality Impact Assessment – Screening
3. Updated Cheltenham Local Development Scheme
4. Updated Statement of Community Involvement

Background information:

Cheltenham Corporate Plan (2023-2027)

Planning and Compulsory Purchase Act (as amended)

Levelling Up and Regeneration Act (2023)

Government Guidance on Plan Making

National Planning Policy Framework

Appendix 1: Risk Assessment

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
1	If the Council does not have an up-to-date Local Development Scheme then it will not be performing part of its statutory duty	Director of Planning and Building Control	3	1	3	Avoid the risk	Close	This risk will be mitigated by the Cabinet decision.	14 July 2026
2	If the Council does not have an up-to-date Statement of Community Involvement, then it will not be performing part of its statutory duty	Director of Planning and Building Control	3	1	3	Avoid the risk	Close	This risk will be mitigated by the Cabinet decision.	14 July 2026

Appendix 2: Equality Impact Assessment (Screening)

1. Identify the policy, project, function or service change

a. Person responsible for this Equality Impact Assessment	
Officer responsible: Tracey Birkinshaw	Service Area: Planning
Title: Director Planning & Building Control	Date of assessment: 15 June 2026
Signature: Tracey Birkinshaw	

b. Is this a policy, function, strategy, service change or project?	Policy
If other, please specify:	

c. Name of the policy, function, strategy, service change or project	
Cheltenham Local Development Scheme Cheltenham statement of Community Involvement	
Is this new or existing?	**Already exists and is being reviewed**
Please specify reason for change or development of policy, function, strategy, service change or project	
Local Development Scheme needs to be updated to reflect the current programme of the Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan. The Cheltenham Statement of Community Involvement needs to be updated to reflect planning reforms implemented by Government.	

d. What are the aims, objectives and intended outcomes and who is likely to benefit from it?	
Aims:	To ensure documents are up to date.
	As above.

Objectives:	
Outcomes:	To deliver transparency and clarity for all stakeholders.
Benefits:	As above.

e. What are the expected impacts?	
Are there any aspects, including how it is delivered or accessed, that could have an impact on the lives of people, including employees and customers.	**Yes**
Do you expect the impacts to be positive or negative?	**No impact expected**
Please provide an explanation for your answer:	
The Council already has a Local development Scheme and Statement of Community Involvement in place.	

If your answer to question e identified potential positive or negative impacts, or you are unsure about the impact, then you should carry out a Stage Two Equality Impact Assessment.

f. Identify next steps as appropriate	
Stage Two required	**No**
Owner of Stage Two assessment	**N/A**
Completion date for Stage Two assessment	**N/A**

CHELTENHAM
BOROUGH COUNCIL

Local Development Scheme

~~2025-2028~~2026-2029

Published on XX July 2026

1. Introduction

1.1 Cheltenham Borough Council has a statutory duty to maintain an up-to-date LDS[1]. This LDS sets out the Development Plan Documents (DPDs)[2] that will be prepared and the programme for their preparation. This LDS supersedes any previously published LDS.

[1] Section 15 of the Planning and Compulsory Purchase Act 2004 (as amended)

[2] A document setting out the Council's planning policies and proposals. They are subject to community involvement, consultation and independent examination by an independent Planning Inspector

2 Proposed Development Plan Document (DPD)

2.1 Cheltenham Borough Council, in conjunction with Gloucester City Council and Tewkesbury Borough Council, are producing one DPD as can be seen in Figure 1.

Figure 1: Proposed Development Plan Document

The Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan (SLP) (produced by Gloucester City Council, Cheltenham Borough Council and Tewkesbury Borough Council)	
Role and subject / Geographical coverage	This will set out the development strategy; development requirements; policies (strategic and non-strategic) and site allocations for Gloucester City Council, Cheltenham Borough Council and Tewkesbury Borough Council. ~~***Strategic plan policies*** - drafted jointly by Gloucester City Council, Cheltenham Borough Council and Tewkesbury Borough Council with the support of Gloucestershire County Council~~ ~~Cheltenham ***local plan policies*** – drafted by Cheltenham Borough Council~~
When adopted, will supersede	i. Gloucester, Cheltenham and Tewkesbury Joint Core Strategy 2011-2031 (adopted December 2017); ii. Cheltenham Plan (adopted July 2020); and iii. Remaining, yet to be replaced 'saved' retail policies of the Cheltenham Borough Local Plan Second Review (adopted June 2006).
Timetable – Key Stage[3]	
Evidence gathering, plan-preparation and community and stakeholder engagement (Regulation 18)	February 2025 – ~~April~~ September 2026
Council approvals for the Pre-Submission SLP (Regulation 19)	~~May – July~~October 2026
Consultation on Pre-Submission Strategic and Local Plan (Regulation 19)	End October/Early November - December 2026~~August - September 2026~~
Submission to the Secretary of State (Regulation 22)	~~October – November~~December 2026
Stages below subject to Planning Inspector Programme	

[3] Regulation references taken from The Town and Country Planning (Local Planning) (England) Regulations 2012) as amended

Hearings (sometimes referred to as Examination in Public[4]) (Regulation 24) and Major Modifications Consultations (the latter if needed)	TBC
Inspector's final report sent to LPA (Regulation 25)	TBC
Adoption (Regulation 26)	TBC

3 Policies Map

3.1 The Policies Map spatially illustrates policies contained in DPDs on an Ordnance Survey base map. The Policies Map will be updated as the SLP is progressed. The Policies Map will show matters including:

i. designations, e.g. settlement boundaries; and

ii. site allocations, e.g. sites may be allocated for a variety of uses including housing.

4 Neighbourhood Plans

4.1 Neighbourhood Plans are prepared to timescales that are set by the qualifying body, such as a Parish Council and not by Cheltenham Borough Council. Therefore, the timetable for their preparation is not contained within this LDS. Following successful examination and referendum, Neighbourhood Plans become part of the statutory Development Plan.

4.2 For communities that may wish to develop their own Neighbourhood Plan, information can be found via Neighbourhood Plans.

[4] The examination begins when the Plan is submitted to the Planning Inspectorate and is completed when the final report is sent to the Local Planning Authorities.

CHELTENHAM
BOROUGH COUNCIL

Statement of Community Involvement

Date of Publication: ~~19 November 2025~~xx July 2026

Table of Contents

CONTENTS

1. INTRODUCTION

What is the Statement of Community Involvement?

1.1 The Statement of Community Involvement (SCI) sets out how Cheltenham Borough Council (CBC) will seek the involvement of the community in the planning of the area. All Local Planning Authorities (LPAs) are required by law[1] to prepare a SCI. This SCI is a statement of CBC's policy for involving interested parties in matters relating to development in their area. The SCI sets out how CBC will involve the local community, businesses and interest groups in the planning process, in a manner consistent with relevant statutory requirements.

1.2 Paragraph 16 of the National Planning Policy Framework ~~(NPPF)~~ (2024 as updated February 2025) (NPPF) states, amongst other aspects, that *"Plans should… be shaped by early, proportionate and effective engagement between plan-makers and communities, local organisations, businesses, infrastructure providers and operators and statutory consultees".*

1.3 CBC's planning functions can be summarised broadly as follows:

i. Plan-Making and production of guidance;

ii. Assistance with Neighbourhood Plan-Making;

iii. Decision-Making, e.g. determining planning applications; and;

iv. Monitoring / Enforcement of planning permissions.

1.4 'Community' refers to all interested parties that live, work or do business in the area and includes residents, businesses, community and interest groups, neighbourhood planning forums, landowners, developers, adjoining local authorities, government agencies.

1.5 The planning system is plan-led, and any planning application must be determined in line with the Development Plan (Local and Neighbourhood Plans) unless material considerations[2] indicate otherwise.

Reviewing the SCI

1.6 Cheltenham Borough Council are working jointly with Gloucester City Council and Tewkesbury Borough Council to produce a Strategic and Local Plan (SLP) for their areas. The SCI has been reviewed and updated to ensure that it properly reflects the joint working and consultation arrangements that are proposed for the preparation of the SLP. The Government revised the National Planning Policy Framework in December 2024 and it is also necessary to ensure that this SCI incorporates relevant changes to national policy.

1.7 As well as setting out the consultation that will take place on the SLP, the SCI will also advise

[1] Section 18 of the Planning and Compulsory Purchase Act 2004 (as amended).

[2] The Planningportal gives an indication of what constitutes a material consideration, and it includes the NPPF, and material representations made by local residents and consultees on planning applications.

on the consultation that Cheltenham Borough Council will undertake on ~~other planning policy documents such as~~ Neighbourhood Plans (Section 3) ~~, Supplementary Planning Documents (Section 4)~~ and planning applications (Section 4~~5~~).

Benefits of Consultation

1.8 Greater opportunities for community involvement can benefit communities by:

i. Providing a means for people to express their views, such as on the services that they want and that services are provided in the interests of the community;

ii. Providing an opportunity to influence the decision-making process and shape the future of the area;

iii. Complementing and supporting the strategic planning process and the delivery of infrastructure, development and services across the area;

iv. Providing a greater sense of ownership and accountability for CBC's decision-making;

v. Gaining a better understanding of community needs, improving community cohesion and fostering a sense of inclusion;

vi. Time and money efficiencies through quicker decision-making and speedier implementation of schemes and policies;

vii. Fostering a better understanding of the way that CBC services (particularly planning) work;

viii. Increasing input to problem solving and suggestions of new ideas;

ix. Improving participation in services, and;

x. Social value.

Principles for Community Involvement

1.9 The SCI is based on the following principles for Community Involvement. The Council will:

i. Ensure that the purpose of the consultation is clear;

ii. Ensure that consultation will be accessible to the community, through using plain English , wherever possible ~~and highlighting that information can be provided in different formats or languages upon request and providing a point of contact~~;

iii. Ensure that the consultation undertaken meets the relevant statutory requirements;

iv. Engage with communities, including hard to reach groups, at the earliest opportunity including using community networks and forums as well as wider online media channels, as appropriate;

v. Ensure that consultation methods are appropriate;

vi. Ensure that consultation is meaningful;

vii. Ensure processes are transparent, accountable and easy to understand;

viii. Be proactive about consultation and use a range of appropriate methods where these will widen the opportunity to contribute;

~~ix. Notify engaged consultees in advance of key events and decisions in the consultation process, and;~~

~~x. Such notification will primarily be through low-cost means only such as web postings and email.~~

Involving the Community

1.10 The SCI aims to ensure that all interested members of the community get involved in the consultation process, whether that be responding to a planning application or commenting on a planning policy consultation.

1.11 In terms of plan-making and production of guidance, as well as assistance with Neighbourhood plan-making, the Council is required by law to consult certain organisations and bodies.

1.12 The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended) sets out a list of specific and general consultation bodies, to be involved in the consultation process when preparing Local Plans ~~and Supplementary Planning Documents (SPDs)~~. Under the Regulations, CBC must consult with specific consultation bodies which they consider have an interest in the subject, and the general consultation bodies which it considers are appropriate.

1.13 General consultation bodies are bodies representing the interests of certain parts of the local community. These bodies fall into a number of groups, as follows:

i. Voluntary bodies;

ii. Racial, ethnic or national groups;

iii. Religious groups;

iv. Disabled persons groups, and;

v. Business groups.

1.14 As well as the ‘specific’ and ‘general’ consultation bodies[3], CBC will also consult “such residents or other persons carrying on business in the local planning authority’s area from

[3] These are the consultation bodies as defined through The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended).

which the local planning authority consider it appropriate to invite representations"[4]. CBC recognise that many members of the community are hard to reach or engage with for a variety of reasons. The Council will try to modify traditional consultation methods where appropriate to engage with such groups and individuals. The list is not exhaustive but includes:

i. People belonging to race, cultural and ethnic groups;

ii. People who are male or female;

iii. People who intend to plan or undergo or who are undergoing or have undergone gender reassignment;

iv. People of different ages, including children and older people;

v. People with disabilities and / or mental health conditions;

vi. People who have a religion or belief, or who do not;

vii. People who are gay, lesbian, bisexual, heterosexual;

viii. People who are married or in a Civil Partnership;

ix. People who are pregnant or subject to maternity agreements;

x. People who are living on low incomes, and;

xi. People who are veterans.

1.15 A database is maintained, which contains contact details of individuals, groups and other bodies that wish to be kept informed of consultations relating to planning policy documents. People can request that they are added to (or removed from) the consultation database.

1.16 Cheltenham BC will make use of different methods of consulting, which may include those listed below.

Consultation Methods	**Details**
Webpages	Containing links to all consultation documents
Digital engagement methods	May include digital engagement platforms; Online polling / surveying; Webinars/online events; Digital collaboration tools; Map

[4] Regulation 18(2)(c) of The Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended).

	based and spatial tools
Emails or letters	Sent to contacts in database
Surveys and questionnaires	To be completed online or on paper
Public events	Designed for residents and other interested parties
Stakeholder workshops	To inform and to gain feedback from various stakeholders
Member briefing session	Elected members
Press releases	Information provided to media outlets
Social networking sites and online present	e.g. Facebook, Instagram, LinkedIn and X
Using existing networks	e.g. Local Nature Partnership

1.17 The Town and Country Planning (Development Management Procedure) (England) Order (DMPO) 2015 (as amended) and The Town and Country Planning (Environmental Impact Assessment) Regulations 2017 (as amended) set out the statutory consultation bodies for different types of planning applications, the minimum consultation periods and the statutory consultation process for consulting on planning applications.

1.18 For Neighbourhood Planning, The Neighbourhood Planning (General) Regulations 2012 (as amended) set out various requirements, including those relating to Neighbourhood Development Plans.

Role of Councillors

1.19 Councillors play an important role in the preparation of and final decision-making on local planning policy, as well as in decision-making such as determining some planning applications. Councillors on the Planning Committee are under a specific duty to determine applications in accordance with the policies of the development plan, unless material considerations indicate otherwise.

2. LOCAL PLANS

Introduction to Local Plans

2.1 As set out in the glossary to the NPPF, Local Plans are "A plan for the future development of a local area, drawn up by the local planning authority in consultation with the community, under the Town and Country Planning (Local Planning) (England) Regulations 2012. A local plan can consist of either strategic or non-strategic policies, or a combination of the two". Cheltenham Borough Council are working jointly with Gloucester City Council and Tewkesbury Borough Council to prepare a Strategic and Local Plan (SLP) for the joint area.

2.2 The Council will maintain a Local Development Scheme (LDS) which, amongst other matters, will specify a timetable for the preparation of any Local Plan. The LDS's of Cheltenham Borough Council, Gloucester City Council and Tewkesbury Borough Council have been aligned to reflect the timetable for the SLP. CBC will also keep under review the matters which may be expected to affect the development of their area of the planning of its development. CBC may also keep under review matters in relation to any neighbouring area to the extent that those matters may be expected to affect the area of the authority.

