

# Public Document Pack



The following reports are Information Items for the Corporate and Regeneration Scrutiny Committee.

- 1 Workforce Development Strategy 2021-24 Update.
- 2 Employee Wellbeing Strategy 2021-2024 Update.
- 3 Corporate Services and Miscellaneous Finance 2023/2024 Budget Monitoring Report (Period 9).
- 4 Economy and Environment 2023-24 Budget Monitoring Report (Period 9).
- 5 2023/24 Capital Expenditure Monitoring Report (Period 9).
- 6 Treasury Management and Capital Financing Prudential Indicators Quarter 3 Monitoring Report (1st April 2023 to 31st December 2023).
- 7 Strategic Equality Plan Annual Report 2022-2023.



## **CORPORATE AND REGENERATION SCRUTINY COMMITTEE - 20<sup>TH</sup> FEBRUARY 2024**

**SUBJECT: WORKFORCE DEVELOPMENT STRATEGY 2021 – 24 UPDATE –  
INFORMATION ITEM**

**REPORT BY: CORPORATE DIRECTOR EDUCATION AND CORPORATE  
SERVICES**

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### **1. PURPOSE OF REPORT**

- 1.1 The purpose of the report is to update Corporate & Regeneration Scrutiny Committee in relation to the Workforce Development Strategy 2021 – 24 action plan.

### **2. SUMMARY**

- 2.1 The Workforce Development 2021 – 24 was agreed by Cabinet on 29<sup>th</sup> September 2021.
- 2.2 The Strategy is supported by an action plan to assist the delivery of the many objectives identified.
- 2.3 The report provides Scrutiny Members with an update of the action plan.

### **3. RECOMMENDATIONS**

- 3.1 Corporate & Regeneration Scrutiny Committee are asked to note the contents of this report.

### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 The recommendation is made to provide Scrutiny Members with an update of the action plan.

### **5. THE REPORT**

- 5.1 As stated, the Workforce Development Strategy 2021 – 24 was agreed by Cabinet on

29<sup>th</sup> September 2021.

- 5.2 The Strategy confirms our people are our most valuable asset and are at the very heart of everything we do. Developing an engaged, skilled and effective workforce that champions our values and is capable of meeting the future needs of our residents, is essential to our ability to deliver our ambitious transformation objectives.
- 5.3 The Strategy outlines our commitment to developing our workforce and details how we will create the right environment, enhance our support and better equip our people with the right skills to be highly effective in their jobs and achieve greater levels of job satisfaction.
- 5.4 There is an agreed action plan included within the Strategy to assist the delivery of the many objectives identified.
- 5.5 This report provides Scrutiny Members with an update of that action plan at Appendix 1.

#### 5.6 **Conclusion**

Members will note that progress is being made against the actions, albeit the target date for some actions has not been fully met.

### 6. **ASSUMPTIONS**

- 6.1 There are no assumptions made within this report.

### 7. **SUMMARY OF INTEGRATED IMPACT ASSESSMENT**

- 7.1 An Integrated Impact Assessment has not been completed as this report is an information item. An Integrated Impact Assessment was submitted to Cabinet with the Strategy in September 2021.

### 8. **FINANCIAL IMPLICATIONS**

- 8.1 There are no financial implications to this report.

### 9. **PERSONNEL IMPLICATIONS**

- 9.1 There are no personnel implications to this report.

### 10. **CONSULTATIONS**

- 10.1 The consultation responses have been incorporated in the report.

### 11. **STATUTORY POWER**

- 11.1 Local Government Act 1972

Author: Lynne Donovan, Head of People Services

Consultees: David Street, Deputy Chief Executive  
Richard Edmunds, Corporate Director, Education and Corporate Services  
Mark Williams, Corporate Director, Economy and Environment  
Cllr Nigel George, Cabinet Member for Corporate Services, Property and Highways

Background Papers:

Report to **Cabinet 29<sup>th</sup> September 2022** 'WORKFORCE DEVELOPMENT STRATEGY 2021 – 24'

Appendices:

Appendix 1 Workforce Development Strategy 2021 – 24 Action Plan

## WORKFORCE DEVELOPMENT STRATEGY 2021-24 ACTION PLAN

PRIORITY ACTIONS		METHOD OF DELIVERY / PROJECT	LEAD OFFICER	PROJECT GOVERNANCE	TIMESCALE	Progress to Date
1.1	Implement a sustainable model of flexible/agile working for the authority.	Corporate Review: Flexible Working	Head of Infrastructure	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	2022	Policies reviewed to support agile working & agreed with effect from January 2023: Agile Working Policy Mileage Policy Annual Leave Policy Flexible Working Policy
1.2	Implement Workforce Planning	Corporate Review: Workforce Development (Workstream - Workforce Planning Framework and Manager Toolkit)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	2022	Draft framework and toolkit in place and piloted with some Heads of Service. Training with LGA for Heads of Service in October 2023 but rearranged for January 2024. The toolkit will be rolled out to support service changes as a result of the Mobilising Team Caerphilly work.
1.3	Develop a workforce data dashboard	Management Information Review	Head of People Services	<ul style="list-style-type: none"> <li>HR Strategy Group</li> </ul>	2022	Following the upgrade of the HR / Payroll system in 2023, workforce data dashboards are being developed and will be in place Q1 2024 / 25.
1.4	Update HR and Health & Safety policies and procedures.	HR and H&S Policy Review Project	Head of People Services	<ul style="list-style-type: none"> <li>HR Strategy Group, / Health &amp; Safety Committee</li> </ul>	2022	Policies reviewed & agreed.  With effect from January 2023: Agile Working Policy Mileage Policy Annual Leave Policy Flexible Working Policy

Page 5						<p>With effect from June 2023: Employee Protection Procedure Violence at Work Policy</p> <p>Policies currently under review: Leave of Absence (will include review of all relevant policies that support leave of absence) Parental Leave Scheme Maternity Policy Disciplinary Procedure Grievance Procedure Code of Conduct for Employees Whistleblowing Procedure Redeployment Scheme Probationary Procedure Pay Protection Scheme Lone Working Policy Manual Handling &amp; Musculoskeletal Policy Risk Assessment Policy Wellbeing Policy Legionella Policy Control of Noise at Work Policy</p>
2.1	Update the recruitment procedure to enhance the customer experience.	Corporate Review: Workforce Development (Workstream – Recruitment Review)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	2022	<p>Funding agreed for a Recruitment Team and appointments made. Recruitment process to be reviewed by the team. New application form and portal in place. New web pages created. Videos created to profile the Council and service areas. Membership with LinkedIn. Targeted recruitment activity.</p>

						Support for candidates via community recruitment events. Language recruitment have been implemented. Onboarding module being finalised.
<b>2.2</b>	Implement development pathways and 'grow-our-own' initiatives.	Workforce Planning Framework and Manager Toolkit.	Head of People Services	<ul style="list-style-type: none"> <li>Corporate Management Team / HR Strategy Group</li> </ul>	Quarter 3 2021-22	Work is ongoing with the Employment Teams to provide more placement opportunities (including voluntary) across the Council that could lead to employment opportunities. Appointment of 31 Apprentices in 2022 and ongoing funding of £250k agreed by Council. An Apprentice recruitment campaign will be run in Q1 2024 / 25.
<b>2.3</b> Page 6	Embed the My Time/My Time Extra programme and train our managers to deliver effective conversations.	Corporate Review: Workforce Development (Workstream – Learning & Development)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	Quarter 3 2021-22	MyTime/ MyTime Extra rolled out across organisation. Supporting video produced from Corporate Director Education & Corporate Services Options for training being sourced to support managers to manage in an agile way. To be included as a topic for the pulse surveys.
<b>2.4</b>	Continue to develop our employment programmes.	Caerphilly Academy – Gateway to Employment initiative.	Head of Planning & Regeneration	<ul style="list-style-type: none"> <li>Corporate Management Team</li> </ul>	Quarter 4 2021-22	With the support of SPF funding, the Caerphilly Academy programme is in the process of expanding its mentor capacity with a broader target group.
<b>3.1</b>	Develop a new Corporate Induction and review our local induction programme.	Corporate Review: Workforce Development (Workstream – Corporate Induction)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	Quarter 3 2021-22	The Onboarding module is being finalised and will be in place Q1 2024 / 25. Model of delivery agreed – videos in development to form Corporate Induction eLearning Module.

						The new Digital Workspace has been implemented enabling all staff to access the system.
<b>3.2</b>	Establish a network of equalities and inclusivity champions across the authority, who will act as representatives for all staff with protected characteristics; working in collaboration with the Equalities Team and the Trade Unions to drive the equalities agenda locally.	Strategic Equality Plan (2020-2024)	Head of Transformation	<ul style="list-style-type: none"> <li>Corporate Management Team</li> </ul>	Quarter 4 2021-22	Network on hold pending the undertaking of a Welsh Language Skills Audit across the organisation.
<b>3.3</b> Page 7	Continue to develop and facilitate targeted events, promotions and initiatives to celebrate diversity.	Strategic Equality Plan (2020-2024)	Head of Transformation	<ul style="list-style-type: none"> <li>Corporate Management Team</li> </ul>	Quarter 4 2021-22	Pride Caerffili was a success and we are the first in Wales to lead on our very own Pride event. Pride Caerffili will happen again in June 2024. The Welsh Language team supported events and campaigns at schools. Promotion of awareness days taken place and planned for the future.
<b>3.4</b>	Explore opportunities to enhance our equalities training provision.	Strategic Equality Plan (2020-2024)	Head of Transformation	<ul style="list-style-type: none"> <li>Corporate Management Team</li> </ul>	2022	Equalities training continues to be delivered and further opportunities continue to be reviewed.
<b>3.5</b>	Develop a Wellbeing Strategy, outlining our priority actions and corporate objectives.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	Quarter 2 2021-22	Strategy agreed by Cabinet 29.09.21.
<b>3.6</b>	Continue to develop our digital well-being platform.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	2022	New digital workspace launched in October 2023 with Wellbeing pages. Wellbeing bulletin produced monthly. Regular promotion of Employee Assistance Programme.



3.7	Implement a Corporate Volunteering Policy, outlining our commitment to corporate social responsibility.	Corporate Review: Corp Volunteering & Community Partnership (Workstream – Corporate Volunteering Policy)	Head of Transformation	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	Quarter 2 2021-22	Policy agreed by Cabinet 21.06.21.
3.8	Embed the principles of our Consultation and Engagement Framework.	Corporate Communications & Engagement Strategy 2019-2023	Head of Transformation	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	Quarter 4 2021-22	Internal engagement group of cross-Directorate colleagues is in place. A participation strategy was agreed by Cabinet in 2023.
3.9	Develop the Staff Recognition Awards initiative.	Corporate Communications & Engagement Strategy 2019-2023	Head of Transformation	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	Quarter 4 2021-22	Ad hoc arrangements in place across Directorates. The staff recognition initiative is featured on the operational level Mobilising Team Caerphilly single view of change.
4.1 Page 8	Develop our management development programme.	Corporate Review: Workforce Development (Workstream – Learning & Development)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / Corporate Management Team</li> </ul>	Quarter 4 2021-22	Bespoke CCBC programme being developed. The MeUs programme has been developed and rolled out. Leadership/management training opportunities offered via the Infuse and CEIC programmes. Leadership training offered through the Summer and Winter Schools run through Academi Wales. Staff studying leadership and management courses via colleges, universities and local providers.
4.2	Develop our organisational learning and development function.	Corporate Review: Workforce Development (Workstream – Learning & Development)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / Corporate Management Team</li> </ul>	Quarter 3 2021-22	Workforce Development Team now in place. Review of current learning and development arrangements being undertaken.

4.3	Develop our digital platform for managing corporate learning and development.	Corporate Review: Workforce Development (Workstream – Learning & Development)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	Quarter 4 2021-22	<p>This new digital workspace will offer far greater scope to promote learning &amp; development opportunities with accessibility to all staff.</p> <p>A new Learning Management System (LMS) 'Thingi' will be introduced in 2024. This is a collaborative project with other Welsh LAs which will enable improved learning and development opportunities.</p>
4.4	Develop our digital learning and development resources.	Corporate Review: Workforce Development (Workstream – Learning & Development)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	2022	See 4.3.
4.5 Page 9	Develop our links with private training providers, local colleges and universities.	Corporate Review: Workforce Development (Workstream – Learning & Development)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group</li> </ul>	Quarter 3 2021-22	Options paper being drafted. The organisation is taking advantage of numerous funded training opportunities.
4.6	Explore in partnership with our trade union colleagues, how we can best utilise the Welsh Union Learning Fund to widen our training programmes.	Corporate Review: Workforce Development (Workstream – Learning & Development)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board / HR Strategy Group / Corporate Services JCC</li> </ul>	Quarter 3 2021-22	Discussions ongoing with the Trade Unions with a focus being given to wellbeing and mental health.



## **CORPORATE AND REGENERATION SCRUTINY COMMITTEE – INFORMATION ITEM - 20<sup>TH</sup> FEBRUARY 2024**

**SUBJECT: EMPLOYEE WELLBEING STRATEGY 2021 – 24 UPDATE**

**REPORT BY: CORPORATE DIRECTOR EDUCATION AND CORPORATE  
SERVICES**

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### **1. PURPOSE OF REPORT**

- 1.1 The purpose of the report is to update Corporate & Regeneration Scrutiny Committee in relation to the Employee Wellbeing Strategy 2021 – 24 action plan.

### **2. SUMMARY**

- 2.1 The Employee Wellbeing Strategy 2021 – 24 was agreed by Cabinet on 29<sup>th</sup> September 2021.
- 2.2 The Strategy is supported by an action plan to assist the delivery of the many objectives identified.
- 2.3 The report provides Scrutiny Members with an update of the action plan.

### **3. RECOMMENDATIONS**

- 3.1 Corporate & Regeneration Scrutiny Committee are asked to note the contents of this report.

### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 The recommendation is made to provide Scrutiny Members with an update of the action plan.

### **5. THE REPORT**

- 5.1 As stated, the Employee Wellbeing Strategy 2021 – 24 was agreed by Cabinet on 29<sup>th</sup> September 2021.

- 5.2 The Strategy confirms our absolute priority at Caerphilly County Borough Council is to work with our employees to promote and facilitate good health and wellbeing and to provide excellent services to those who need our support.
- 5.3 The Strategy details how we achieve our vision: 'Working together to fully support our employees' health and wellbeing.'
- 5.4 There is an agreed action plan included within the Strategy to assist the delivery of the many objectives identified.
- 5.5 This report provides Scrutiny Members with an update of that action plan at Appendix 1.

## 5.6 **Conclusion**

Members will note that progress is being made against the actions, albeit the target date for some actions has not been fully met.

## 6. **ASSUMPTIONS**

- 6.1 There are no assumptions made within this report.

## 7. **SUMMARY OF INTEGRATED IMPACT ASSESSMENT**

- 7.1 An Integrated Impact Assessment has not been completed as this report is an information item. An Integrated Impact Assessment was submitted to Cabinet with the Strategy in September 2021.

## 8. **FINANCIAL IMPLICATIONS**

- 8.1 There are no financial implications to this report.

## 9. **PERSONNEL IMPLICATIONS**

- 9.1 There are no personnel implications to this report.

## 10. **CONSULTATIONS**

- 10.1 The consultation responses have been incorporated in the report.