2.3 CBC will consult beyond statutory consultees where appropriate~~ and will aim for a town wide consultation by holding public consultation events at appropriate stages in the plan-making process~~.

Consultation Requirements

2.4 All consultations on Local Plans will comply with the Town and Country Planning (Local Planning) (England) Regulations 2012 (as amended) by achieving the following as a minimum:

i. Consultation on Issues and options under Regulation 18;

ii. Consultation on the pre-submission version of the SLP under Regulation 19;

iii. Each consultation will have published on the website a statement that sets out any consultation that has already taken place and how comments / representations to the consultation can be made. The statement is for information and is not itself being consulted upon;

iv. All formal consultation periods will be open to comments for a minimum of six weeks;

v. Consultation documents will be made available at the Council office and public libraries through free access to a computer and the internet. Documents can also be provided in other formats and languages upon request;

vi. To enable assistive technologies and avoid digital exclusion, public comments will be accepted through the provided internet portal, in writing and by email, and

vii. CBC will also ensure that the relevant evidence base documents are accessible online.

Regulation 18 Stage

2.5 This stage is primarily intended to be an open discussion of the issues and options that relate to the topic. This stage provides an opportunity to influence the direction of the Plan at an early point in the plan making process. The discussions should reflect that freedom. A range of approaches can be appropriate at this stage, in order to be able to explore the issues in detail. There can be more than one phase of consultation at this stage.

2.6 The issues and options consultation (Spatial Options and Key Policy Areas), under Regulation 18, took place from 16th January until 13th March 2024. Information on that consultation can be found on the SLP website[5].

2.7 Following the initial consultation with residents and businesses that took place in 2024, the ~~joint~~ SLP authorities undertook ~~are proposing~~ further engagement on the SLP through its website consultation portal ~~workshops and targeted consultation events~~ in 2025 and 2026. These ~~will~~ focused on spatial options, topic papers and specific evidence~~, strategy and policy options~~studies.

2.8 Responses received on social media (Twitter, Facebook and X, for example) will not be considered as formal representations in relation to consultations.

~~2.9 The policies of the SLP will also be informed by a variety of evidence studies. These will be on subjects such as housing and economic needs, landscape, Green Belt, transport and specialist housing needs, for example the needs of the Gypsy and Traveller community. Targeted consultation may take place during the development of these evidence documents (depending on the subject matter), and they will be made available on the SLP website once they have been completed.~~

Regulation 19 Stage – Proposed Submission

~~2.10~~2.9 The Regulation 19 version of the local plan is sometimes referred to as the "pre-submission" version of the plan. This is the last stage at which there is an opportunity for people and organisations to make representations on the local plan. This version of the plan will be submitted for Examination in Public (EiP) alongside the representations that have been made to it and ~~any~~ may include modifications considered necessary. The EiP will be presided over by an independent planning inspector who will determine whether the SLP meets the tests of soundness and legal requirements, having regard to a variety of matters including national policy and the representations that have been made.

~~2.11~~2.10 Responses received on social media (X and Facebook for example) will not be considered as formal representations in relation to consultations. Consultation responses made at this stage will be made publicly available in full.

[5] » Consultations & Engagement

Examination Stage

~~2.12~~2.11 When the SLP is submitted to the Secretary of State[6] for examination, the authorities will submit a 'statement of consultation' that will summarise the main issues raised through representations. There may need to be further formal consultation carried out during the examination stage on potential modifications to the Plan. This is at the discretion of the planning inspector[7].

[6] The Secretary of State will appoint a planning inspector.

[7] The Planning Inspectorate produce a 'Procedure Guide for Local Plan Examinations', which is described as a "*Guide aimed at all those involved in the process and concerned with the procedural aspects of examining a local plan*"

3. NEIGHBOURHOOD PLANS

Introduction to Neighbourhood Plans

3.1 Neighbourhood Plans are produced by Qualifying Bodies (QB)[8], rather than CBC. The QB and CBC follow various requirements, including those within The Neighbourhood Planning (General) Regulations 2012 (as amended), to progress a Neighbourhood Plan. The QB follow various requirements to progress a Neighbourhood Plan and must carry out their own consultation before they submit it to CBC. CBC must then publicise the document and invite representations before sending it to independent examination.

3.2 The Neighbourhood Planning Act 2017 (as amended) sets out that the SCI is required to set out the Council's policies for giving advice or assistance to the QB in preparing a Neighbourhood Development Plan or Development Order. The table below sets out the support that Cheltenham Borough Council will provide in terms of neighbourhood planning.

Neighbourhood Planning Stage	**Responsibility**	**Cheltenham Borough Council Support**
Deciding to prepare a neighbourhood plan or development order	Parish Councils or Designated Neighbourhood Forum in non-parished areas (Qualifying Body)	We will discuss your ideas for doing a neighbourhood plan to establish if a plan is suitable for your community. We will outline some initial aspects to help you consider whether to proceed. If you are in a non-parished area, we will tell you how to apply to be a Designated Neighbourhood Forum.
Designating the Neighbourhood Area	Qualifying Body	We will review the application and make the necessary arrangements to designate the neighbourhood area. Where necessary, the Council will undertake a consultation on the proposed area.
Preparing the Neighbourhood Development Plan	Qualifying Body	

[8] Section 38A (12) of the Planning and Compulsory Purchase Act 2004 (as amended) sets out that a *"'qualifying body' means a parish council, or an organisation or body designated as a neighbourhood forum, authorised for the purposes of a neighbourhood development plan to act in relation to a neighbourhood area…"*

Public consultation on a draft Neighbourhood Development Plan (Regulation 14)	Qualifying Body Responsible for the consultation arrangements on the draft plan and for bringing it to the attention of people who live, work or run a business in the designated neighbourhood area.	We will review the plan for environmental assessment requirements and other legislation including whether the NDP is likely to meet the legal requirements, i.e. the basic conditions, which include whether the NDP is in general conformity with the adopted Development Plan.
Submission of the draft neighbourhood plan to the local authority (Regulation 16)	Qualifying Body submits the plan. Cheltenham Borough Council responsible for next steps	We will make the arrangements to publicise (consult on) the plan for a minimum of 6 weeks and will, in conjunction with the Qualifying Body, appoint the independent examiner.
Examination of the Neighbourhood Plan	Cheltenham Borough Council / Examiner	We will make any necessary arrangements for the holding of the examination. On receipt of the examiner's report, we will work with the Qualifying Body to incorporate any recommended changes to the plan
Referendum	Cheltenham Borough Council	Responsible for arranging and holding the referendum
Neighbourhood Plan formally 'Made'	Cheltenham Borough Council	We will hold a Council meeting, providing more than 50% of those taking part in the referendum vote in favour of the plan being made part of the Development Plan, for the Neighbourhood Plan to be formally made provided none of the legislative exceptions apply. We will publish details of the plan and notify the Qualifying Body, and anyone known to have an interest in it

Consultation Requirements

3.3 With regard to the post submission stage of a ~~applications made to the LPA relating to the~~ Neighbourhood Plan, as long as the QB satisfies various requirements then CBC will publicise the plan proposal. CBC will comply with the following as a minimum:

i. There will be one formal consultation period, known as 'Regulation 16'[9];

ii. The consultation period will be open to comments for a minimum of six weeks;

iii. To enable assistive technologies and avoid digital exclusion, public comments will be accepted through the provided internet portal, in writing and by email; and

iv. Consultation documents will be made available at relevant Councils' offices and public libraries through free access to a computer and the internet.

3.4 Responses received on social media (X and Facebook, for example) will not be considered as formal representations in relation to consultations.

[9] As per The Neighbourhood Planning (General) Regulations 2012 (as amended)

~~4. SUPPLEMENTARY PLANNING DOCUMENTS (SPDS)~~

~~INTRODUCTION TO SPDS~~

~~4.1 Supplementary Planning Documents (SPDs) add further detail to the policies in the Development Plan. As set out in the glossary to the NPPF, *"They* (SPDs) *can be used to provide further guidance for development on specific sites, or on particular issues, such as design. Supplementary planning documents are capable of being a material consideration in planning decisions but are not part of the development plan".*~~

~~CONSULTATION REQUIREMENTS~~

~~4.2 All consultations on SPDs will comply with the following as a minimum.~~

~~i. There will be at least one formal consultation period, known as the 'Regulation 12'[10] stage;~~

~~ii. Each consultation will have published on the website a statement that sets out any consultation that has already taken place and how comments / representations to the consultation can be made. The statement is for information and is not itself being consulted upon;~~

~~iii. All formal consultation periods will be open to comments for a minimum of four weeks;~~

~~iv. To enable assistive technologies and avoid digital exclusion, public comments will be accepted through the provided internet portal, in writing and by email;~~

~~v. Consultation documents will be made available at CBC's office and public libraries through free access to a computer and the internet; and~~

~~vi. CBC will also ensure that all the relevant evidence base documents are accessible online.~~

~~REGULATION 12 – 13 STAGE~~

~~4.3 Regulation 12 is the only consultation stage for SPDs although there can be more than one phase at the discretion of CBC. This stage provides an opportunity to influence the direction of the SPD.~~

~~4.4 Responses received on social media (twitter and Facebook for example) will not be considered as formal representations in relation to consultations. Consultation responses will be made publicly available in full.~~

~~[10] The Town and Country Planning (Local Planning) (England) Regulations 2012~~

~~5.~~4. PLANNING APPLICATIONS AND RELATED APPLICATIONS

Introduction to Planning Applications and related applications

~~5.1~~4.1 Development management is the “process whereby a local planning authority receives and considers the merits of a planning application and whether it should be given permission having regard to the development plan and all other material considerations”[10]~~[11]~~. Whilst the focus for community engagement in planning is at the plan making stage, as part of the process to determine these applications, it is important that community have the opportunity to have their say. Whilst planning applications are the main type of applications, there are other types of applications including listed buildings and tree applications.

Formatted: Superscript

~~5.2~~4.2 Planning applications usually consist of stages:

i. Pre-application discussions between the applicant and CBC. However, this is not a public matter;

ii. Pre-application public consultation by the applicant which, whilst not usually mandatory[11]~~[12]~~, is strongly encouraged by CBC;

Formatted: Superscript

iii. Submission of the planning application;

iv. Publicity and consultation by CBC on the planning application;

v. Determining the application and making the decision available; and

vi. Discharging planning conditions where relevant.

Pre-application Discussions

~~5.3~~4.3 There is no requirement on CBC to consult during the pre-application stage. However, applicants for planning permission should consider consulting widely with the community at the earliest opportunity, particularly for major developments.

~~5.4~~4.4 The NPPF, under the heading of ‘Pre-application engagement and front-loading” sets out the advantages of early engagement. Paragraph ~~40~~41 states *“Local planning authorities have a key role to play in encouraging other parties to take maximum advantage of the pre-application stage. They cannot require that a developer engages with them before submitting a planning application, but they should encourage take-up of any pre-application services they offer. They should also, where they think this would be beneficial, encourage any applicants who are not already required to do so by law to engage with the local community and, where relevant, with statutory and non-statutory consultees, before submitting their applications”.*

---

[10]~~[11]~~ From the glossary on the Planningportal

Formatted: Superscript

~~[12]~~ [11] Exceptions include the installation for the harnessing of wind power for energy production subject to certain criteria

Formatted: Superscript

~~5.5~~4.5 CBC encourages all potential applicants to discuss their proposals with CBC and all other relevant statutory and non-statutory bodies before submitting their planning application. CBC have produced a Planning pre-application services~~'~~ (April 2026) Guidance Note ~~Planning: Pre-Applications Services Guidance Note' (October 2022)~~, which, amongst other aspects, sets out the benefits of seeking pre-application advice as well as the fee schedule.

The Planning Application

~~5.6~~4.6 Once a planning application has been found to be valid, details of the application, including the application form, plans and accompanying documents are placed on CBC's website.

~~5.7~~4.7 Notifications giving links to further information about planning applications are sent to consultees with a request for their comments. CBC will consult statutory consultees as required by the Town and Country Planning (Development Management Procedure) (England) Order (DMPO) 2015 (as amended) , Planning (Listed Buildings and Conservation Areas) Act 1990 (as amended), and where relevant the Town and Country Planning (Environmental Impact Assessment) Regulations 2017 (as amended) and may consult other non-statutory consultees depending on the type, nature, scale and location of the proposed development.

~~5.8~~4.8 CBC is required by law to bring all planning applications to the attention of the public. The Council must accord with the methods of publicity specified in the DMPO 2015 (as amended).

~~5.9~~4.9 The DMPO 2015 (as amended) requires CBC to use one or more of the following methods of community engagement dependent on the type, nature and scale of the application:

i. Public Notice(s) erected at the site;

ii. Notification letter to the local Parish Council(s);

iii. Advertisement(s) in a local newspaper; and

iv. Notification letters to neighbours.

~~5.10~~4.10 In addition, CBC will publish a 'weekly list' of planning applications and can be viewed on the Council's website via PublicAccess. Members of the public who have signed up via Public Access for application alerts will receive an email notification when tracked applications are progressed. Councillors will be notified where planning applications involve the negotiation of a Section 106 agreement in their Ward.

~~5.11~~4.11 Consultation on planning applications will only commence once the application has been validated in accordance with National Requirements and Local Requirements[12]~~[13]~~. A

~~13~~ 12 ~~Planning application forms and fees~~Planning application supporting information - Cheltenham Borough Council

Formatted: Superscript

Formatted: Font: 11 pt, Superscript

Formatted: Font: 11 pt

minimum period of 21 days for non-Environmental Impact Assessment (EIA) and a minimum of 30 days for EIA development will then be allowed for representations to be made. Certain types of applications will only require a minimum period of 14 days consultation, i.e. applications for permission in principle.

~~5.12~~4.12 For planning applications (where appropriate), neighbour notification letters will be sent to the occupiers of properties immediately adjoining the site. Depending on the context of the site, the Case Officer will review whether any wider notification is appropriate. Notification will be sent to the relevant Parish Council clerk for the area where the development proposal is situated. Internal and external statutory consultees are also notified of relevant applications.

~~5.13~~4.13 For certain applications (such as major applications; applications for listed building consent; applications for developments affecting the setting of a listed building or a conservation area), a site notice is displayed as close as possible to the proposed development site and a notice will be placed in the local press.

~~5.14~~4.14 Representations must be submitted in writing either online via the Council's PublicAccess[13]~~[14]~~ website, letter or e-mail and will be recorded. The adopted Scheme of Delegation means that the majority of applications are determined under officer delegated powers. However, some complex or controversial applications may be decided at Planning Committee. Members of the public are advised that they may address the committee directly by registering to speak.