## 11. **STATUTORY POWER**

- 11.1 Local Government Act 1972

Author: Lynne Donovan, Head of People Services

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Mark Williams, Corporate Director, Economy and Environment  
Cllr Nigel George, Cabinet Member for Corporate Services, Property and  
Highways

Background Papers:

**Report to Cabinet 28<sup>th</sup> September 2022 'EMPLOYEE WELLBEING STRATEGY 2021 – 24'**

Appendices:

Appendix 1 Employee Wellbeing Strategy 2021 – 24 Action Plan

## EMPLOYEE WELLBEING STRATEGY 2021-24 ACTION PLAN

	PRIORITY ACTIONS	METHOD OF DELIVERY / PROJECT	LEAD OFFICER	PROJECT GOVERNANCE	TIMESCALE	Progress to Date
Page 13  1.1	Update our HR policies and procedures.	HR and H&S Policy Review Project	Head of People Services	<ul style="list-style-type: none"> <li>• HR Strategy Group</li> <li>• Health &amp; Safety Committee</li> </ul>	2022	<p>Policies reviewed &amp; agreed.</p> <p>With effect from January 2023: Agile Working Policy Mileage Policy Annual Leave Policy Flexible Working Policy</p> <p>With effect from June 2023: Employee Protection Procedure Violence at Work Policy</p> <p>Policies currently under review: Leave of Absence (will include review of all relevant policies that support leave of absence) Parental Leave Scheme Maternity Policy Disciplinary Procedure Grievance Procedure Code of Conduct for Employees Whistleblowing Procedure Redeployment Scheme Probationary Procedure Pay Protection Scheme Lone Working Policy Manual Handling &amp; Musculoskeletal Policy Risk Assessment Policy Wellbeing Policy Legionella Policy Control of Noise at Work Policy</p>

1.2	Engage and support employees to volunteer as Mental Health Champions and explore opportunities to train employees as Mental Health First Aiders.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>HR Strategy Group</li> <li>Health &amp; Safety Committee</li> </ul>	2022	Training to be facilitated by provider of Employee Assistance Programme. Contract with new provider effective from September 2023 and training is now being explored.
1.3	Undertake a review of the Wellbeing Group and repurpose the terms of reference to align to the principles of the Wellbeing Strategy.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>HR Strategy Group</li> <li>Health &amp; Safety Committee</li> </ul>	Quarter 4 2021 - 2022	Not yet undertaken. Need to review group membership
1.4	Develop our wellbeing digital platforms and communications.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>HR Strategy Group</li> </ul>	2022	New digital workspace launched in October 2023 with Wellbeing pages. Wellbeing bulletin produced monthly. Regular promotion of Employee Assistance Programme.
Page 14 1.5	Review our Corporate Membership Scheme	Corporate Review: Workforce Development (Workstream – Wellbeing)	Leisure Services Manager	<ul style="list-style-type: none"> <li>Corporate Management Team</li> </ul>	Quarter 3 2021 – 2022	Still being considered.
1.6	Promote healthy work habits and explore new opportunities to engage our employees in exercise.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Leisure Services Manager	<ul style="list-style-type: none"> <li>HR Strategy Group</li> </ul>	2022	Programme of activities being developed.
2.1	Repurpose and modernise Ty Penallta and other offices to facilitate agile working.	Corporate Review: Flexible Working	Head of Property Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	Quarter 4 2021 - 2022	Agile working space completed on floor one of Ty Penallta and all other floors now utilised with more teams. Other offices being reviewed in accordance with the asset rationalisation plan.
2.2	Implement a sustainable model of flexible/agile working for the Council.	Corporate Review: Flexible Working	Head of Infrastructure	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	2022	Policies agreed (see 1.1) and buildings being repurposed (see 2.1) to support flexible / agile working.
2.3	Expand the scope and provision of training to further upskill our managers to support employee health and wellbeing.	Corporate Review: Workforce Development (Workstream – Management Training)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> <li>HR Strategy Group</li> </ul>	Quarter 4 2022 - 2023	Programme being developed.

2.4	Update our H&S policies and procedures.	HR and H&S Policy Review Project	Head of People Services	<ul style="list-style-type: none"> <li>• HR Strategy Group</li> <li>• Health &amp; Safety Committee</li> </ul>	2022	<p>Policies reviewed &amp; agreed with effect from June 2023: Employee Protection Procedure Violence at Work Policy</p> <p>Policies currently under review: Lone Working Policy Manual Handling &amp; Musculoskeletal Policy Risk Assessment Policy Wellbeing Policy Legionella Policy Control of Noise at Work Policy</p>
3.1 Page 15	Deliver the key workforce objectives of the Strategic Equality Plan 2020-2024.	Strategic Equality Plan (2020-2024)	Head of Transformation	<ul style="list-style-type: none"> <li>• Corporate Management Team</li> </ul>	All actions delivered by 2024	Equality Objective 6 in the Strategic Equality Plan ' <i>Inclusive, Diverse and Equal Workforce – Create a workforce which reflects and respects the diversity of the communities within the county borough</i> ' and is reported on regularly.
3.2	Working with the Trade Unions, continue to raise awareness of all forms of discrimination and the requirement to effectively challenge prejudice at source.	HR and H&S Policy Review Project	Head of People Services	<ul style="list-style-type: none"> <li>• Corporate JCC</li> </ul>	Quarter 4 2021 - 2022	Council signed up to the Unity Over Diversity Charter in October 2020. Awaiting dates from Trade Unions to roll out briefing sessions across the Authority.
3.3	Upgrade our membership of the Disability Confident Scheme.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>• Corporate Management Team</li> <li>• HR Strategy Group</li> </ul>	2022	Level 2 membership extended in September 2023. Action Plan to be produced to achieve Level 3.
3.4	Re-establish our membership of Stonewall Cymru.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>• Corporate Management Team</li> <li>• HR Strategy Group</li> </ul>	2022	This is no longer an action in the Strategic Equality Plan 2024-28.
3.5	Publish the Neurodiversity Factsheet and work with the Trade Unions to	HR and H&S Policy Review Project	Head of People Services	<ul style="list-style-type: none"> <li>• HR Strategy Group</li> </ul>	Quarter 3 2021 - 2022	Factsheet published. Training and funding agreed with Trade Unions.



	organise neurodiversity training.					Training facilitated for HR. To be rolled out across other services.
3.6	Develop the Staff Recognition Awards initiative.	Corporate Communications & Engagement Strategy 20019-2023.	Head of Transformation	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	Quarter 4 2021 - 2022	<p>Ad hoc arrangements in place across Directorates.</p> <p>The staff recognition initiative is featured on the operational level Mobilising Team Caerphilly (MTC) single view of change.</p>
3.7	Develop and implement diversity and inclusivity training for our Members.	Strategic Equality Plan (2020-2024)	Head of Legal Services & Monitoring Officer	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	2022	Completed
3.8	Conduct regular pulse surveys to support our more comprehensive staff surveys.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> </ul>	2024	Themes currently being considered for early 2024 following the introduction of the new digital workspace with effect from October 2023.
Page 16 4.1	Implement the Workforce Development Strategy 2021-2024.	Corporate Review: Workforce Development (Workstream - Workforce Development Strategy)	Head of People Services	<ul style="list-style-type: none"> <li>Team Caerphilly Programme Board</li> <li>Policy &amp; Resources Scrutiny Committee</li> <li>Cabinet</li> </ul>	Quarter 3 2021 - 2022	Strategy agreed by Cabinet 29.09.21.
4.2	Deliver the Priority Actions outlined in the Workforce Development Strategy 2021-2024.	Corporate Review: Workforce Development (Workstream - Workforce Development Strategy)	Head of People Services	<ul style="list-style-type: none"> <li>HR Strategy Group</li> <li>Corporate Management Team</li> <li>Policy &amp; Resources Scrutiny Committee</li> <li>Cabinet</li> </ul>	All actions delivered by 2024	See Workforce Development Action Plan