~~5.15~~4.15 When someone chooses to make comments on a planning application, CBC ask that they are made in timely manner and within the consultation period set. Any comments on planning applications should relate only to material considerations, which are matters that should be taken into account in deciding a planning application. Further information about material considerations can be found on the Government's PPG[14]~~[15]~~ and the Planning Portal[15]~~[16]~~. All comments must contain the name and address of the author, and we cannot consider anonymous comments.

~~5.16~~4.16 Any material changes to the submitted application may result in a re-notification or re-advertisement of the application. This will include notifying all those members of the public who sent in representations on the original proposals.

Determining the Application and Making the Decision

~~5.17~~4.17 Applications are determined under officer delegated powers or by members at

[13]~~[14]~~ ~~Planning applications - view and comment online~~ View and comment on planning applications - Cheltenham Borough Council

[14]~~[15]~~ The Government's Planning Practice Guidance (PPG) provides information on determining planning applications including what a material consideration could be

[15]~~[16]~~ The Planningportal gives an indication of what a material consideration could be

Formatted: Superscript

Formatted: Superscript

Formatted: Superscript

Formatted: Font: 11 pt, Superscript

Formatted: Font: 11 pt

Formatted: Superscript

Formatted: Superscript

Planning Committee through the adopted Scheme of Delegation. Information on the dates of Committees are available on CBC's website. Any representations from members of the public will be summarised in the Committee or Delegated Officer Report. Committee Reports and agendas are published on the Wednesday of the week before the Committee meeting (where taking place the following Thursday week) and will be available on the Council's website[16~~17~~].

Formatted: Superscript

Notification of Decision

~~5.18~~4.18 Copies of the decision notice will be sent to the applicant/agent and the decision will be available to view on CBC's website. Members of the public are not notified of the decision, but can view a copy of the decision notice and officers report on CBC's website.

Appeals

~~5.19~~4.19 Where an applicant chooses to appeal against the decision, CBC will notify all those who made representations on the original application on receipt of the appeal to provide an opportunity to make further representations if they so wish. There are three types of appeal; written representations, hearings and public inquiries. All appeals are dealt with by the Planning Inspectorate who will determine which route will be taken. Public inquiries are generally reserved for more complex applications where there is a lot of public interest. There is no third party right to appeal a planning decision.

Monitoring and Enforcement

~~5.20~~4.20 CBC is responsible for monitoring the planning permissions it has granted and for investigating any complaints about these developments. CBC is responsible for investigating alleged breaches of planning control and unauthorised development and will, if appropriate, take enforcement action. Where negotiation fails to resolve a breach of planning control or where a retrospective application would be inappropriate or is refused, CBC will consider whether to take formal enforcement action. CBC can serve legal notices to stop breaches of planning control, require unauthorised breaches of planning control to cease and require the removal of structures or buildings that do not have planning permission. Further details can be found in CBC's Local Enforcement Plan (Planning)[~~18~~17].

Formatted: Superscript

[16~~17~~] Planning Committee meeting dates, agendas and minutes

[17~~18~~] ~~Local Enforcement Plan (Planning)~~ Cheltenham Borough Council planning enforcement plan

Formatted: Superscript

Formatted: Superscript

Formatted: Font: 11 pt

Cheltenham Borough Council

Cabinet – Tuesday 14 July

Corporate Plan Year One Review

Accountable member:

Leader of the Council, Councillor Rowena Hay

Accountable officer:

Gareth Edmundson, Chief Executive

Ward(s) affected:

n/a

Key Decision: No

Executive summary:

The corporate plan is a key document that sets out the council's priorities and how success will be measured. The plan allows the council to set resources against agreed priorities and provides the framework to help prioritise future opportunities.

The Corporate Plan 2025 to 2028 has five key priorities and focuses on a number of key strategic activities which will be essential to deliver if significant progress is to be made against these priorities over the next three years. These actions are ones over which the council has significant control. The corporate plan also includes supporting key performance indicators for each of the five priorities as a way of measuring success.

This report presents a review of the progress made on the actions over the first year of the plan and an end-of-year performance report on the key performance indicators.

Recommendation: That Cabinet:

1. **Notes the review report and performance report to acknowledge the progress that has been made over the first year of the Corporate Plan 2025 to 2028.**

---

1. Implications

1.1 Financial, Property and Asset implications

There are no direct implications arising from this report.

Signed off by: Jon Whitlock, Head of Finance (Deputy S151 officer), jon.whitlock@cheltenham.gov.uk

1.2 Legal implications

There are no direct implications arising from this report.

Signed off by: Alison McKane, Interim Deputy Monitoring Officer, alison.mckane@cheltenham.gov.uk

1.3 Environmental and climate change implications

There are no direct implications arising from this review of the Corporate Plan. One of the key priorities in the plan is to reduce carbon, achieve council net zero and create biodiversity and the plan includes key actions to contribute to the delivery of this.

Signed off by: Maizy McCann, Climate Officer, Maizy.McCann@cheltenham.gov.uk

1.4 Corporate Plan Priorities

This report is a review of the key strategic actions which are contributing to the delivery of all the Corporate Plan Priorities:

- Securing our future
- Quality homes, safe and strong communities
- Reducing carbon, achieving council net zero, creating biodiversity
- Reducing inequalities, supporting better outcomes
- Taking care of your money

1.5 Equality, Diversity and Inclusion Implications

This report is a review of progress against an existing strategy together with an end of year performance report and therefore there are no direct implications.

1.6 Performance management – monitoring and review

A formal review report is presented to Cabinet on an annual basis, and progress is monitored as required through the year.

---

2 Background

2.1 The corporate plan is a key document that sets out the council's priorities and objectives and how success will be measured. The plan allows the council to set resources against agreed priorities and provides the framework to help prioritise future opportunities.

2.2 This report reviews progress made on the actions over the first year of the Corporate Plan and looks at performance against the strategic performance indicators accompanying delivery of the key priorities.

3 Corporate Plan 2025 to 2028 – year one review

2. Appendix 3 presents the full review report of progress made over the first year of the plan.

3.1 Highlights include:

- Progress made on the Golden Valley development. Construction of phase one of this flagship development is due to begin in early summer, which will deliver IDEA, the Innovation Centre, and ROUTER, the Mobility Hub. Social value targets for phase one construction have been agreed, and these will be formally incorporated into the building contract. These targets will be tracked and reported on.

- The Marketing Cheltenham team has continued to build strong relationships with partners to work on initiatives to encourage visitors and residents to participate in everything Cheltenham has to offer. There has also been a focus on digital marketing which has increased the number of social media followers and website sessions.

- The housing improvement programme continues to progress well, and we received positive feedback from the Housing Quality Network, which conducted a mock inspection. The purpose of having a mock inspection is to help us prepare for engagement with the Regulator of Social Housing.

- Seventy-four affordable homes were delivered during the year. Whilst this fell short of the target of 100 this was due largely to delays in completion of developments. The homes will still be delivered and will be added to the total number delivered in 2026/27.

- A Tree Strategy has been approved and published to establish policies for managing the tree stock owned by the council and we have also published our first Biodiversity Duty report.

- Key work has progressed around heritage including commissioning and engagement on the Conservation Area Review and development of the Heritage Action Plan in partnership with a wide range of partners across the voluntary sector.

- A number of sport-based organisations have been supported through rent support grants and grant agreements are now in place with local cultural organisations to support their ongoing sustainability, acknowledging the importance of these organisations to the town.

- We were unable to complete the sale of Gloucestershire Airport but continue to consider all options for the business and the site.

4 End of year performance report for 2025/26

4.1 The end of year performance report at Appendix 4 sets out performance against the key performance indicators we are using as a measure of success in delivering the five key priorities. These indicators help us to see whether we are making a difference.

4.2 Overall, performance is good, but there are some areas where performance could be improved. Below are some examples of the indicators reported on this year:

- Overall tenant satisfaction with council housing service provision is above target, with tenants valuing being treated fairly and with respect, being kept informed and having a safe home.

- Housing complaints have increased, but the volume remains low, and the vast majority of complaints are resolved at stage 1 of the complaints process.

- 99% of our council housing stock meets the Decent Homes Standard.

- We are now able to report on biodiversity net gain secured in the borough as this information is collected through the planning process.

- 81.4% of our homes have a measured or modelled EPC (energy performance certificate) rating of C or higher. Over the year, we have retrofitted 5% of our remaining homes with an EPC rating of D-or-below to achieve EPC C or higher.

- The Cheltenham Trust recorded over 935,000 visits to their venues in 2025/26 and held 301 free participation events. These figures will be used as a baseline for measuring performance in 2026/27.

- Collection of business rates and council tax is close to target, at around 98%. The team continues to work closely with businesses, to collect outstanding balances, and with customers who are struggling to pay due to cost-of-living difficulties.

5 Reasons for recommendations

5.1 Cabinet is asked to note the review report and performance report to acknowledge the progress that has been made over the first year of the Corporate Plan.

6 Alternative options considered

6.1 None. The Corporate Plan contains a commitment to present a formal review to Cabinet on an annual basis.

7 Key risks

7.1 The key risk in relation to the Corporate Plan is related to the delivery of the activities because if these are not delivered then the council will be unable to effect the change needed to meet its key priorities. This can be mitigated through monitoring and reporting of delivery to ensure the activities are being delivered and, if delivery is off track, to enable corrective action to be taken as far as possible.

Report author:

Gill May, Organisational Performance Lead, gill.may@cheltenham.gov.uk

Appendices:

1. Risk Assessment
2. Equality Impact Assessment – Screening
3. Corporate Plan 2025 to 2028: progress on actions at end of year one
4. End of Year Performance Report

Background information:

Corporate Plan 2025-2028.

Appendix 1: Risk Assessment

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
	If the council is unable to deliver the activities set out in the Corporate Plan then it will not be able to effect the change needed to meet the key priorities	Chief Executive	4	4	16	Reduce	Ensure delivery of the activities Undertake monitoring and reporting to ensure transparency and accountability and to enable corrective action if delivery is off track	Service areas responsible for delivery of strategic activities Organisational Performance Lead for monitoring and reporting	Ongoing

Appendix 2: Equality Impact Assessment (Screening)

1. Identify the policy, project, function or service change

a. Person responsible for this Equality Impact Assessment	
Officer responsible: Gill May	Service Area: Corporate Services
Title: Organisational Performance Lead	Date of assessment: 9 June 2026
Signature: [redacted]	

b. Is this a policy, function, strategy, service change or project?	Other
If other, please specify: This report is a review of progress in delivering the Corporate Plan together with a performance report.	

c. Name of the policy, function, strategy, service change or project	
Corporate Plan 2025 to 2028	
Is this new or existing?	**Other**
Please specify reason for change or development of policy, function, strategy, service change or project	
This report is a review of the progress made in 2025/26 to deliver the activities set out in the Corporate Plan together with a performance report.	

d. What are the aims, objectives and intended outcomes and who is likely to benefit from it?	
Aims:	N/A
Objectives:	N/A
Outcomes:	N/A

Benefits:	N/A

e. **What are the expected impacts?**	
Are there any aspects, including how it is delivered or accessed, that could have an impact on the lives of people, including employees and customers.	**No**
Do you expect the impacts to be positive or negative?	**No impact expected**
Please provide an explanation for your answer:	
This is a review of the first year of delivery of the Corporate Plan and the review has no direct impact.	

If your answer to question e identified potential positive or negative impacts, or you are unsure about the impact, then you should carry out a Stage Two Equality Impact Assessment.

f. **Identify next steps as appropriate**	
Stage Two required	**No**
Owner of Stage Two assessment	**N/A**
Completion date for Stage Two assessment	**N/A**

Corporate Plan 2025 to 2028: progress on actions at end of year one

The council's five key priorities for the period of this plan are:

- Key priority 1: Securing our future
- Key priority 2: Quality homes, safe and strong communities
- Key priority 3: Reducing carbon, achieving council net zero, creating biodiversity
- Key priority 4: Reducing inequalities, supporting better outcomes
- Key priority 5: Taking care of your money

The Corporate Plan is focused on delivering key strategic activities which will be essential to deliver if significant progress is to be made against these priorities over the next three years. These activities are ones over which the council has significant control. The activities are set out below and council officers have collated information on the progress made over the first year of the plan.

Key Priority 1: Securing our future

Action	Delivery timescale	RAG status	Progress update
We will begin the phase 1 construction process of the Golden Valley development, which will deliver the Innovation Centre, Mobility Hub and infrastructure.	By the end of year 1		The Council is currently in the process of discharging all conditions relating to its funding of these buildings and finalising a price with the building contractor. Construction is scheduled to begin in early Summer 2026.
We will agree clear social value targets for the Golden Valley project with the main contractor for phase 1 construction, which we will track and report on.	By the end of year 1		Following the April Social Value workstream meeting and consultation with partners, the Social Value Plan and KPIs for Phase 1 construction of the Golden Valley project were agreed. As of 21 April 2026, the final version was approved and will be formally incorporated into the Phase 1 construction building contract, covering the delivery of IDEA, the Innovation Centre, and ROUTER, the Mobility Hub.

Action	Delivery timescale	RAG status	Progress update
We will commence marketing parcels of land to housing developers to bring forward the residential element.	By the end of year 1		Marketing for the disposal of the Northern parcel is likely to commence in mid-June 2026, subject to approval by Full Council.
We will work in partnership with Gloucestershire County Council and other authorities to develop a Local Growth Plan for Gloucestershire and, in future years, we will support with delivery of the objectives and outcomes.	In year 1		Officers throughout the council supported the development of the Local Growth Plan for Gloucestershire. The plan sets out five core economic missions and brings together public sector partners, businesses, education providers, the voluntary sector, and local communities to create opportunities for Gloucestershire's residents. Through this shared commitment, the plan aims to unlock Gloucestershire's full economic potential, drive sustainable growth, and improve quality of life across every part of the county. The plan was adopted by Gloucestershire County Council at their Cabinet meeting on 22 April 2026.
We will create a Social Value Charter, which will form part of the lease for all Golden Valley occupiers and tenants.	By the end of year 2		As of 20 March 2026, the Social Value Charter was completed and endorsed by the Golden Valley Programme Board. It is now being incorporated into discussions with potential occupiers to clearly set out the expectations for social value delivery associated with occupation at Golden Valley. This is a live document and will be reviewed annually to ensure it continues to align with the Council's and Golden Valley's objectives.
We will commence construction of other commercial buildings on the development.	By the end of year 3		The developer, HBD, will focus on progressing the subsequent commercial buildings (INPUT and OUTPUT) once the Innovation Centre starts construction.
We will continue to promote Cheltenham as a vibrant and attractive destination for visitors and for businesses	Ongoing		The council has continued its focus on the marketing and promotion of Cheltenham as a destination for residents and visitors through the Visit Cheltenham brand. While there is still a place for printed marketing and other formats, digital marketing is still the primary industry method used to reach audiences. The continued focus on this aspect has seen

Action	Delivery timescale	RAG status	Progress update
through our dedicated Visit Cheltenham and Moving to Cheltenham websites.			an increase to 89,000 followers on social media. In addition, www.visitcheltenham.com ranks at the top of Google for searches for Cheltenham with 2.1 million website sessions in 2025. The Visit Cheltenham website was upgraded over the summer of 2025, and this is already seeing results with improved engagement and further promotional opportunities for businesses.
We will deliver a range of activities in partnership with Cheltenham BID and others to support the local economy.	Ongoing		The Marketing Cheltenham team has delivered effective marketing campaigns and engagement with businesses throughout the year to drive footfall, dwell time and spend in the town. Strong partnerships are in place with the BID and strategic visitor economy businesses, for example The Cheltenham Trust, Cheltenham Festivals and The Jockey Club, working on initiatives to encourage visitors and residents to participate in everything that Cheltenham has to offer. The town is one of the top regional destinations for shopping, leisure, and hospitality. In 2024 (figures are released in October for the previous year), Cheltenham welcomed 2,076,000 visitors - a slight increase on 2023. Those visitors spent £191,873,000 – an increase of 5% on 2023.