4.3	Implement Workforce Planning	Corporate Review: Workforce Development (Workstream - Workforce Planning Framework and Manager Toolkit)	Head of People Services	<ul style="list-style-type: none"> <li>• Team Caerphilly Programme Board</li> <li>• HR Strategy Group</li> </ul>	2022	Draft framework and toolkit in place and piloted with some Heads of Service. Training with LGA for Heads of Service in October 2023 but rearranged for January 2024. The toolkit will be rolled out to support service changes as a result of the Mobilising Team Caerphilly work.
4.4 Page 17	Embed the My Time/My Time Extra programme and train our managers to deliver effective conversations.	Corporate Review: Workforce Development (Workstream – Management Training)	Head of People Services	<ul style="list-style-type: none"> <li>• Team Caerphilly Programme Board</li> <li>• HR Strategy Group</li> </ul>	Quarter 3 2021 - 2022	MyTime/ MyTime Extra rolled out across organisation. Supporting video produced from Corporate Director Education & Corporate Services Options for training being sourced to support managers to manage in an agile way. To be included as a topic for the pulse surveys.
5.1	Undertake a Non-Guaranteed Hours Arrangement (NGHA) review.	Contract Review Project	Head of People Services	<ul style="list-style-type: none"> <li>• HR Strategy</li> <li>• Corporate Management Team</li> </ul>	Quarter 4 2021 - 2022	Review undertaken and some contract changes made. Further work will progress with Heads of Service as part of the Mobilising Team Caerphilly work
5.2	Periodically promote the financial advice provided by Care First.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>• HR Strategy Group</li> </ul>	Quarter 3 2021 - 2022	New provider (Vivup) in place with effect from September 2023 and updates will continue to be sent out.
5.3	Review our processes for recording and analysing retirement feedback and data.	Corporate Review: Workforce Development (Workstream – Wellbeing)	Head of People Services	<ul style="list-style-type: none"> <li>• HR Strategy</li> <li>• Corporate Management Team</li> </ul>	2022	New exit surveys in place.
5.4	Review our employee benefits packages	HR and H&S Policy Review Project	Head of People Services	<ul style="list-style-type: none"> <li>• HR Strategy Group</li> <li>• Health &amp; Safety Committee</li> </ul>	2022	Staff benefit scheme and recognition of 40 years Local Government Service Agreed by Cabinet on 15.09.21. Staff benefits and reward platform facilitated by Edenred agreed by Cabinet on 15.09.21.





## **CORPORATE SERVICES AND REGENERATION SCRUTINY COMMITTEE – INFORMATION ITEM - 20<sup>TH</sup> FEBRUARY 2024**

**SUBJECT: CORPORATE SERVICES AND MISCELLANEOUS FINANCE 2023/24  
BUDGET MONITORING REPORT (PERIOD 9)**

**REPORT BY: CORPORATE DIRECTOR OF EDUCATION AND CORPORATE  
SERVICES**

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### **1. PURPOSE OF REPORT**

- 1.1 To inform members of projected revenue expenditure for the Directorate of Corporate Services and Miscellaneous Finance for the 2023/24 financial year.

### **2. SUMMARY**

- 2.1 The report projects the anticipated final outturn for the Directorate of Corporate Services and Miscellaneous Finance based upon expenditure and income trends for the first nine months of the financial year.

### **3. RECOMMENDATIONS**

- 3.1 Members are requested to note the contents of the report.

### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 To ensure that Members are informed of the projected financial position for the Directorate of Corporate Services and Miscellaneous Finance.

### **5. THE REPORT**

#### **5.1 Corporate Services**

- 5.1.1 The Directorate of Corporate Services is currently forecasting a net underspend of £0.993m for the 2023/24 financial year, full details of which are provided in Appendix 1.
- 5.1.2 There is an anticipated net underspend on Chief Executive and Director of Education and Corporate Services of £0.041m, mainly due to the delay in recruiting to the Deputy Chief Executive post, which has now been appointed.
- 5.1.3 The anticipated net underspend of £0.148m in Corporate Finance relates in the main to in-year vacancies, some of which are in the process of being filled, additional one-off grant income, together with the use of reserves to fund a number of fixed term posts.
- 5.1.4 There is an anticipated net underspend of £0.813m in Digital Services, after taking into

account the agreed use of reserves. The underspends will be monitored during the year and may reduce depending on agreed project work. The underspends consist of: -

- A projected underspend of £0.170m for IT Services which is due in the main to delays in filling vacancy posts.
- A projected net underspend of £0.432m on Procurement and Information Governance which relates in the main to a “rebate” of £0.286m as a result a “Wales wide” food procurement contract, along with delays in filling vacant posts after taking into account the agreed use of reserves.
- An underspend of £0.212m for Customer First which is due in the main to vacant posts still to be filled offset by reduced income levels.

5.1.5 Legal and Governance is projecting a net underspend of £0.069m after allowing for the following to be ring-fenced and transferred to earmarked reserves: -

- Projected underspend on Members related expenditure of £0.087m. This is due in the main to underspends on Members’ Allowances and associated budgets which is partly offset by increased costs on Members’ superannuation costs.
- Projected underspend of £0.040m on Electoral Services, due in the main to delays in filling vacant posts.

5.1.6 The net underspend of £0.069m for Legal and Governance is due in the main to delays in filling vacant posts and savings associated with working from home. The net underspend is after taking into account the agreed use of reserves for an additional Committee Services Officer.

5.1.7 There is a projected net underspend of £0.362m for People Services mainly consisting of: -

- Human Resources projected net underspend of £0.158m due in the main to delays in filling vacant posts and some temporary reductions in working hours. The net underspend is after taking account of the agreed use of reserves.
- Health and Safety underspend of £0.073m due in the main to salary savings arising from delays in recruitment after taking account of the agreed use of reserves for Fire and Asbestos Officers.
- Occupational Health is projecting a small underspend of £0.012m.
- The Communications Unit is projecting a net underspend of £0.049m, due in the main to delays in filling vacant posts.
- CMT Support is anticipating a small overspend of £0.001m.
- The Leadership Development Programme budget is anticipated to underspend by £0.068m.
- The Apprentice Programme is progressing with a number of apprentices employed. It is envisaged that any unused budget this year will be ring-fenced to support the programme moving forward.

5.1.8 There is an anticipated £0.150m net underspend in Business Improvement Services after taking account of the following: -

- Management – Projected small underspend of £0.005m.
- Projected net underspend of £0.029m in the Policy Team due in the main to a delay in filling a vacant post.
- Projected underspend of £0.031m in the Equalities and Welsh Language Team due in the main to vacancies and reduced external translation costs.
- Projected underspend of £0.048m in the Performance Management Unit due in the main to delays in filling vacant posts.
- Projected net underspend of £0.022m in the Transformation Team due in the main to some staff not yet reaching the top of salary scales.
- The Community Empowerment Fund is expected to fully spend in this financial year.

- Projected net underspend of £0.014m in the Decarbonisation Team due in the main to staff not being yet being at the top of salary scales and one-off income.

5.1.9 Although Property Services is managed within the Economy and Environment Directorate, budget monitoring has traditionally been considered by the Policy and Resources Scrutiny Committee. For Property Services there is a net projected underspend of £0.114m, consisting of the following: -

- Management – Net £0.023m overspend.
- Energy – estimating a small £0.003m underspend.
- Estates – £0.037m overspend. This is due to reduced fee income levels, partly offset by small salary savings. The fee income will be monitored closely in-year.
- Non – Operational Properties - £0.011m underspend mainly due to additional income.
- Corporate Facilities – a net £0.044m overspend mainly to additional costs to support the heating systems while the new system is installed, partly offset by projected energy costs being lower than expected.
- Maintenance – Projecting a breakeven position but will be monitored closely during the year.
- Building Consultancy – Projected £0.204m underspend due to additional income generated from Fees offset by some additional consultancy costs.
- Agile Zone – this is funded from the agreed earmarked reserve.

5.1.10 There is a projected overspend of £0.704m on Housing Services (excluding the Housing Revenue Account (HRA)), which consists of the following: -

- General Fund Housing is expected to show a £1.029m overspend at this stage, which is mainly as a result of the ongoing Bed and Breakfast placements as well as increased costs by providers.
- This service area includes a statutory duty for Temporary Accommodation which is demand led and difficult to predict. The demand for B&B placements as a result of Covid-19 has been significant with on average 70 cases per month, together with accompanying security costs for the relevant establishments. WG replaced the original Covid Hardship Grant with The Noone Left Out grant but this has significantly reduced from the original Covid Hardship funding received for the previous 2 years. WG confirmed funding in 2023/24 of £0.623m but temporary growth from reserves of £1.700m was also necessary this year to fund the demand. In addition to this, it is evident that B&B placements are still increasing as more people find themselves homeless as a consequence of the Cost of Living crisis especially since the introduction of the new Renting Homes Wales Act in December 2022.
- To give members the scale of increase, the number of homeless placements in B&B this December was 232, compared to 160 in December 22, 136 in December 2021 and 79 in December 2020 which is an increase of 194% in the last 3 years. In this financial year there has been a 23% increase in placements since April.
- - Furthermore, there could be an increase and delay with placements as a result of the current Ukraine situation. It is important to note that for every temporary accommodation placement, the council has to fund on average 80% of the cost. The DWP only funds on average 20% of the cost via housing benefits, which is why the overspend is increasing.
- - There is an added concern now that due to the significant lack of move on accommodation being available in the borough, the length of time people are staying in temporary accommodation is longer, especially where single people are concerned with some being in B&B placements for 24 months or more . This will have a significant impact on the cost of our non-permanent housing as we owe a statutory duty to provide interim accommodation until a suitable offer of housing is made.
- - In addition, in 2023 following the withdrawal of the Lease Scheme with a Social Landlord provider, meant that we have had to hand back approx. 36 properties that were used as suitable forms of emergency housing to the landlord, which has seen an increase in family placements into other forms of temporary accommodation like hotels and bed and

breakfasts which incur higher costs. Whilst we are in the process of establishing and developing alternative models, then we are still required to provide interim housing and therefore are reliant on hotels and bed and breakfast.

- In the long term, however, Welsh Government has set out an ambitious Programme for Government with the aim of making our community a better place to live and work, which will be achieved in part, by reforming homelessness services to focus on prevention and rapid rehousing, which should in theory eradicate the need for B&B placements. However, this a long term strategy likely to take 5-10 years. Emergency Accommodation will still be required but on a
- smaller scale and officers are currently undertaking a review with regard what this provision will look like for CCBC in the longer term. In the meantime, the Council are maximising its Caerphilly Keys Private Rented Sector project and recently launched its own website whilst running a heightened media campaign in an attempt to attract more landlords to the project, so that the Housing Solutions Team can maximise move on within that sector. Funding from the Welsh Governments TACP (Transitional Accommodation Capital Programme) has also helped Caerphilly Homes buy back ex-council homes and Includes a modular housing element that officers are currently considering.
- There is further consideration being given to the Welsh Government White Paper proposal to ending homelessness with interim accommodation where standards, space sharing, young people and the use of hotels and B&B's are concerned.
- Private Sector Housing is currently predicting a £0.325m underspend. After receiving £0.635m budgetary growth this year, this service area no longer has to rely on its fee income to be able to fund the service. However, some agency fee income is still being recovered whilst officers await a decision on reviewing the Private Sector Housing Renewal Policy (due for Cabinet consideration on 13 December 2023). At this point, £0.200m surplus on this budget, due to agency fee income, will be offered back corporately as part of the temporary savings to assist with the 2024/25 transitional budget.

5.1.11 The following table provides a summary of progress in delivering agreed 2023/24 savings for the Directorate of Corporate Services: -

Section	Agreed MTFP Savings £'m	Progress against Savings £'m	Variance £'m
<b>Corporate Services.</b>			
CEO	0.000	0.000	0.000
Director	0.011	0.011	0.000
Corporate Finance	0.218	0.217	0.000
Digital Services	0.274	0.274	0.000
Legal & Governance Support	0.116	0.109	0.007
Peoples Services	0.235	0.216	0.019
Business Improvement Services	0.244	0.235	0.009
	1.098	1.062	0.035
<b>Non-Corporate Services.</b>			
Property Services	0.311	0.262	0.048
	0.311	0.262	0.048
<b>Grand Total</b>	<b>1.409</b>	<b>1.324</b>	<b>0.083</b>

5.1.12 The MTFP budgets were set with an assumed vacancy target, the £0.035m variance in Corporate Services is due in the main to the full target not currently being achieved. This will be kept under review as we progress through the remainder of the financial year. Property Services saving is due to an unexpected call on its maintenance budget.

5.1.13 It is expected that the unachieved MTFP savings will be covered off by other budget savings in the service areas.

## 5.2 Miscellaneous Finance

5.2.1 There is an overall projected underspend of £2.940m in Miscellaneous Finance.

5.2.2 There is a projected net underspend of £2.293m on Capital Financing budgets which is due to the following: -

- £0.636m underspend on Debt Charges due to delays in borrowing requirements.
- Investment income being £1.657m more than the budgeted level due to new medium to long-term investments and increases in the Bank of England base interest rate.

5.2.3 There is a projected overspend of £0.069m on the Trade Union budget. We are currently still in discussions with Trade Union colleagues to review and update our Facilities Agreement to ensure that equitable support arrangements are in place.

5.2.4 The Counsel Fees budget is projected to be breakeven at present, but this is a volatile budget that will be monitored closely during the remainder of the financial year.

5.2.5 The remaining projected overspends in Miscellaneous Finance consist of the following: -

- £0.054m on the Class 1A NI savings, this is due in the main to a reduced take-up of the Tusker GASS car scheme.
- £0.055m net of recharges on Bank Charges, due in the main to increased on-line payments and post office cards.
- £0.072m additional contribution to the Coroners levy due to increased costs of the service.
- £0.009m on PV Panel Maintenance due to an ongoing safety requirement to review the Panels yearly.

5.2.6 The remaining projected underspend for Miscellaneous Finance consists of the following: -

- Subscriptions - £0.014m
- Former Authority on-going pension liability net of recharges – £0.119m.
- £0.757m as a result of not having fund borrowing costs for City Deal
- £0.006m on PV Feed in Tariff income

5.2.7 The following budgets have previously had agreement to ringfence any underspends to their earmarked reserves: -

- Council Tax Reduction Scheme - £0.253m
- Discretionary Rate Relief Scheme - £0.063m, this is due to the revaluation of the businesses and the transitional relief provided by WG for this year only.

5.2.8 The following table provides a summary of progress in delivering agreed 2023/24 savings for Miscellaneous Finance: -



Section	Agreed MTFP Savings £'m	Progress against Savings £'m	Variance £'m
<b>Miscellaneous Finance</b>	4.619	4.619	0.000
<b>Grand Total</b>	4.619	4.619	0.000

5.2.9 The agreed MTFP savings for Miscellaneous Finance are anticipated to be achieved.

## 6. ASSUMPTIONS

- 6.1 Assumptions linked to this report were detailed in the budget report to Council on 23rd February 2023.
- 6.2 The projected outturn position is based on actual income and expenditure details to the end of December 2023.
- 6.3 Forecasts have been made following discussions with Managers based on current information available.

## 7. SUMMARY OF INTEGRATED IMPACT ASSESSMENT

- 7.1 This report is for information only, so an IIA is not required.

## 8. FINANCIAL IMPLICATIONS

- 8.1 As detailed throughout the report.

## 9. PERSONNEL IMPLICATIONS

- 9.1 There are no direct personnel implications arising from this report.

## 10. CONSULTATIONS

- 10.1 There are no consultation responses that have not been reflected in this report.

## 11. STATUTORY POWER.

- 11.1 Local Government Acts 1972 and 2003 and the Council's Financial Regulations.

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L. Sykes – Deputy Head of Financial Services and S151 Officer  
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L. Donovan – Head of People Services  
L. Lucas – Head of Customer and Digital Services  
C. Harrhy, Chief Executive

L. Allen, Principal Accountant, Housing.  
N. Taylor-Williams, Head of Housing.  
D. Street, Deputy Chief Executive  
B. Winstanley, Head of Land and Property Services  
M.S. Williams, Corporate Director for Economy and Environment  
S. Richards, Head of Education Planning and Strategy  
A. Southcombe, Finance Manager, Corporate Services  
Cllr E. Stenner, Cabinet Member for Finance and Performance  
Cllr N. George, Cabinet Member for Corporate Services, Property and Highways  
Cllr S. Cook, Cabinet Member for Housing  
Cllr G. Johnston, Chair of Corporate and Regeneration Scrutiny  
Cllr A McConnell, Vice Chair of Corporate and Regeneration Scrutiny

Appendices:

Appendix 1 Corporate Services and Miscellaneous Finance 2023/24 Budget Monitoring Report (Period 9).