Key priority 2: Quality homes, safe and strong communities

Action	Delivery timescale	RAG status	Progress to date
We aim to put all the requirements in place to be C2 compliant under the housing regulator's consumer standards ratings	By the end of year 1		We have concluded a self-assessment against the consumer standards and have developed an action plan to address any gaps. A mock inspection was conducted by the Housing Quality Network (HQN) which was positive and the feedback was that we are on track with our action plan. A number of follow on actions have been created within the action plan following recommendations from HQN which we are now working towards implementing.

Action	Delivery timescale	RAG status	Progress to date
			Ongoing work is being carried out to ensure that we are meeting the safety quality standards; this is reviewed on a monthly basis.
We will complete a stock condition survey of all our residential properties.	By the end of year 1		At 29th May 2026 79% of our dwelling stock had been surveyed, 98% of our communal blocks and 92% of our garage blocks. We will continue to survey homes using in-house building surveyors. An article in the Tenant Voice newsletter and social media campaign planned for July 2026 will hopefully encourage more tenants to book an appointment. We will also be auditing the quality of the data received from the in-house surveyors. The surveys undertaken by the contractor have already received this validation. Where possible the survey will be combined with another visit to the property such e.g. when undertaking a repair or gas service inspection.
We will complete development of our first housing asset management strategy.	In year 2		A draft Asset Management Strategy was presented to Cabinet Housing Committee in June 2026 and will now go out for tenant consultation with a finalised version to be completed by the end of the year.
All senior housing staff will achieve a relevant housing qualification.	By the end of year 3		A training needs matrix has been developed, and relevant posts have been identified. Some staff have already commenced and/or completed their qualifications.
We will complete our housing improvement programme and aim to have all the requirements in place to achieve a C1 rating.	By the end of this plan		Our Consumer Standards Improvement team is now well established, and a project lead is in place. We have completed two self-assessments against the consumer standards in the past year. The Improvement Programme continues to progress well, with the programme now comprising 304 actions following incorporation of the Rent Standard action plan. As at May 2026, the programme is currently 69% complete overall. Governance and reporting arrangements are now embedded through regular oversight by the Housing Improvement Board and Cabinet Housing Committee.

Action	Delivery timescale	RAG status	Progress to date
We will continue our housing investment plan and will deliver a net gain in the number of council properties available for rent, ensuring new homes reflect local needs.	Over the next three years		The council is continuing to invest in new homes with developments at Regent's Village (working with Persimmon) and at 320 Swindon Road. These developments will bring forward 94 new affordable homes. The former Monkscroft School site has obtained a resolution to grant planning permission, subject to agreement of a Section 106, and construction of 70 new homes could begin this year. Against our target of delivering 100 affordable homes during 2025/26, 74 affordable homes were completed. Shortfalls against the delivery target reflect delays in completions at Regents Village (CBC) and Greenway Chase (Shurdington Road, Cottsway) – although intensive work is underway at both sites to address snagging issues. These homes will still be delivered, but their delivery will now be added to the total number of affordable homes expected to be delivered in Cheltenham during 2026-27. Additionally, a pause in the council's acquisitions programme also impacted anticipated completions.
We will retain our Purple Flag status for managing our evening and nighttime economy.	Ongoing		Purple Flag status was retained for 2025/26 and has been retained again for 2026/27 for an 11th consecutive year. The nationally recognised Purple Flag award is given to towns and cities that have an appealing, safe and welcoming evening and night-time economy (ENTE).
Over the course of this plan, we will develop a Cheltenham Gloucester and Tewkesbury Strategic and Local Plan in line with the published local development scheme timetable.	Ongoing		Extensive work has been undertaken including: • Preparing and commissioning the technical evidence to support plan making • Ongoing Regulation 18 engagement: Spatial Options and Key Policy Areas • Draft policy formulation and site assessments Given the complexity of plan making a review of key milestones is underway and the Local Development Scheme being reviewed in the context of this. This has informed the RAG rating of amber.

Action	Delivery timescale	RAG status	Progress to date
			Key work has progressed around heritage including commissioning and engagement on the Conservation Area Review and development of the Heritage Action Plan in partnership with a wide range of partners across the voluntary sector. This work will inform elements of the Strategic and Local Plan.

Key priority 3: Reducing carbon, achieving council net zero, creating biodiversity

Action	Delivery timescale	RAG status	Progress to date
We will prepare a tree strategy, which will establish policies for the management of tree stock owned by the Council, feed into local planning policy and help deliver against our climate commitments.	By the end of year 1		This was completed within timescale. The Tree Strategy was formally approved by Cabinet and published February 2026.
We will produce an action plan for Suitable Alternative Natural Greenspace, meeting our obligations to the Cotswolds Beechwoods Special Area of Conservation.	By the end of year 1		The draft of the action plan has been produced and reviewed with lead cabinet members. Agreed with lead Cabinet members to undertake some additional survey work to ensure robust baseline for financial modeling. Working with friends groups to undertake the survey work. Report will be presented to Cabinet September 2026 for approval. Engagement with Natural England has taken place as part of the drafting process.
We will publish our first Biodiversity Duty report.	By the end of year 1		Reporting follows a 5-year reporting cycle as required by the government. Cheltenham report published in March 2026: Biodiversity report - Cheltenham Borough Council. The next report will be due to be published no later than March 2031.

Action	Delivery timescale	RAG status	Progress to date
			In years 2 and 3 of this plan we will report on the actions we have taken to fulfil our biodiversity duty.
We will complete construction of the Innovation Centre at Golden Valley, which will be a low carbon building. As tenants move in, we will monitor operational carbon emissions and track this against our zero-carbon goal.	By the end of year 2		Construction is now forecast to complete in early 2028.
We will complete decarbonisation assessments of the key operational buildings owned by the Council.	By the end of year 2		Good progress has been made since the new Climate & Decarbonisation Manager joined CBC in January 2026. Decarbonisation surveys have taken place at Ellenborough House and the Recreation (Leisure Centre) to date. We are awaiting outcomes and report for the latter and hope to seek funding to undertake some of the recommendations made, as and when opportunities become available, as well as building some of the recommendations into the planned maintenance programme. Larger items would be put forward as a business case with a view to these items being added to a future capital scheme.
We will fulfil our biodiversity net gain (BNG) obligations within the planning system.	Ongoing		This is an ongoing action. Following appointment of Senior Planning Ecologist in last quarter, this role is fully embedded within the planning team working across: • Implementation of validation requirements and standard conditions to ensure consistent application of BNG across planning decisions. • Strengthening internal processes for assessing biodiversity metric calculations and monitoring delivery.

Action	Delivery timescale	RAG status	Progress to date
			• Continued engagement with applicants, agents, and ecological consultants to support compliance and improve scheme quality. • Development of approaches to secure off-site habitat delivery where on-site provision is not achievable.
We will use our housing investment programme to build low or zero carbon new homes.	Ongoing		The council's development at 320 Swindon Road is designed to a low carbon specification and all new opportunities are being considered with respect to their sustainability credentials. The former Monkscroft School site will also build low carbon homes that are compliant with the new Future Homes standard.
We will accelerate retrofit of our social housing as funding becomes available.	Ongoing		Good progress has been made since the new Climate & Decarbonisation Manager joined CBC in January 2026. The Warm Homes programme is progressing well, we will endeavour to make the best use of funding already obtained and look to obtain further funding as and when this becomes available. PSDS funding was removed by central government earlier this year which may have slowed progress.
Over the term of this plan, we will transition the council's fleet to electric vehicles where there are viable options and explore interim measures where viable options are not currently available.	Ongoing		The council's fleet is a mix of owned and leased vehicles. The majority of owned vehicles are run on hydrogenated vegetable oil (HVO) instead of diesel. A small percentage of the fleet is electric.

Key priority 4: Reducing inequalities, supporting better outcomes

Action	Delivery timescale	RAG status	Progress to date
We will review and revise our policies for managing the community assets owned by the Council.	In year 1		There are a small number of sports-based organisations that have sought rent support grants under the current third sector policy; Saracens FC, Leckhampton Rovers FC and Whaddon United FC. The assessments and recommendations have now all been signed off by Cabinet. The over-arching third sector policy is being reviewed and will be brought forward to Cabinet for approval later this year.
We will develop a long-term strategy for leisure and culture and start the process of re-procuring our leisure and culture services to safeguard these services for the long term.	Over the next three years		The council has over-arching strategies in place covering physical activity & sports and culture which provide a broad framework. In addition, Max Associates have undertaken a study of potential options for Leisure At / Prince of Wales stadium. The outcomes from the options study have informed initial discussions with an internal officer group. A project board has been established to review the best options for the end of the leisure and culture services contract when it comes to an end in 2029. This workstream will continue to be progressed in 2026/27.
We will track the level of investment made by our partners in our services and initiatives.	Over the next three years		No Child Left Behind successfully secured over £10k in commercial sponsorship in 25/26. Positive working meeting held with Galliford Try, the contractor appointed to deliver early site works for improvements to M5 Junction 10, connecting them with local partners who could benefit from social value contributions arising from Junction 10.
We will continue to provide grant funding, agreeing clear measures of success with grant recipients to ensure this funding is directed to best effect.	Over the next three years		In 2025/26, grant agreements were agreed for key cultural organisations who contribute positively to cultural and community life in Cheltenham. These continue to be reviewed on an annual basis to ensure that key performance indicators are met and that the outputs contribute positively to the delivery of the corporate plan. In 2026/27, the Council will be looking to relaunch its community pride and neighbourhood CIL grant rounds and the due diligence toolkit will be used to review grant applications.

Key priority 5: Taking care of your money

Action	Delivery timescale	RAG status	Progress to date
We will complete the sale of our share of Gloucestershire Airport, generating capital receipts for investment in service delivery.	By the end of year 2	Amber	Sale to Horizon Aero Group collapsed due to loss of equity investor interest. Now considering all options for the business and the site, with aim of securing financially sustainable solution by end of Year 2, delivery timescale updated.
We will complete the sale of the Municipal Offices, generating capital receipts for investment in service delivery.	By the end of this plan	Amber	The delivery timescale for completing the sale of the Municipal Offices has been updated and the aim is to complete the sale by the end of this plan (anticipated completion 2028, subject to planning). The council is now in a period of exclusivity with the bidder to progress the sale and the preferred bidder is gathering information to support them with their planning application.
We will relocate to alternative accommodation, which improves services for residents and is more efficient to run.	By the end of this plan	Amber	Several workstreams have been identified, a Project Initiation Document (PID) written, and the Senior Responsible Officer (SRO) and Project Manager will be agreeing the scope in Summer 2026. We continue to monitor the sales project and streamline our workspace to ensure a smooth and efficient transition to a new location.
We will rebuild the Housing Revenue Account balance back to the target of £1.5m.	By the end of this plan	Red	New staff are still in their first annual cycle of Budget Setting, Management, Year End accounting and Audit of the housing revenue account. Once practices and processes have been updated and are working effectively, we will be able to make a more information assessment of the deliverability of this action.
Over the course of this plan, we will reduce the budget gap year-on-year over the medium-term financial strategy period.	Ongoing	Amber	The forecast reduction in the budget gap over the medium term is significantly reliant on the successful delivery of planned savings from 2026/27 onwards. Activity is underway across all four savings pillars to develop and implement these proposals. Nevertheless, budgetary pressures are beginning to emerge in 2026/27, most notably in relation to interest rates and utility costs, which present a risk to the financial outlook.

Action	Delivery timescale	RAG status	Progress to date
We will continue to work with our partners Gloucester and Tewkesbury, through the Community Infrastructure Levy Joint Committee, to ensure funding is appropriately allocated to both neighbourhood and strategic schemes. We will also oversee the schemes and be responsible for appropriate monitoring and governance of the funding awarded.	Ongoing		Community Infrastructure Levy (CIL) Joint Committee is meeting as required to facilitate the award of CIL funds and ensure effective monitoring. All papers and decisions can be viewed here. During 2025/26 focus was on delivery of key schemes, this included facilitating funding for M5 Junction 10 and Combined Waste and Recycling Depot for Cheltenham and Tewkesbury Borough Councils (feasibility) split equally from the local infrastructure fund proportion. Infrastructure list updated as part of Cabinet approvals of the Infrastructure Funding Statement (December 2025). Last meeting of the CIL Joint Committee was 4 February 2026, this included re-evaluation of M5 J10 bid: • Agreed allocation of currently unallocated CIL of £4,054,141 • Agreed to ringfence up to a maximum of £20m (including the £4,448,369.66 allocation on 25 September 2025 and the £4,054,141 set out above) with specific allocations of any such sums being brought back to future meetings of the CIL Joint Committee for consideration; and, regular monitoring continue to be reported to the CIL Joint Committee and, should the 75% portion of the Infrastructure Fund not reach the anticipated levels within the report within the project delivery timescale, further consideration be given as regards the portion of Infrastructure Fund currently ringfenced for allocation to local strategic infrastructure projects. The meeting on 4 February also agreed to prepare for a new CIL infrastructure fund bid round. This became live June 2026 and details can be found here. The CIL Joint Committee will consider all bids received and make decisions on allocations by end 2026.

Action	Delivery timescale	RAG status	Progress to date
We will engage with all our Gloucestershire partners on progressing the aim of moving to a new operational depot site to deliver waste and recycling and other environmental services.	Ongoing		Consultants have been engaged to update a feasibility study and cost/permitting estimates to support a formal decision as part of the action plan outlined above. This work is due to be completed in June 2026. CIL monies have now been allocated to resource this work getting to the formal decision stage. Regular meetings have taken place with the consultant.

Appendix 4

End of Year Performance 2026

The Corporate Plan includes supporting key performance indicators for each of the five key priorities as a way of measuring the impact of activities. The table below illustrates performance over the first year. Note, some of the performance indicators will only be reported on as the linked activities are brought forward.

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
Key priority 1: Securing our future									
Employment rate (percentage of economically active people in employment) (Source: nomisweb)	Annual	Baseline: 80.1% (Apr24-Mar25)	Up	N/A	N/A	N/A	81.7% (Jan25-Dec25)		
Jobs created through Golden Valley development Jobs created as a direct outcome of Golden Valley through Phase 1 Construction. Data to be broken down into: - Number of local jobs created - Total number of jobs created	Annual		Up	N/A	N/A	N/A	N/A	N/A	Phase 1 construction is currently scheduled to commence in summer 2026. Once phase 1 construction begins, Bowmer + Kirkland, the contractor appointed to deliver phase 1, will be reporting monthly on KPIs which will include number of jobs created which can be broken down in local recruits and total number.
Through Phase 1, the Social Value benefits delivered – activities delivered; value quantified	Quarterly	N/A	Up	N/A	N/A	N/A	N/A		Following the April Social Value workstream meeting and consultation with partners, the Social Value Plan and KPIs for Phase 1 construction of the Golden Valley project were agreed. As of 21 April 2026, the final version was approved and will be formally incorporated into the Phase 1 construction building contract, covering the delivery of IDEA, the Innovation Centre, and ROUTER, the Mobility Hub.

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
Number of Innovation Centre tenants with no previous presence in Cheltenham *(note: reporting of this indicator is tied to the completion of the IC)*	Annual		Up	N/A	N/A	N/A	N/A	N/A	Completion of Phase 1 construction is scheduled for 2028, and reporting for this indicator will not commence until 2028, when tenants begin occupying the buildings.
Direct visitor spend	Annual	Baseline: £183.76m (2023)	Up	N/A	N/A	£191.87m (2024)	N/A		2024 data is the latest data, released October 2025. Shows a 5% increase in spend compared with 2023.
Percentage of vacant space available in council-owned investment properties at each reporting date	Quarterly	Baseline: 10% Target: Nil	Down	6.31%	6.31%	5.97%	5.97%		5.02% of vacancies at Ellenborough House. Overall trend is down.
Key priority 2: Quality homes, safe and strong communities									
Overall tenant satisfaction with council housing service provision	Quarterly	Baseline: 80% (Acuity annual report 2024/25)	Up	79%	82%	84%	82%		Q1: Highest satisfaction levels were for 'treats tenants fairly and with respect' and 'keeping tenants informed'. Q2: Highest satisfaction levels were for repairs in the last 12 months and 'having a safe home'. Q3: Highest satisfaction levels were for 'having a safe home', 'time taken for repairs' and 'being kept informed'. Q4: Highest satisfaction levels were for 'being treated fairly and with respect' and having a 'safe home'.
Number of housing complaints received	Quarterly	Baseline: 244 (cumulative total for 2024/25)	Down	66	84	76	77		Total for the year is 303. These complaints range from varied service departments including repairs, planned maintenance, ASB and tenancy management. These are managed within our 2-stage complaint process and with guidance from the Housing Ombudsman Code.

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
Percentage of complaints resolved at Stage 1 of the complaints process	Quarterly	Baseline: 76% (Q4 of 2024/25)	Up	83.90%	92.59%	89%	92%		Q1: 62 stage 1 complaints were responded to and 10 were escalated to stage 2 in the period Q2: 81 stage 1 complaints were responded to and 6 were escalated to stage 2 in the period Q3: 71 complaints were responded to and 8 were escalated to stage 2 in the period. Q4: 75 complaints were responded to and 6 were escalated to stage 2 in the period.
Number of maladministration judgements by Housing Ombudsman	Annual	Target: 0		0	1	0	0		This is a static figure with 1 service failure identified by the Housing Ombudsman in 2024/25 and 1 in 2023/24. In relation to the number of complaints that are raised with CBC Housing Services, low numbers of complaint cases are being escalated to the Housing Ombudsman Service.
Number of antisocial behaviour cases opened per 1,000 homes (council owned properties)	Quarterly	Baseline: 14 (cumulative annual figure for 2024/25)	Down	2.56	3.81	3.61	5.52		Cumulative total for year is 15.5. Whilst there has been a marginal increase, it is not at a concerning level. The ASB team have worked hard on promoting their service to all tenants, it has been made more accessible for reporting and as a result this has seen an increase, tenants are now feeling safe and empowered to contact the team and report cases.
Overall leaseholder satisfaction – not currently collected as a KPI; see commentary.	Annual								At present the leaseholder satisfaction is indirectly monitored through our complaints process and through queries/disputes raised during the annual billing process. Our intention has been to introduce pulse surveys at

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
									various stages of the leaseholder journey via text messages. We initially trialled this during the acquisition stage but received no responses. We have now changed our survey method and have insight survey forms that can be e-mailed out – we are hoping this improves responses and allows as to gather more pertinent information than we can via text. We are currently issuing this new survey to leaseholders that acquired a property last year to gauge feedback on this stage of the service. We also have designed a section 20 consultation survey which is being presented to the leaseholder's forum in July. Once approved this will be implemented to gauge feedback at a further and important pulse point.
Percentage of council homes meeting the decent homes standard	Annual	Baseline: 97% Target: 100%					99%		The Tenant Satisfaction Measure result for end March 2026 shows that 99% of homes meet the Decent Homes Standard.
Number of households on the housing waiting list	Annual	Baseline: 2,593 (end March 2025) Target: 2,800 (average)	Down	2,710	2,704	2,579	2,577		Aim to keep the number of households on the waiting list below the target figure. Quarterly figures are a snapshot at the end of each quarter. Average for the year is 2,643, which is under the target figure but, in reality, the number will go up. Reasons: lack of affordable housing options, and in particular, lower income households have been squeezed out of the Private Rented Sector due to government restrictions on Local Housing Allowance. Over the

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
									last financial year most of the growth has been in silver and gold bands.
Main homelessness duty accepted	Quarterly	Target: 96 (cumulative)	Down	22	22	19	17		Total for the year is 80. We are within target as upward pressures on homelessness acceptances appear to be plateauing, as numbers are broadly in line with the previous financial year. The vast majority of acceptances relate to homeless families.
Affordable Homes consented (i.e. final planning permission granted) as a percentage of all qualifying residential development during the financial year. ('qualifying residential developments' means major development as defined within the latest NPPF, currently 10 homes or more.)	Annual	Baseline: 35%		N/A	N/A	N/A	59%		As of Q4 25/26, 190 homes out of a total 323 consented on developments that qualify for an affordable housing contribution have been secured via final planning permission.
Additional KPIs									
Number of households in emergency B&B accommodation	Quarterly	Target: 3	Down	7	3	1	2		Excellent performance owing to an 'alternatives to B&B initiative' with P3 (a charity and housing provider), with a block of shared accommodation in Cheltenham, and owned by P3, being used as emergency accommodation where possible. Similar arrangements also exist with YMCA.

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
Number of households in temporary accommodation	Quarterly	Target: 25	Down	16	17	15	26		Slightly off target, but the quality of temporary accommodation is good, with it being mainly comprised of CBC-owned furnished accommodation and other, quality emergency accommodation within Cheltenham. Challenges with void-management within CBC's social housing stock continue to put pressure on temporary accommodation.
Number of households whose homelessness has been prevented	Quarterly	Target: 350 (cumulative)	up	75	74	80	87		Total for year is 316. Preventing homelessness continues to be challenging as access into private rented accommodation in particular is extremely difficult for low-income households. This is in part as a result of the government's freeze on Local Housing Allowance while market rents continue to increase.
Number of rough sleepers	Quarterly	Target: 3	Down	10	14	5	7		This has been a challenging year, with high numbers coming onto the street with complex needs and a new supplier for Assertive Outreach winning the tender but having relatively little experience of working in the county previously. It has taken some time for this experience to develop, but the numbers during the second half of the financial year reflect an improving position. This situation is reflected across both urban areas in the county.

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
Number of Affordable Homes delivered	Quarterly	Target: 100 (cumulative)	up	15	14	23	22		74 affordable homes were completed in 2025/26, against a target of 100 affordable homes during the financial year. Shortfalls against this target came from Regents Village, Greenway Chase (Shurdington Road) and a temporary pause/slowdown of CBC's acquisitions programme. Work continues on both Shurdington Road (Miller, Cottsway) and Regents Village (Persimmon, CBC) to address outstanding snagging issues with the developers. Homes will still be delivered but will be added to total for 26/27.
Key priority 3: Reducing carbon, achieving council net zero, creating biodiversity									
Biodiversity Net Gain (BNG) secured	Annual	N/A - new indicator	up	N/A	N/A	N/A	1.68 units habitats delivered 0.57 hedgerow units delivered	N/A	Figures are the total for the year.
Council carbon footprint	Annual	Baseline: 23,855.06 tco2 (2023-2024)		N/A	N/A	54%	N/A		This is the percentage by which carbon footprint was reduced in 24/25 from previous year. Q3 is reporting period. There is an evident reduction in scope 1 emissions, those relating to fossil fuels. Emissions relating to purchasing of good and services is the highest source of total emissions (which is common practice), calculation methodology and the approach to

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
									address these supply chain emissions remains a more nascent area for development. As we start to utilise different tools and methodologies, numbers are likely to continue fluctuating, please find more information in the full council report published in December 2025.
Number of operational properties assessed for decarbonisation	Annual	Not set		0	0	0	2		Lack of resource and funding. However, assessments have been undertaken for Ellenborough House and the Recreation (Leisure) Centre.
Percentage of council-owned social housing properties with a measured or modelled EPC (energy performance certificate) rating of C or higher.	Annual	N/A – new indicator					81.4%	N/A	This percentage will be used as the baseline for reporting in 26/27.
Percentage of remaining EPC D-or-below properties retrofitted to EPC C or higher.	Annual	N/A – new indicator					5%	N/A	Retrofit works must comply with PAS 2035 standards, which can make delivery time-consuming. The scope and progress of these works are further influenced by the availability of external funding and the rate at which we are able to gain access to tenanted properties through effective resident liaison and engagement.
Percentage of electric vehicles within fleet	Annual	N/A – new indicator					4.5%	N/A	This percentage will be used as the baseline for reporting in 26/27. The council uses a mix of owned and leased vehicles. Whilst the percentage of electric vehicles is low, the majority of council owned vehicles are run on hydrogenated vegetable oil (HVO) instead of diesel.
Key priority 4: Reducing inequalities, supporting better outcomes									

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
Level of investment made in our leisure and culture assets and services by us and by funding bodies • Capital works • Maintenance	Annual	N/A - new indicator					 640,224 441,844	N/A	No baseline as this is a new indicator. Capital works undertaken include decarbonisation of Leisure@; Cheltenham Trust Income Generating Modernisation Works; Town Hall Kitchen Ventilation; Floor Strengthening at the Pump Rooms.
Donations and sponsorship received by the No Child Left Behind initiative	Annual	Baseline: £3,616 Target: £6,000	up				£10,100		3,300 for Party in the Park, 6,800 for the awards.
Number of programmes and initiatives supported by No Child Left Behind (NCLB)	Annual	Baseline: 6					8		Party in the Park, NCLB awards, Cambray carnival, youth cafe, Literature Festival, Holiday Activities and Food programme, youth pass, Year of Action.
Global visitor numbers to our leisure and culture assets (The Cheltenham Trust)	Annual	N/A - new indicator					935,363	N/A	This year's figures will be used to set a baseline for 26/27.
Number of concession memberships taken out at Leisure@	Annual	N/A - new indicator					452	N/A	This year's figures will be used to set a baseline for 26/27.
Free participation events held by our leisure and culture service provider	Annual	N/A - new indicator					301	N/A	This year's figures will be used to set a baseline for 26/27.
Key priority 5: Taking care of your money									
Cumulative percentage savings achieved against agreed budget	Quarterly	Target: Q1 25.00% Q2 50.00% Q3 75.00% Q4 100.00%	Up	64%	52%	33%	19%		Anticipated savings fell away through the year, primarily due to the collapse of the sale of the airport.
Business rates collection rate	Quarterly	Target: Q1 33.30% Q2 58.70% Q3 83.80% Q4 97.50%	Up	33.48%	58.05%%	83.39%	97.19%		The Q4 annual collection rate is slightly below target. This can mostly be attributed to non-payment by one large business ratepayer and a recent bill being issued for a substantial new business property. The team continues

Key performance indicator	Reporting frequency	Baseline or target	Target dir.	Q1	Q2	Q3	Q4	RAG status	End of year commentary / notes
									to work with businesses to collect outstanding balances.
Council tax collection rate	Quarterly	Target: Q1 29.30% Q2 56.70% Q3 65.90% Q4 98.20%	Up	29.32%	56.55%	83.80%	98.01%		The Q4 annual collection rate is very slightly below target. The team continue to work with those customers struggling to pay in the current cost of living difficulties.
Rent and service charge collection rate	Quarterly	Target: Q1 99.25% Q2 99.25% Q3 99.25% Q4 99.25%	n/a	99.32%	99.88%	95.47%	114.38%		2025/26 Year to Date collection 102.03%. Q4 is above 100% because the figures account for current and former rent.
Number of initiatives supported by the Community Infrastructure Levy	Annual								See narrative in review report. Also reported separately/monitored via Community Infrastructure Joint Committee

Cheltenham Borough Council

Cabinet 14 July 2026

Cheltenham Town Centre and Vacant Units Action Plan update

Accountable member:

Cllr Izaac Tailford, Cabinet Member for Economic Development, Culture, Wellbeing and Public Realm

Accountable officer:

Helen Mole, Head of economic development, comms and marketing

Ward(s) affected:

Town Centre - All Saints, College, Lansdown, St Paul's, Pittville

Key Decision: No

Executive summary:

Cheltenham town centre boasts a unique mix of Regency architecture, independent retailers and High Street names, alongside a vibrant and award winning food and drink scene. Throughout the year, the town centre plays host to many major festivals and events that attract hundreds of thousands of visitors, as well as providing residents with an important space for community interaction and civic activity.

Like many towns across the UK, Cheltenham is faced with a growing number of challenges, including changing retail patterns, rising business costs, and social and environmental issues. The council recognises all of this and is prioritising the vitality and resilience of the town centre through a programme of activities which are set out in this report.