<b>CORPORATE SERVICES DIRECTORATE &amp; OTHER</b>	<b>Estimate 2023-24</b>	<b>Revised Estimate 2023-24</b>	<b>Anticipated Outturn 2023-24</b>	<b>Anticipated Variance 2023-24</b>
<b><u>SUMMARY</u></b>				
<b>CHIEF EXECUTIVE &amp; DEPUTY CHIEF EXECUTIVE</b>	<b>431,785</b>	<b>428,723</b>	<b>390,248</b>	<b>38,475</b>
<b>DIRECTOR CORPORATE SERVICES &amp; EDUCATION</b>	<b>158,044</b>	<b>155,266</b>	<b>152,555</b>	<b>2,711</b>
<b>CORPORATE FINANCE</b>				
Financial services & Internal Audit	2,751,108	2,814,832	2,582,648	232,184
Approved Use of Reserves - IR 35 Officer	(47,585)	(47,585)	(45,500)	(2,085)
Approved Use of Reserves -Capital Accounting Officer	(47,585)	(47,585)	(14,758)	(32,827)
Approved Use of Reserves -Ledger Assistant	(33,844)	(33,844)	(33,844)	(0)
Approved Use of Reserves -C Tax Billing Officers	(67,182)	(67,182)	(30,698)	(36,484)
Approved Use of Reserves - Grants Officer	(52,426)	(52,426)	(8,696)	(43,730)
Approved Use of Reserves - Business Partner	(52,426)	(52,426)	(50,162)	(2,264)
Approved Use of Reserves - Finance Officer - Cashless Catering	(37,771)	(37,771)	(15,188)	(22,583)
Approved use of reserves Call Recording - Benefits & C Tax	0	0	(30,000)	30,000
Approved use of Reserves P360 to Cloud Services	0	0	(12,500)	12,500
Approved Use of Reserves Northgate	0	0	(13,400)	13,400
	<b>2,412,289</b>	<b>2,476,013</b>	<b>2,327,903</b>	<b>148,110</b>
<b>DIGITAL SERVICES</b>				
IT Services	6,997,256	7,049,885	6,739,898	309,987
Approved Use of Reserves	(976,859)			0
Digital Services Manager (50%)	0	(45,182)	(43,825)	(1,357)
Business Relationship Assistant	0	(24,900)	(24,900)	0
IT Support for Schools	0	(176,362)	(176,362)	0
IT Support for Transformation	0	(186,494)	(90,902)	(95,592)
Digital Transformation	0	(493,921)	(287,664)	(206,257)
End User Reserve	0	(50,000)	(43,855)	(6,145)
Schools Management Information Systems Migration Project	0	0	(74,750)	74,750
Approved Use of Reserves - WIFI Infrastructure	0	0	(49,997)	49,997
Approved Use of Reserves - CLOUD Migrations	0	0	(44,633)	44,633
Procurement	1,640,087	1,661,138	1,306,658	354,480
Approved Use of Reserves Information Governance Officer	0	0	(22,141)	22,141
Approved Use of Reserves for Business Relationship Assistant (	0	0	(24,901)	24,901
Approved Use of Reserves for Business Relationship Assistant (	0	0	(7,588)	7,588
Approved Use of Reserves for Business Relationship Assistant	0	0	(22,489)	22,489
Customer First	1,474,561	1,493,943	1,282,297	211,646
	<b>9,135,045</b>	<b>9,228,107</b>	<b>8,414,847</b>	<b>813,260</b>
<b>LEGAL &amp; GOVERNANCE SUPPORT</b>				
Legal & Democratic Services	1,284,193	1,298,609	1,187,459	111,150
Approved Use of Reserves - Committee Services Officer	(42,105)	(42,105)	0	(42,105)
Members Allowances	2,143,795	2,149,527	2,062,971	86,556
Ringfenced to Earmarked Reserves	0	0	86,556	(86,556)
Electoral Services	498,805	502,366	462,845	39,521
Ringfenced to Earmarked Reserves	0	0	39,521	(39,521)
	<b>3,884,688</b>	<b>3,908,397</b>	<b>3,839,352</b>	<b>69,045</b>
<b>PEOPLE SERVICES</b>				
Human Resources	2,509,746	2,542,349	2,177,456	364,893
Approved Use of Reserves - Managing Attendance Officers	(94,460)	(94,460)	(43,499)	(50,961)
Approved Use of Reserves - HR Welsh Translator	(44,139)	(44,139)	(42,316)	(1,823)
Approved Use of Reserves -Linkedin	0	0	(15,000)	15,000
Ringfenced to reserves For Fixed Term MA Posts	0	0	87,827	(87,827)
Ringfenced to reserves For Fixed Term HR Posts	0	0	80,483	(80,483)
Health & Safety	1,010,809	1,029,882	903,552	126,330
Approved Use of Reserves - Fire&Asbestos Officers	(93,662)	(93,662)	(33,519)	(60,143)
Approved Use of Reserves for Asbestos Surveys	0	0	(7,413)	7,413
Occupational Health	245,092	246,919	234,483	12,436
Agreed use of ringfenced reserves	0	0	0	0
Communications Unit	630,922	638,684	631,658	7,026
Approved Use of Reserves - Social Media Management System	(14,000)	(14,000)	(14,000)	0
Approved Use of Reserves -Waste and Recycling project	0	0	(42,585)	42,585
CMT Support	198,967	201,775	202,816	(1,041)
Leadership (MeUs) Development Programme	68,250	68,250	0	68,250
Apprentice Programme	449,696	453,471	276,172	177,299
Approved Use of Reserves - Apprentice	(187,196)	(187,196)	(9,897)	(177,299)
	<b>4,680,025</b>	<b>4,747,873</b>	<b>4,386,218</b>	<b>361,656</b>
<b>BUSINESS IMPROVEMENT SERVICES</b>				
Management	148,868	146,801	141,504	5,297

## CORPORATE SERVICES AND MISCELLANEOUS FINANCE 2023-2024 BUDGET MONITORING REPORT

## APPENDIX 1

Policy	536,768	541,526	511,751	29,775
Equalities	487,354	492,915	462,118	30,797
Performance Management Unit	245,012	248,769	200,429	48,340
Transformation	592,047	598,502	1,299,427	(700,925)
Approved Use of Reserves - Well-being & Placeshaping Officer	(52,035)	(52,035)	0	(52,035)
Approved Use of Reserves - Project Officer Universal Primary FS	(52,035)	(52,035)	(50,163)	(1,872)
Approved Use of Reserves - Place Shaping (Bang on the table)	0	0	(14,500)	14,500
Approved Use of Reserves - Licence to Innovate	0	0	(2,700)	2,700
Approved Use of Reserves - Mobilising Team Caerphilly	0	0	(759,200)	759,200
Community Empowerment Fund	250,000	250,000	250,000	0
Decarbonisation	220,017	220,853	196,832	24,021
Approved Use of Reserves - Fleet Review Officer	(52,035)	(52,035)	(34,252)	(17,783)
Approved Use of Reserves - Decarbonisation Officers	(94,141)	(94,141)	(89,534)	(4,607)
Decarb Revenue Reserve	0	0	(12,631)	12,631
	<b>2,229,820</b>	<b>2,249,120</b>	<b>2,099,081</b>	<b>150,039</b>
<b>TOTAL CORPORATE SERVICES</b>	<b>22,931,696</b>	<b>23,193,499</b>	<b>21,610,202</b>	<b>1,583,297</b>
<b>CORPORATE PROPERTY SERVICES</b>				
Management	405,815	406,130	428,771	(22,641)
Energy	165,760	168,352	164,632	3,720
Estates	207,691	214,585	252,020	(37,435)
Non Operational Properties	94,135	94,135	83,084	11,051
Facilities	3,092,858	3,112,299	3,156,694	(44,395)
Maintenance	1,990,434	1,999,122	1,999,122	0
Building Consultancy	9,621	28,270	(175,394)	203,664
Agile Working Zones	0	0	294,365	(294,365)
Agreed Use of Reserves	0	0	(294,365)	294,365
	<b>5,966,314</b>	<b>6,022,893</b>	<b>5,908,929</b>	<b>113,964</b>
<b>HOUSING SERVICES</b>				
General Fund Housing	3,766,401	3,785,949	4,815,101	(1,029,152)
Private Housing	1,172,485	1,191,013	865,870	325,143
	<b>4,938,886</b>	<b>4,976,962</b>	<b>5,680,971</b>	<b>(704,009)</b>
<b>TOTAL NON-CORPORATE SERVICES</b>	<b>10,905,200</b>	<b>10,999,855</b>	<b>11,589,900</b>	<b>(590,045)</b>
<b>TOTAL SERVICES</b>	<b>33,836,896</b>	<b>34,193,354</b>	<b>33,200,102</b>	<b>993,252</b>