Recommendations: That Cabinet:

1. **notes the work underway by the council and partners to support the town centre and its businesses.**

2. **notes the report updating on progress against delivery of the vacant units action plan to date.**

---

1. Implications

1.1 Financial, Property and Asset implications

All activities within this report are covered by existing budgets or have no financial implications. If a High Street Rental Auction is undertaken in the future, there will be costs associated with this, which will be subject to separate approval process.

Signed off by: Ela Jankowska – Finance Business Partner
ssssssssssss**Date:** 23.06.206

1.2 Legal implications

If the full High Street Rental Auctions process is undertaken in the future, this will require a thorough legal review and process implemented. At present, no further legal implications arising from this report.

Signed off by: Alison McKane, Interim Deputy Monitoring Officer

1.3 Environmental and climate change implications

A climate change impact assessment was carried out for the vacant units action plan at implementation. No further environmental and climate change implications arising from this report.

Signed off by: Maizy McCann, Climate Officer Maizy.mccann@cheltenham.gov.uk

1.4 Corporate Plan Priorities

This report contributes to the following Corporate Plan Priorities:

- Securing our future

1.5 Equality, Diversity and Inclusion Implications

See below.

1.6 Performance management – monitoring and review

The vacant units action plan was created following consultation and engagement with stakeholders, setting out actions, timescales, owners and outcomes. These are monitored via reports to the council's leadership team and members.

2 Background

2.1 Cheltenham town centre plays a critical role in the town's economy. The town supports a diverse mix of retail, hospitality, cultural venues and professional services, contributing significantly to local employment and business growth. The town centre boasts a unique mix of Regency architecture, independent retailers and High Street names, a vibrant food and drink scene, as well as many major festivals and events that attract visitors from across the UK and beyond.

2.2 Beyond its economic contribution, the town centre provides an important space for community interaction and civic activity. A thriving and well-maintained centre supports wellbeing, encourages footfall and investment, and underpins confidence in the wider local economy. Ensuring its continued vitality is therefore essential not only for businesses, but also for residents, visitors, and the long-term prosperity of Cheltenham.

2.3 Town centres across the UK are undergoing a period of significant structural change, driven by evolving consumer behaviour, the growth of online retail, and wider economic pressures. The traditional retail-led model is evolving into a more mixed-use offer, where leisure, hospitality, culture, and services play an increasingly important role. This transition presents both opportunities and challenges, as places must adapt quickly to remain relevant, attractive and economically viable.

2.4 Cheltenham is not immune to these national trends. Businesses in the town centre continue to face cost pressures, including increases in nationally set business rates, rising energy costs and the ongoing effects of the cost-of-living crisis, all of which have impacted both consumer spending and business resilience. At the same time, changing patterns of work and footfall, particularly since the pandemic, have required businesses to adapt their offer and operating models.

2.5 In addition to economic challenges, there are wider social and environmental issues that influence perceptions of the town centre. Rough sleeping and vulnerability, or anti-social behaviour, for example, are complex issues seen across many town centres that require a coordinated, partnership-based response balancing enforcement with appropriate support.

2.6 The council recognises all of this and is prioritising the vitality and resilience of the town centre through a programme of activities which are summarised below.

2.7 Work to reduce the number of vacant shops

In September 2023, Cabinet approved the adoption of the Vacant Units Action Plan, committing to a focused and sustained effort to reduce the number and impact of vacant properties in the town centre.

This section sets out progress against key actions within the plan:

- **Vacancy rate:** 7.8% of town centre units are currently empty, slightly lower than this time last year, and well below the national average of c.14%, reflecting a comparatively resilient local position. This demonstrates the strong appeal of the town as well as the effectiveness of targeted interventions to support occupancy.

  The town has experienced some longer-term vacancies and officers have been working actively with landlords on these properties. A persistently vacant unit on the High Street is now being renovated for occupation, after engagement with the building owner by council officers.

  A key challenge is managing public perception of vacancy rates. While Cheltenham's vacancy rate is around half the national average, some empty units are in highly visible locations, which has a bigger impact. A current example of this is Cavendish House which, due to its size, prominent position, and strong public connection, has attracted national attention since becoming vacant. Planning officers are currently working with the building's owners on their proposals to bring it back into use. However, it is important to note that the council, as local planning authority, cannot direct when planning applications are submitted and is therefore reliant on landowners and developers to bring forward proposals in a timely manner.

- **Enforcement action:** The council has continued to take proportionate enforcement action where appropriate, including use of planning, environmental health and property-related powers to address long-term vacant and poorly maintained units.

- **Direct action on persistently vacant units:** High Street Rental Auction (HSRA) powers introduced through the Levelling Up and Regeneration Act 2023 enable local authorities to require the rental of persistently vacant high street premises, helping bring empty units back into productive use. This provides a new tool to support town centre regeneration, with the aim of reducing long-term vacancy rates.

  Before any rental auction can take place, the council must first consult upon and formally designate a relevant street on which the powers may be used, and the council will progress this during 2026.

  Subject to consultation, official designation of an area of the town centre will enable the next stage of the process through which the council can engage with landlords of eligible long-term empty commercial premises and, where voluntary action is unsuccessful, require the property to be let through a rental auction.

- **Work with landlords and letting agents:** Officers continue to engage proactively with landlords and agents to encourage letting activity, support realistic rental expectations and identify barriers to occupation. This includes direct outreach, introductions, and promotion of available units to prospective occupiers.

2.8 Promotion of Cheltenham locally, nationally, and internationally

The council has continued its focus on the marketing and promotion of Cheltenham as a destination for residents and visitors through the Visit Cheltenham brand. Strong partnerships are in place with Cheltenham Business Improvement District (BID) and strategic visitor economy businesses, for example Cheltenham Trust, Cheltenham Festivals and The Jockey Club, working on initiatives to encourage visitors and residents to participate in everything that Cheltenham has to offer.

The town is one of the top regional destinations for shopping, leisure, and hospitality. In 2024, Cheltenham welcomed just under 2.1 million visitors - a slight increase on 2023. Those visitors spent an estimated £191,873,000 – an increase of 5% on 2023 and the visitor economy supports around 4% of all employment.

The Visit Cheltenham website was upgraded over the summer of 2025, and this is already seeing results with improved engagement and further promotional opportunities for businesses.

Key statistics for Visit Cheltenham are:

- Visit Cheltenham has 89,000 followers on social media.
- 2.1 million website sessions on www.visitcheltenham.com in 2025.
- 80,000 printed Cheltenham guides distributed around the region in 2025.
- Fortnightly newsletter sent to c.45,000 subscribers.

Cheltenham is a partner in the Cotswolds Local Visitor Economy Partnership, recognised by VisitBritain and VisitEngland, which enables the team to showcase the town and surrounding region on a national and international stage, raising its profile and supporting the sustainability of the visitor economy into the future.

2.9 Public realm engagement

The council is working in partnership with Gloucestershire County Council and

Cheltenham BID to develop a shared vision that helps transform the high street making it even more welcoming. This can be achieved by better coordination of street design, layout, paving, lighting, trees and planting as well as signage, seating, accessibility and management including street repairs or cleansing.

This collaborative approach will ensure alignment between highway responsibilities, local business needs and wider place-making objectives.

Engagement activity was carried out via a survey which the public and local businesses were invited to complete. The public survey concluded on 10th July, and feedback will be reviewed and presented in due course.

More information is available here: Public engagement launched on future of Cheltenham - Cheltenham BID

2.10 Planning policy

Work on the Cheltenham, Gloucester and Tewkesbury Strategic and Local Plan (SLP) is underway. This emerging plan places a strong emphasis on the evolving role of city and town centres over the next 15 years, recognising the need for greater flexibility in how these spaces are used and developed.

The plan is likely to support diversification, active frontages, and the adaptive reuse of buildings to respond to changing retail and economic conditions.

This evolving policy approach refers to the vacant units action plan, as it supports the proactive reuse and repurposing of empty premises. By encouraging a broader mix of uses and reducing barriers to occupation, the plan provides a supportive foundation for bringing vacant units back into active use, helping to strengthen footfall, economic activity, and the overall attractiveness of centres.

The SLP will be available for consultation later this year in advance of being submitted to the Planning Inspectorate for independent examination.

2.11 Clean, safe, and welcoming

To support businesses and ensure a clean, safe, and welcoming environment in the town centre, officers across the council engage with partner organisations to carry out activities including:

- The achievement of Cheltenham's 11th Purple Flag accreditation. Similar in principle to the Blue Flag for beaches, the Purple Flag assesses qualities of diversity, vibrancy, accessibility, cleanliness and partnership working. With evidence assessed by independent experts, the continued achievement of this award gives positive reassurance to people planning a night out in the town.

- Through weekly multi-agency meetings, officers and partners proactively monitor, engage and support rough sleepers. This approach means that Cheltenham's rough sleeper numbers have, generally, remained low and substantially lower than our nearest urban centres.

- Deployment of mobile CCTV in areas suffering from anti-social behaviour and enviro-crime hotspots enables the council to proactively monitor areas and to be responsive to reports of emerging issues.

- Ongoing work to strengthen and improve Cheltenham's markets, via the Bill currently going through parliament, is delivered in recognition of the fact that markets play an important role in the cultural life and offer of the town. Officers work with existing businesses to maximise the potential of the markets to make a substantial contribution to economic growth, supporting footfall to the high street and wellbeing of the town.

- Support for the BID's new cleansing initiative which provides businesses in the BID zone with free, fast access to professional cleansing services such as graffiti removal, litter cleanup, and specialist removal of environmental contamination like spillages.

2.12 Recognising the value of our heritage

The council allocated funding via the UK Shared Prosperity Fund to support a collaborative project with local history societies and amenity groups to celebrate our heritage through the newly adopted Heritage Action Plan. This plan allows residents, businesses, visitors, and schools to gain a deeper understanding of our town, why we are here, and how our future heritage is developing.

This resource supports the role heritage plays as part of the vibrancy of our town centre, strengthening town centre identity, generating local pride and stewardship, and informing future development.

Further information can be found here:

- The Making of Cheltenham
- Cheltenham Heritage Action Plan
- Cheltenham Story
- Cheltenham Heritage Index

Officers are also currently undertaking a review of Cheltenham's conservation areas including the conservation area that covers the entirety of the town centre.

2.13 Conclusion

Cheltenham town centre remains a vital economic and social asset, demonstrating resilience despite ongoing national and local challenges. Through a comprehensive and partnership-driven approach, the council is actively supporting its continued vitality by reducing vacancies, enhancing the visitor economy, improving the public realm and maintaining a clean, safe and welcoming environment.

Alongside forward-looking planning policy and investment in heritage and place identity, these actions position the town centre to adapt to changing demands, attract investment and sustain its role as a vibrant, inclusive and prosperous heart of the community for residents, businesses and visitors alike.

3 Reasons for recommendations

Members are asked to note the above update on activity.

4 Consultation and feedback

4.1 There is ongoing engagement with town centre stakeholders, including Gloucestershire County Council, Cheltenham BID, Cheltenham Civic Society, Gloucestershire Constabulary, and more.

4.2 The creation of the action plan included engagement with key town centre stakeholders, property owners and landlords, and agents promoting the town centre.

4.3 Partnerships and community groups have evolved over time, with ongoing engagement maintained through a network of active and varied boards, forums and collaborative platforms.

5 Key risks

There are multiple factors influencing the success and vitality of the town centre, some of which can be managed or influenced by the council, but many of which are outside of the council’s control. Officers review the various factors and seek to take the most appropriate action in each case.

Report author:

Helen Mole, Head of economic development, communications and marketing

Appendices:

i. Risk Assessment
ii. Equality Impact Assessment – Screening

Background information:

Cabinet 19 September 2023

Cabinet 18 February 2025

Appendix 1: Risk Assessment

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
1	The range of actions needed to support the town centre's resilience relies on factors both within and beyond the council's control. If the council cannot influence or manage a required action, then there is a risk that outcomes may be limited.	All relevant officers	3	3	9	Mitigate	Officers to understand: - what can be delivered by the council - what can be influenced by the council - what is outside of the council's control Officers use this knowledge to focus activities and partnership relationships to maximise impact.	All relevant officers	Ongoing
2	If public and partners do not commit to or engage in the activities highlighted in this report, then it will lead to a lack of progress and achievement of the objectives.	All relevant officers	2	2	4	Mitigate	Town centre stakeholders are committed to supporting the town centre. Council officers continue to monitor and work with partners. Communication and promotion of the public facing activities is	All relevant officers	Ongoing

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
							essential to ensure engagement and awareness from members of the public.		
3	If media coverage is mostly negative about the town centre, it could harm how people perceive the town and lead to lower visitor, business and resident confidence, as well as making it harder to attract new business and investment.	All relevant officers	2	2	4	Mitigate	Press articles are issued about successes. Strong positive brand messaging from Visit Cheltenham and partners Council to share information about statistics to show the reality of the town centre (see note about vacancy rate vs perception of this)	All relevant officers	Ongoing

Appendix 2: Equality Impact AsPage 156 (Screening)

1. Identify the policy, project, function or service change

a. Person responsible for this Equality Impact Assessment	
Officer responsible: Helen Mole	Service Area: Economic development, comms & marketing
Title: Head of economic development, comms & marketing	Date of assessment: 23/6/26
Signature: *H Mole*	

b. Is this a policy, function, strategy, service change or project?	Service
If other, please specify:	

c. Name of the policy, function, strategy, service change or project	
Town centre support and vacant units action plan	
Is this new or existing?	**Other**
Please specify reason for change or development of policy, function, strategy, service change or project	
Update on existing activities	

d. What are the aims, objectives and intended outcomes and who is likely to benefit from it?	
Aims:	To highlight the work being carried out by the council and partners to support the town centre
Objectives:	To promote the town centre To support businesses To ensure Cheltenham is a safe and welcoming place to spend time
Outcomes:	Review of ongoing activity

Benefits:	A thriving and well-maintained centre supports wellbeing, encourages footfall and investment, and underpins confidence in the wider local economy. Ensuring its continued vitality is therefore essential not only for businesses, but also for residents, visitors, and the long-term prosperity of Cheltenham.

e. What are the expected impacts?	
Are there any aspects, including how it is delivered or accessed, that could have an impact on the lives of people, including employees and customers.	**No**
Do you expect the impacts to be positive or negative?	**No impact expected**
Please provide an explanation for your answer:	
The activities set out in this report will be subject to their own equality assessments. This report is updating on work being carried out.	

If your answer to question e identified potential positive or negative impacts, or you are unsure about the impact, then you should carry out a Stage Two Equality Impact Assessment.

f. Identify next steps as appropriate	
Stage Two required	**No**
Owner of Stage Two assessment	
Completion date for Stage Two assessment	

This page is intentionally left blank

Cheltenham Borough Council

Cabinet – 14 July 2026

Cultural Grant Awards for 2026-27

Accountable member:

Cllr Izaac Tailford, Cabinet Member for Economic Development, Wellbeing, Culture and Public Realm

Accountable officers:

Helen Mole, Head of economic development, comms & marketing

Richard Gibson, Head of communities, wellbeing & partnerships

Ward(s) affected: n/a

Key Decision: No

Executive summary:

This report asks Cabinet to agree a set of recommendations for the allocation of the council's cultural grants for the financial year 2026-27.

The cultural grants are a series of annual grants that are made to several cultural organisations in the town.

The recommendations set out in the report respond directly to the financial challenges currently faced by the council but also take into account the nature and contribution of the individual organisations.

Recommendations: That Cabinet:

- **approves the following cultural grant allocations for the financial year 2026-27:**

Holst Birthplace Trust (HBT)	Maintain grant amount of £7.5k for

	2026-27 and investigate options for entering into a contract for these services in the future.
Cheltenham Festival of Performing Arts (CFPA)	Maintain grant amount of £20k for 2026-27 but review for future years.
Cheltenham Arts Council (CAC)	Maintain grant amount of £5k for 2026-27 and continue to work with CAC to ensure that the allocation of their grants reflects the over-arching direction of the council
Gloucestershire Everyman Theatre	To reduce the amount of cultural grant awarded to the Everyman Theatre to £90k for 2026-27 and to £60k for 2027-28
Cheltenham Civic Society	Maintain grant amount of £2k for 2026-27

Implications

1.1 Financial, Property and Asset implications

The recommendations, if approved, will generate a new saving of £32.3k in 2026-27 and a further saving of £30k in 2027-28, giving an overall saving to the general funds of £62.3k in two years.

Signed off by: Ela Jankowska – Finance Business Partner
Date: 26.06.2026

1.2 Legal implications

1.2.1 The Council should enter into grant agreements with the providers which are based on the approved Small Grant Agreement for grants below £10,000 and the approved Standard Grant Agreement for grants of £10,000 and above.

1.2.2 Under the Subsidy Control Act 2022 (“the Act”) public authorities are allowed to award low-value subsidies (Minimal Financial Assistance “MFA”) to organisations without needing to comply with the majority of the subsidy control requirements under the Act. MFA has a financial threshold so no recipient can receive more than £315,000 over the applicable period. The applicable period is the elapsed part of the current financial year (that is, from 1 April), and the two financial years immediately preceding the current financial year.

Signed off by: Alison McKane Interim Deputy Monitoring Officer, alison.mckane@cheltenham.gov.uk

1.3 Environmental and climate change implications

There are no environmental or climate change implications envisaged as a result of the recommendations set out in this report.

1.4 Corporate Plan priorities

This report contributes to the following Corporate Plan Priorities:

- Key priority 4: Reducing inequalities, supporting better outcomes
- Key priority 5: Taking care of your money

1.5 Equality, diversity and inclusion implications

The equality quality impact assessment screening is attached as Appendix 2.

1.6 Performance management – monitoring and review

Each organisation will be expected to track its performance against a set of key performance indicators and present these in an annual report to the cabinet member.

---

2. Background

2.1 The council makes a significant financial contribution to the cultural and creative life of Cheltenham in the form of direct grants, rent support grants, contracted spend and in-kind benefits.

2.2 A total of £156,800 of discretionary cultural grants are provided by the council to cultural organisations in the town each year. As part of the discretionary service review and in line with the focus on cost savings for the council, an assessment of the grants has been undertaken. This report summarises key information for each cultural grant recipient, and highlights decisions taken and actions needed to support the wider savings programme.

2.3 This report covers discretionary cultural grants paid to the following organisations:

Recipient	Grant paid in 2025-26
Holst Birthplace Trust (HBT)	£7,500
Cheltenham Festival of Performing Arts (CFPA)	£20,000
Cheltenham Arts Council (CAC)	£5,000
Gloucestershire Everyman Theatre	£122,300
Cheltenham Civic Society	£2,000
Total of discretionary cultural grant	**£156,800.00**

3. Savings requirement for 2026/27

3.1 To ensure the achievement of the required £1.054m of savings during 2026/27, an approach consisting of four pillars has been adopted by the council:

- **Staffing establishment review -** reconciling the staffing budgets the council has set aside with the current workforce.
- **Base budget review -** consider information on spend trends over the last few years to identify potential savings across all budget lines.
- **Capital project and funding review -** consider how the council is funding projects and consider the profile of capital spending.
- **Discretionary service review -** consider how discretionary services meet corporate priorities. This is where the review of cultural grants sits.

It is vital that the council sets out a viable plan for delivering this budget reduction and work is underway across the council to put this in place.

4. Overview of recommendations:

Recipient	Summary	Grant paid in 2025-26	Recommendation	Grant to be paid in 2026-27	2027-28
Holst Birthplace Trust (HBT)	Annual grant paid in recognition that HBT took over the running of the museum from Cheltenham Borough Council in 2000 after the museum was closed due to budget cuts.	£7,500	Maintain amount for 2026-27	£7,500	To be agreed

Recipient	Summary	Grant paid in 2025-26	Recommendation	Grant to be paid in 2026-27	2027-28
	Although delivered as a grant, HBT provides a collections management service for CBC as well as managing their own collection.				
Cheltenham Festival of Performing Arts (CFPA)	The annual festival provides a platform to showcase the performing talents of local children and young people in music, dance and drama. Annual grant paid to offset hire charges for the Town Hall, the venue for the festival.	£20,000	Maintain for 2026-27. Expectation that the grant will reduce in 2027-28	£20,000	To be agreed
Cheltenham Arts Council (CAC)	Cheltenham Arts Council (CAC) is a membership-based organisation with members representing all branches of the arts: music, drama, visual arts, history, languages and literature. CAC use the funding from the council to distribute grants to smaller cultural organisations within Cheltenham.	£5,000	Maintain for 2026-27, but continue to work with CAC to ensure that the allocation of their grants reflects the over-arching direction of the council	£5,000	To be agreed
Gloucestershire Everyman Theatre	The Everyman lease the theatre from the council on a full repairing lease until 2061. The make-up of the grant to the Everyman is complex and reflects several historic decisions taken to support the Theatre.	£122,300	To reduce the amount of grant awarded to the Everyman Theatre over the next two years. The recommendation is made in recognition that the grant is the single largest grant that the council allocates, and that the Everyman has	£90,000	60,000

Recipient	Summary	Grant paid in 2025-26	Recommendation	Grant to be paid in 2026-27	2027-28
	The grant is used to primarily support the Theatre's education outreach work		access to a broad funding portfolio.		
Cheltenham Civic Society	To cover the printing costs of the Heritage Open Days brochure. Organised by Cheltenham Civic Society, Heritage Open Days celebrates local history, culture, and architecture by providing free access to places and experiences that are usually closed or charge admission.	£2,000	Maintain the grant	£2,000	To be agreed
Total		**£156,800**		**£124,500.00**	

5. Next Steps

5.1 Following agreement by Cabinet to the recommendations, new grant agreements will be entered into to cover the financial year 2026-27. The agreements will set out the outcome measures and key performance indicators.

5.2 The measures and KPIs will then be used as the basis of monitoring the performance of the grant recipients.

Report author:

Helen Mole, Head of economic development, comms and marketing

Richard Gibson, Head of communities, wellbeing and partnerships

Appendices:

Appendix 1 - Risk Assessment

Appendix 2 - Equality Impact Assessment – Screening

Appendix 3 – Details of individual organisations

Appendix 1: Risk Assessment

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
	If the Council reduces grants paid to cultural organisations, then there is a risk that the Council may receive negative feedback from the press, the public and the organisations themselves.	Helen Mole	3	3	9	Reduce	Sustain effective working relationships with cultural organisations to explain the council's position.	Richard Gibson	
	If the council does not reduce its discretionary outgoings then there is a risk that essential services may not be delivered	Adele Taylor s151 officer					Review all discretionary spend and put in place measures to manage this.	Adele Taylor	

Appendix 2: Equality Impact Assessment (Screening)

STAGE 1 – Equality Screening

1. **Identify the policy, project, function or service change**

a. Person responsible for this EqIA	
Officer responsible: Richard Gibson	**Service Area: Community, Wellbeing and Partnerships**
Title: Head of communities, wellbeing and partnerships	**Date of assessment: 23 June 2026**
Signature:	

b. Is this a policy, function, strategy, service change or project?	**Other**
If other, please specify: Reduction in discretionary grant	

c. Name of the policy, function, strategy, service change or project	
Reduction in discretionary grant	
Is this new or existing?	**New**
Please specify reason for change or development of policy, function, strategy, service change or project	
Reduction in discretionary grant	

d. What are the aims, objectives and intended outcomes and who is likely to benefit from it?	
Aims:	Reduce discretionary spend as part of wider corporate savings
Objectives:	Reduce discretionary spend
Outcomes:	Reduction in discretionary spend
Benefits:	Meeting corporate objectives

e. What are the expected impacts?

Are there any aspects, including how it is delivered or accessed, that could have an impact on the lives of people, including employees and customers.	No
Do you expect the impacts to be positive or negative?	No impact expected
Please provide an explanation for your answer:	
Promoting equality and tackling discrimination will remain the responsibility of the grant recipient, not the council.	

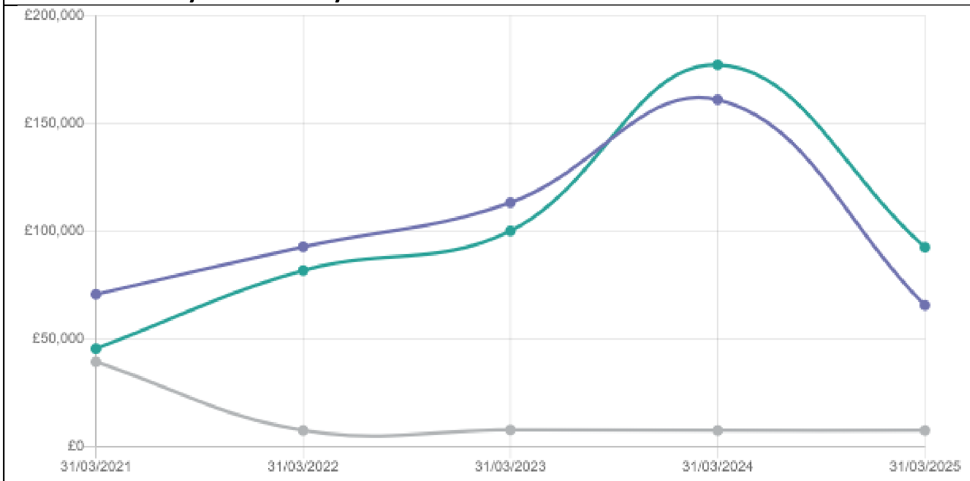
If your answer to question e identified potential positive or negative impacts, or you are unsure about the impact, then you should carry out a Stage Two Equality Impact Assessment.

f. Identify next steps as appropriate	
Stage Two required	**No**
Owner of Stage Two assessment	**N/A**
Completion date for Stage Two assessment	**N/A**

APPENDIX 3 – DETAILS OF THE INDIVIDUAL ORGANISATIONS

Holst Birthplace Trust (Holst Victorian House)	
Charity number	1078599
Grant amount 2025-26	£7,500
Funding requirements	To manage and develop the Holst Victorian House Museum as an attractive, viable, and sustainable cultural destination. This includes enhancing the museum's programme, building partnerships with schools and local community groups, and diversifying sources of support and income to strengthen long-term financial sustainability. To manage and conserve the council's Holst Collection, currently on long-term loan to the Holst Birthplace Trust, ensuring its long-term preservation and continued relevance. This will be achieved through professional conservation, environmental improvements, and interpretive enhancements that support public engagement and educational outreach.
Performance Measures	Protect, conserve and improve the Holst Collection. Attract visitors and improve the economic vitality of the town. Enhance the quality of life and wellbeing of Cheltenham residents through inclusive access to creative and cultural opportunities. Engage Cheltenham children and young people in positive activities that enrich their social and emotional development.

Financial history from Charity Commission



Income / Expenditure	31/03/2021	31/03/2022	31/03/2023	31/03/2024	31/03/2025
Total gross income	£70.66k	£92.66k	£113.20k	£160.98k	£65.58k
Total expenditure	£45.40k	£81.70k	£100.06k	£177.20k	£92.43k
Income from government contracts	N/A	N/A	N/A	N/A	N/A
Income from government grants	£39.30k	£7.50k	£7.75k	£7.50k	£7.50k

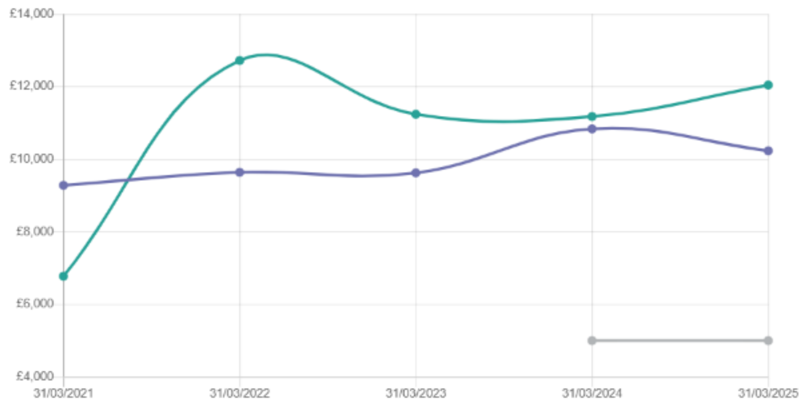
Cheltenham Festival of Performing Arts	
Charity number	1157550
Grant amount 2025-26	£20,000
Funding requirements	Deliver the annual Cheltenham Festival of Performing Arts event which has the following aims: *To provide a platform to showcase the performing talents of local children and young people in music, dance and drama via an annual performing arts festival.*
Performance Measures	Engage Cheltenham children and young people in positive activities that enrich their social and emotional development. Enhance the quality of life and wellbeing of Cheltenham residents through inclusive access to creative and cultural opportunities.