<i>MISCELLANEOUS FINANCE</i>	Estimate 2023-24	Revised Estimate 2023-24	Anticipated Outturn 2023-24	Anticipated Variance 2023-24
<b><i>MISCELLANEOUS FINANCE</i></b>				
<b><i>Staff Related Costs</i></b>				
Pension Contribution - Former Authorities Ongoing	1,125,689	1,125,689	965,306	160,383
Recharge to Education - Former Authorities	(179,629)	(179,629)	(137,770)	(41,859)
	<b>946,060</b>	<b>946,060</b>	<b>827,537</b>	<b>118,523</b>
<b><i>Statutory Benefit Schemes</i></b>				
Council Tax Benefits	17,059,156	17,059,156	16,806,296	252,860
Ringfenced to Earmarked Reserves	0	0	252,860	(252,860)
DHP Rent allowances	40,128	40,128	40,128	0
DHP Rent Rebates	299,149	299,149	699,149	(400,000)
DHP Income	(339,277)	(339,277)	(339,277)	0
Agreed Use of Reserves	0	0	(400,000)	400,000
General Rent Allowances	20,824,510	20,824,510	20,824,510	0
Rent Rebates	22,952,047	22,952,047	22,952,047	0
Rent Allowance War Widow Concessions	25,000	25,000	25,000	0
Housing Benefit Subsidy	(43,776,557)	(43,776,557)	(43,776,557)	0
	<b>17,084,156</b>	<b>17,084,156</b>	<b>17,084,156</b>	<b>0</b>
<b><i>Levies Upon the Council</i></b>				
Coroner	398,539	398,539	458,429	(59,890)
Archives	253,455	254,079	254,079	0
Fire Service Authority	10,381,343	10,381,343	10,381,343	0
	<b>11,033,337</b>	<b>11,033,961</b>	<b>11,093,851</b>	<b>(59,890)</b>
<b><i>Capital Financing</i></b>				
Debt Charges (Principal Repaid)	2,672,511	2,672,511	2,590,945	81,566
Debt Charges (Interest Payments)	7,634,217	7,634,217	7,079,420	554,797
Debt Charges (Debt Management Exp's)	41,792	41,792	41,792	0
Income from External Investments:	(3,332,469)	(3,332,469)	(4,989,357)	1,656,888
Earmarked for specific funds/balances	812,500	812,500	812,500	0
CERA (Capital Expenditure funded from Revenue Account)	1,571,437	1,571,437	1,571,437	0
	<b>9,399,988</b>	<b>9,399,988</b>	<b>7,106,737</b>	<b>2,293,251</b>
<b><i>Corporate and Democratic Core Costs</i></b>				
Bank Charges	228,105	228,105	296,689	(68,584)
Income from HRA	(36,557)	(36,557)	(49,903)	13,346
External Audit Fees	439,001	439,001	439,001	0
Actuarial Fees	2,016	2,016	4,007	(1,991)
Income from HRA	(70,906)	(70,906)	(70,906)	0
Subscriptions	141,720	141,720	127,343	14,377
	<b>703,379</b>	<b>703,379</b>	<b>746,230</b>	<b>(42,851)</b>

<b>MISCELLANEOUS FINANCE</b>	<b>Estimate 2023-24</b>	<b>Revised Estimate 2023-24</b>	<b>Anticipated Outturn 2023-24</b>	<b>Anticipated Variance 2023-24</b>
<b>Grants to Voluntary sector</b>				
Assistance to Voluntary sector	8,735	8,735	8,735	0
Discretionary Rate Relief	196,735	196,735	134,168	62,567
Ringfenced to DRR Earmarked Reserves	0	0	62,567	(62,567)
	<b>205,470</b>	<b>205,470</b>	<b>205,470</b>	<b>0</b>
<b>Private Finance Initiative</b>				
PFI Schools	1,962,308	1,962,308	1,962,308	0
PFI SEW	3,330,618	3,330,618	3,330,618	0
	<b>5,292,926</b>	<b>5,292,926</b>	<b>5,292,926</b>	<b>0</b>
<b>Other</b>				
Counsel Fees	297,129	297,129	297,129	0
Careline	17,789	17,789	21,351	(3,562)
Ringfenced reserves	0	0	(3,562)	3,562
Carbon Management Scheme	4,302	4,302	4,302	0
IT Replacement Strategy	148,644	148,644	148,644	0
PV Panel Maintenance	2,292	2,292	11,190	(8,898)
PV Panels Income	(61,379)	(61,379)	(67,249)	5,870
Risk Management Contribution	(479,330)	(479,330)	(479,330)	0
Class 1A NI	(93,219)	(93,219)	(39,400)	(53,819)
City Deal	902,151	902,151	144,845	757,306
Matched Funding for Community Schemes	16,783	16,783	16,783	0
Targeted Rate Relief Scheme	247,751	247,751	247,751	0
Miscellaneous Items	95,523	90,646	90,646	0
Trade Union Facilities	38,673	40,320	109,485	(69,165)
PFI Review	851,944	851,944	851,944	0
	<b>1,989,053</b>	<b>1,985,823</b>	<b>1,354,529</b>	<b>631,294</b>
<b>TOTAL MISCELLANEOUS FINANCE</b>	<b>46,654,369</b>	<b>46,651,763</b>	<b>43,711,436</b>	<b>2,940,327</b>
<b>EXPENDITURE TO DIRECTORATE SUMMARY</b>	<b>80,491,265</b>	<b>80,845,117</b>	<b>76,911,538</b>	<b>3,933,579</b>



## **CORPORATE SERVICES AND REGENERATION SCRUTINY COMMITTEE – INFORMATION ITEM - 20<sup>TH</sup> FEBRUARY 2024.**

**SUBJECT: ECONOMY AND ENVIRONMENT 2023-24 BUDGET MONITORING  
REPORT (PERIOD 9)**

**REPORT BY: CORPORATE DIRECTOR FOR ECONOMY AND ENVIRONMENT**

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### **1. PURPOSE OF REPORT**

- 1.1 To inform members of projected revenue expenditure for the Economy and Environment Directorate for the 2023-24 financial year. With particular reference to the Regeneration and Planning Division.

### **2. SUMMARY**

- 2.1 The report summarises the most recent budget monitoring projections for 2023-24 based on the latest available financial information. It should be noted that it is only the Planning and Regeneration service division that is within the remit of this Scrutiny Committee with other service division budgets sitting within the remit of the Housing and Environment Scrutiny Committee.

### **3. RECOMMENDATIONS**

- 3.1 Corporate Services and Regeneration Scrutiny Committee Members are requested to note the contents of this report and the detailed budget monitoring pages that follow in respect of the Regeneration and Planning Division, which is the only division that falls within the remit of this Scrutiny Committee.

### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 The Council Budget is based on the achievement of both expenditure and income targets. To ensure these are met and the Council's financial integrity is maintained Directors are required to review income and expenditure trends.

### **5. THE REPORT**

#### **5.1 INTRODUCTION**

- 5.1.1 The report outlines the revenue budget position for each of the service Divisions that form part of the Economy and Environment Directorate based on the most current financial information available. Projected outturn figures for the financial year are compared with the budget to show the anticipated under/overspends. More detailed budget monitoring figures are shown in the appendix 1A.
- 5.1.2 The table 1 below summarises the present budget monitoring position, with an overall

Directorate overspend of £2.164m, but exclusive of ring-fenced budgets is projecting an overspend of £1.823m. Appendix 1A provides more detail on the budget variation projection for Regeneration and Planning Division, which fall under the remit of this Scrutiny.