Financial history from Charity Commission (NB: 2020 festival cancelled so grant not paid over)

	Income / Expenditure	30/06/2020	30/06/2021	30/06/2022	30/06/2023	30/06/2024
☑	Total gross income	£7.01k	£36.34k	£54.99k	£55.36k	£63.80k
☑	Total expenditure	£4.59k	£42.91k	£60.80k	£59.51k	£62.54k
☑	Income from government contracts	N/A	N/A	N/A	N/A	N/A
☑	Income from government grants	N/A	£20.00k	£20.00k	£20.00k	£20.30k

Cheltenham Arts Council	
Charity number	273501
Grant amount 2025-26	£5,000
Funding requirements	The Organisation has been awarded a grant so that it can deliver the following aims: To foster and promote the arts within the Borough of Cheltenham. This is achieved by supporting voluntary arts societies, offering grants, and acting as a representative body for arts interests in the town.
Performance Measures	Ensure local cultural organisations are more financially resilient and are able to deliver cultural projects. Ensure local cultural organisations are able to put on cultural events and programmes that promote inclusive access to creative and cultural opportunities. enhance the quality of life and wellbeing of Cheltenham residents. Ensure Cheltenham children and young people are able to engage in creative and cultural opportunities that enrich their social and emotional development.

Financial history from Charity Commission



Financial period end date

Income / Expenditure	31/03/2021	31/03/2022	31/03/2023	31/03/2024	31/03/2025
Total gross income	£9.28k	£9.64k	£9.63k	£10.84k	£10.23k
Total expenditure	£6.78k	£12.72k	£11.24k	£11.18k	£12.05k
Income from government contracts	N/A	N/A	N/A	N/A	N/A
Income from government grants	N/A	N/A	N/A	£5.00k	£5.00k

Gloucestershire Everyman Theatre	
Charity number	234229
Grant amount 2025-26	£122,300
Funding requirements	The grant is awarded to the Everyman so that it can: • Protect, conserve and improve the fabric of the Everyman Theatre building. • Attract visitors and improve the economic vitality of the town. • Enhance the quality of life and wellbeing of Cheltenham residents through inclusive access to creative and cultural opportunities. • Engage Cheltenham children and young people in positive activities that enrich their social and emotional development. • Deliver community-based performing arts productions for the benefit of Cheltenham residents. • Improve the accessibility of the venue.
Performance measures	Protect, conserve and improve the fabric of the Everyman Theatre building. Attract visitors and improve the economic vitality of the town. Enhance the quality of life and wellbeing of Cheltenham residents through inclusive access to creative and cultural opportunities. Engage Cheltenham children and young people in positive activities that enrich their social and emotional development. Deliver community-based performing arts productions, for the benefit of Cheltenham residents. Improve the accessibility of the venue.
Financial history from Charity Commission	

		Income / Expenditure	Financial period end date 31/03/2021	31/03/2022	31/03/2023	31/03/2024	31/03/2025
☑		Total gross income	£2.56m	£5.05m	£6.51m	£8.19m	£8.50m
☑		Total expenditure	£2.81m	£4.94m	£6.64m	£7.84m	£8.39m
☑		Income from government contracts	N/A	N/A	N/A	N/A	N/A
☑		Income from government grants	£1.41m	£981.42k	£579.54k	£579.54k	£579.54k
☐		Income - Donations and legacies	£1.48m	£1.08m	£649.17k	£673.87k	£635.44k
☐		Income - Other trading activities	£81.73k	£546.67k	£643.54k	£789.85k	£823.61k
☐		Income - Charitable activities	£382.77k	£3.33m	£5.03m	£6.33m	£6.58m
☐		Income - Endowments	£0	£0	£0	£0	£0
☐		Income - Investment	£13.97k	£16.51k	£37.81k	£143.42k	£172.11k
☐		Income - Other	£595.75k	£69.72k	£147.12k	£255.45k	£295.25k
☐		Income - Legacies	£40.00k	£15.00k	£11.00k	£45.65k	£957

Cheltenham Borough Council

Cabinet – 14July 2026

Nominations to Outside Bodies

Accountable member:

Councillor Rowena Hay, Leader of the Council

Accountable officer:

Gareth Edmundson, Chief Executive

Ward(s) affected:

None directly

Key Decision: No

Executive summary:

Following each Annual Council, and at other times when vacancies arise, the Leader/Cabinet takes the opportunity to nominate and, in limited cases, appoint persons to various roles within bodies external to the Council. The opportunity is also taken to nominate persons to other bodies such as Joint Committees and other bodies/groups.

Recommendations: That Cabinet:

1. **makes nominations to the outside bodies as set out in Appendix 3A and Appendix 3B in accordance with the following principles:**

    - **all nominations are made on the basis that the nominee is a representative of Cheltenham Borough Council insofar as that is compatible with any overriding legal duty to the outside body;**

    - **Cabinet / the Leader reserves the right at any time to withdraw/terminate a nomination which it has made; and**

2. **notes the Cabinet Member responsibilities for the bodies/groups listed in Appendix 3C**

---

1. Implications

1.1 Financial, Property and Asset implications

There are no financial implications associated with this report.

Signed off by: Ela Jankowska, Finance Business Partner, ela.jankowska@cheltenham.gov.uk

1.2 Legal implications

See body of the report.

Appointments/nominations to outside bodies are made in accordance with the Council Constitution. Guidance for Members appointed to outside bodies can be found at Part 5G of the Constitution.

Signed off by: Alison McKane, Interim Deputy Monitoring Officer, alison.mckane@cheltenham.gov.uk

1.3 Environmental and climate change implications

There are no environmental implications to consider.

Signed off by: Maizy McCann, Climate Officer, Maizy.McCann@cheltenham.gov.uk

1.4 Corporate Plan Priorities

This report contributes to the following Corporate Plan Priorities:

Taking Care of Your Money

The nomination of representatives of Cheltenham Borough Council to the identified outside bodies helps develop valuable links between the council and community-based organisations supporting community priorities and community engagement.

Signed off by: Ann Wolstencroft, ann.wolstencroft@cheltenham.gov.uk

1.5 Equality, Diversity and Inclusion Implications

Please refer to Appendix ii

1.6 Performance management – monitoring and review

Members who represent the Council on unincorporated outside bodies are required to submit a written report to either full council or Cabinet, at least annually, on the activities of the organisation in accordance with Part 5G - Protocol for Appointments to Outside Bodies.

2 Background

2.1 The external bodies to which nominations/appointments are made comprise a variety of organisations and groups. Some are distinct legal entities, such as companies or Trusts, whilst others are unincorporated.

2.2 In most cases the authority decides who to nominate to the outside body concerned and it is then for that body to decide on whether to accept the nomination and make the appointment. There are some limited exceptions to this, such as Cheltenham Borough Homes, Gloucestershire Airport, and the Cheltenham Trust where the council has the right (by virtue of its interests in those companies) to make the nominations/appointments to the boards of directors.

2.3 Appointments are for two years.

3. Legal Context

3.1 Although nominations/appointments to outside bodies are made on the general basis that the nominee/appointee is the council's representative on the outside body, it is important to note that in some cases the overriding duty is to the outside body. For example, a company director has a primary duty of care towards the company and to act in the best interests of the company as a whole and a trustee must act in accordance with the trust deed and uphold the trust's objectives. In these circumstances members must apply independent judgement in respect of the body to which they are appointed.

3.2 The council is able to indemnify members (and officers) in the course of their activities on outside bodies provided they are acting within the scope of their authority as council representatives. In the case of Outside Bodies that are not separate legal entities, the Council's Public and Employers liability policies extend to members and Officers provided that they are acting within the scope of their authority as representatives of the Council and are conducting activities approved by the Council. It is therefore essential that members and officers identify and clarify the extent of their individual responsibilities.

Outside Bodies that are legal entities in their own right (e.g. companies) must have appropriate insurance arrangements in place to indemnify the individuals concerned. It is therefore imperative that members and officers confirm that appropriate cover exists. If there is any doubt, advice should be obtained from the Monitoring Officer.

3.3 Under the executive functions set out in part 3E of the Council's constitution, the Leader has the power to make nominations and appointments to outside bodies where they relate to an executive function or revoke such nominations and appointments provided there is group leader agreement. Where there is not group leader agreement, the decision is referred to Council.

3.4 The Leader has chosen to refer the decisions on appointment to Cabinet. The Leader has however the power in part 3E of the Constitution to appoint or nominate individuals to outside bodies in respect of Executive Functions and revoke or withdraw such appointment or nomination provided all group leaders agree.

4. Nomination/appointment of external persons

4.1 Historically the council has nominated/appointment external persons to some outside bodies. On 29 June 2006, Council specifically agreed that ‘all nominees are elected Members of Cheltenham Borough Council unless there are exceptional reasons justifying the appointment of a non-Member’ for example there is a need for specialist knowledge, skills and experience and/or the lack of Member nomination to that body.

4.2 External persons are not, of course, subject to the Code of Members’ Conduct, nor are they under any general obligation to act in the best interests of the council or the broader public interest. Also, they are not covered by the council’s insurance. Whilst these factors do not prevent the nomination of external persons, they should be borne in mind when considering whether to make such nominations/appointments.

5. Reasons for recommendations

5.1 It is in the interests of the council to ensure representation on outside bodies.

6. Alternative options considered

6.1 None.

7. Consultation and feedback

7.1 The appendices have been circulated to group leaders.

8. Key risks

8.1 Please see Appendix 1.

Report author:

Bev Thomas, Democratic Services Team Leader

bev.thomas@cheltenham.gov.uk

Appendices:

1. Risk Assessment
2. Equality Impact Assessment – Screening
3. Nominations and Appointments 2026

Background information:

Constitution Part 5G – Guidance for Councillors appointed to represent the Council on Outside Bodies

Appendix 1: Risk Assessment

Risk ref	Risk description	Risk owner	Impact score (1-5)	Likelihood score (1-5)	Initial raw risk score (1 - 25)	Risk response	Controls / Mitigating actions	Control / Action owner	Deadline for controls/ actions
1	If elected members are not aware of their roles and responsibilities, they may compromise their position	Monitoring Officer	3	2	6	accept	Ensure members are aware of guidance set out in Part 5 G of the Constitution. Ensure members understand their role on the outside body and have a copy of relevant constitution or terms of reference of the body concerned	Monitoring Officer	

Appendix 2: Equality Impact Assessment (Screening)

1. Identify the policy, project, function or service change

a. Person responsible for this Equality Impact Assessment	
Officer responsible: Bev Thomas	Service Area: Democratic Services
Title: Democratic Services Team Leader	Date of assessment: 19 June 2026
Signature: B Thomas	

b. Is this a policy, function, strategy, service change or project?	Function
If other, please specify:	

c. Name of the policy, function, strategy, service change or project	
Nominations to outside bodies	
Is this new or existing?	**Already exists and is being reviewed**
Please specify reason for change or development of policy, function, strategy, service change or project	
Nominations/appointments are made after each Annual and Selection Council	

d. What are the aims, objectives and intended outcomes and who is likely to benefit from it?	
Aims:	Cheltenham Borough Council appoints people to sit on a number of outside bodies to represent the Council and to participate in their management and planning processes.
	The nomination of representatives of Cheltenham Borough Council to the identified outside bodies helps develop valuable links between the council and community-based organisations supporting community priorities and community engagement.
Benefits:	To provide knowledge, skills and expertise which may not otherwise be available • To provide local accountability or democratic legitimacy through the appointment of an elected representative • To ensure that good relationships can be maintained with the

	body • To deliver a partnership project that requires the input of other organisations or community groups • To protect the council's investment or assets, ie, if the council has provided grant funding or provides funding for service delivery • To lever in external funding which would not be available to the council on its own

e. What are the expected impacts?	
Are there any aspects, including how it is delivered or accessed, that could have an impact on the lives of people, including employees and customers.	**Yes**
Do you expect the impacts to be positive or negative?	**Positive**
Please provide an explanation for your answer:	
The nomination of representatives of Cheltenham Borough Council to the identified outside bodies helps develop valuable links between the council and community-based organisations supporting community priorities and community engagement	

If your answer to question e identified potential positive or negative impacts, or you are unsure about the impact, then you should carry out a Stage Two Equality Impact Assessment.

f. Identify next steps as appropriate	
Stage Two required	**No**
Owner of Stage Two assessment	
Completion date for Stage Two assessment	

Appendix 3 – Outside Bodies Nominations and Appointments

Appendix 3A – Nominations

	Name of organisation	Nomination
1	Brizen Young People's Centre	Councillor Tony Oliver
2	Cheltenham Arts Council	Councillor Steve Steinhardt Councillor Flo Clucas
3	Cheltenham Borough Homes	Councillor Glenn Andrews
4	Cheltenham International Partnerships	Councillor Angie Boyes Councillor Garth Barnes Councillor Karen Priest
5	Cheltenham Playhouse	Councillor Richard Pineger
6	Community Connexions	Councillor Victoria Atherstone
7	Cotswolds National Landscape	Councillor Martin Horwood
8	Everyman Theatre	Councillor Garth Barnes
9	Friends of Leckhampton Hill and CK Common	Councillor Angie Boyes Councillor Julia Chandler
10	Glos Airport Ltd	Councillor Adrian Bamford Councillor Mike Collins
11	Sandford Parks Lido	Councillor Iain Dobie
12	St Margaret's Hall User Group	Councillor Julie Sankey
13	Victory Trust	Councillor Julie Sankey
14	West Cheltenham Partnership	Councillor Peter Jeffries

Appendix 3B – Trustee Nominations

	Trust	Nomination
1	Cheltenham Trust	Councillor Barbara Clark Councillor Richard Lawler
2	Cleeve Common Trust	Councillor Simon Wheeler Councillor Julie Sankey Vacancy
3	Higgs & Cooper (and Relief in Need)	Councillor Angie Boyes Vacancy
4	Pates Grammar School Foundation	Councillor Martin Horwood
5	Prestbury United Charities	Councillor Stan Smith Councillor Flo Clucas

Appendix 3C – Cabinet Member Responsibilities

	Name of organisation	Appointment
1	Cheltenham BID Board	Leader: Councillor Rowena Hay
2	Cheltenham Communities Partnership (incorporates statutory responsibilities for community safety partnership)	Cabinet Member for Safety and Communities: Councillor Jamie Jamieson
3	Cheltenham Culture Board and Strategy Group	Cabinet Member for Economic Development, Wellbeing and Culture: Councillor Izaac Tailford
4	Glos Recycling and Waste Partnership	Cabinet Member for Waste, Recycling, Parks and Garden and Public Open Space, Councillor Steve Harvey Councillor Suzanne Williams
5	Leadership Gloucestershire	Leader: Councillor Rowena Hay
6	LGA General Assembly	Leader: Councillor Rowena Hay
7	Local Councils Network	Leader: Councillor Rowena Hay
8	PatrolAJC	Cabinet Member for Finance and Assets: Cllr Peter Jeffries
9	Southwest Councils	Leader: Councillor Rowena Hay
10	Southwest Councils Employers Panel	Leader: Councillor Rowena Hay

Document is Restricted

This page is intentionally left blank