TABLE 1	Estimate 2023/24 £'m	Revised Estimate 2023/24 £'m	Anticipated Outturn 2023/24 £'m	Variance 2023-24 £'m
Regeneration and Planning Division	3.713	3.796	4.025	(0.229)
Infrastructure Division	25.200	25.317	25.737	(0.420)
Public Protection Division	10.409	10.554	10.370	0.185
Community and Leisure Services Division	28.259	28.620	30.318	(1.698)
Directorate General	0.195	0.192	0.193	(0.001)
NET DIRECTORATE	67.776	68.479	70.643	(2.164)
Home to School Transport - ring fenced over spend				0.950
Social Services Transport – ring fenced under spend				(0.609)
Cemeteries Task and Finish – ring fenced under spend				
NET DIRECTORATE under spend (excluding ring fenced budgets)				(1.823)

## 5.2 REGENERATION and PLANNING DIVISION

- 5.2.1 Overall, the service division presently has a projected overspend of £0.229m for the 2023-24 financial year, full details are provided in Appendix 1
- 5.2.2 There is a small underspend in senior management support of £0.011m due to staff not being paid at the top of the incremental scale. This is after the agreed virement for the Caerphilly Town Placemaking Programme Manager budget.
- 5.2.3 Business Support and Urban Renewal are projecting a net £0.227m overspend, in the main due to reduced funding for the Multi-Disciplinary Team offset by salary savings and a projected underspend on the Community Enterprise Fund. This is after the agreed use of reserves for the International Trade Support Officer and transfer of Community Projects budget to fund the Placemaking Programme Manager.
- 5.2.4 Events are currently projecting a small overspend of £0.005m.
- 5.2.5 There is a projected £0.108m overspend in relation to industrial properties due in the main to an overspend on “property” related costs such as maintenance (£0.121m), Cleaning (£0.021m) and Security (£0.015m) together with additional costs for Equipment (£0.020m) along with supplies and services (£0.056m) offset with some savings on utility costs (£0.100m) and postage (£0.019m) along with an anticipated increased rental income (£0.018m). The industrial and office property portfolio should generate income of £2.49million to the Council. The service is proactively seeking to ensure vacant units are let as quickly as possible by identifying businesses interested in taking up a rental.
- 5.2.6 Town Centre Management is projecting an underspend of £0.024m, due in the main to a delay in filling a vacant post and some staff not being top of scale offset by reduced income levels.
- 5.2.7 Overall Tourism Venues are reporting combined overspend of £0.024m. Further details are below: -



- Tourism Venue Management support is projecting a £0.003m underspend.
- Llancaiach Fawr is projecting a small underspend position at present (£0.005m) due to salary savings and savings on Utilities offset by reduced income levels. Income levels will be closely monitored in year.
- Cwmcarn VC is projecting an overspend of £0.073m due in the main to increased Maintenance, Utility costs and reduced Income levels partially offset to salary savings due to delays in filling vacant posts.
- Winding House is predicting an underspend of £0.024m due in the main to a revaluation on NNDR costs and Utilities partially offset by a reduction in income, additional maintenance costs and salary costs to cover maternity.
- Caerphilly Visitor Centre is predicting a £0.025m overspend due to additional staffing, Utilities, Kitchen equipment and commodity costs being offset by increased income levels.
- Blackwood Miners' Institute is projecting an underspend of £0.043k due in the main to salary savings due to staff not reaching top of the scale offset by income projections being better than anticipated.
- Arts Development is projecting a breakeven position.

- 5.2.8 Community Regeneration is projecting a net £0.026k overspend after the agreed use of reserves for the Apprentice Officer, to support the "Kick-start" project. This is due in the main to the costs of the project work after the agreed transfer of budget to the Placeshaping Programme Managers post.
- 5.2.9 Uk Shared Prosperity Fund and C4WPlus Additional Funding initiatives are all fully funded from grant.
- 5.2.10 Planning Services Management are projecting a small underspend.
- 5.2.11 Regeneration and Planning Administrative Support are projecting a small underspend £0.013m.
- 5.2.12 Strategic Planning is presently projecting a small net underspend of £0.010m. This is due in the main to delays in recruiting to a vacant post. This is after the agreed ringfencing of the Community Infrastructure Levy (CIL) (£0.106m) and the agreed transfer from the LDP reserve (£0.029m).
- 5.2.13 Development Management is reporting underspend of £0.072m primarily due to salary savings due to delays in filling vacant posts partially offset by reduced income levels. Income is very volatile and will be monitored during the year.
- 5.2.14 Building Control is reporting overspend of £0.015m due in the main to reduced income levels being offset by salary savings. The income level is volatile and will be monitored during the year.
- 5.2.15 Land Charge Services along with Land Registry Automation are projecting a net underspend of £0.052m due in the main to increased income levels. The income level is volatile and will be monitored during the year. This takes into account the HMRC funding for the "Land Registry Automation."
- 5.2.16 GIS/Land Gazetteer support services is projecting an overspend of £0.005m.

### 5.3 Medium Term Financial Plan Savings

- 5.3.1 The following table provides a summary of progress in delivering agreed 2023/24 savings for the Directorate of Economy and Environment: -

Section	Agreed MTFP Savings £'m	Progress against Savings £'m	Variance £'m
<b><u>Economy &amp; Environment</u></b>			
Infrastructure	1.161	1.118	0.043
Public Protection	0.060	0.051	0.009
Community & Leisure	0.254	0.147	0.106
Regeneration & Planning	0.364	0.276	0.088
Director	0.000	0.000	0.000
<b>Grand Total</b>	<b>1.839</b>	<b>1.592</b>	<b>0.246</b>

5.3.2 Details of the projected unachieved savings for the services that fall within the remit of this scrutiny are detailed below: -

5.3.3 The variance of £0.088m in Regeneration and Planning is due to: -

- £0.009m subsidy in Winding House.
- £0.008m subsidy in Llancaich Fawr
- £0.068m subsidy in Cwmcarn Visitor Centre
- £0.001m subsidy from BMI.
- £0.002m from various sections mileage reductions not being achieved.

5.3.4 It is expected that the unachieved MTFP savings will be covered by other budget savings in the service areas.

## 5.4 Conclusion

5.4.1 Members are advised Regeneration and Planning is the only division within the Economy and Environment Directorate which is in the remit of this scrutiny committee. Overall, the Directorate provides a diverse range of front-line services to residents and businesses. The revised overall Directorate has a budget totalling £68.479m, with a projected net overspend of £2.164m (3.16% of total budget). The operational managers will endeavour to ensure that service net expenditure does not exceed the budget available.

## 6. ASSUMPTIONS

6.1 Assumptions linked to this report were detailed in the budget report to Council on 23rd February 2023.

6.2 The projected outturn position is based on actual income and expenditure details to the end of December 2023.

6.3 Forecasts have been made following discussions with Service Managers based on current information available.

## 7. SUMMARY OF INTEGRATED IMPACT ASSESSMENT

7.1 An IIA is not necessary for this Information Only Report.

## **8. FINANCIAL IMPLICATIONS**

8.1 As detailed throughout the report.

## **9. PERSONNEL IMPLICATIONS**

9.1 There are no direct personnel implications arising from this report.

## **10. CONSULTATIONS**

10.1 There are no consultation responses that have not been reflected in this report.

## **11. STATUTORY POWER.**

11.1 Local Government Acts 1972 and 2003 and the Council's Financial Regulations.

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### Consultees

Cllr G Johnston, Chair Corporate Services and Regeneration Scrutiny Committee  
Cllr A, McConnell, Vice Chair Corporate Services and Regeneration Scrutiny Committee  
Christina Harry, Chief Executive  
Mark S Williams, Corporate Director for Economy and Environment  
Rhian Kyte, Head of Regeneration and Planning  
Steve Harris, Head of Financial Services and S151 Officer  
Leanne Sykes, Deputy Head of Financial Services and S151 Officer  
Rachel Smith, Assistant Accountant  
Cllr J. Pritchard, Cabinet Member for Prosperity, Regeneration and Climate Change  
Cllr P Leonard, Cabinet Member for Planning and Public Protection  
Cllr C Andrews, Cabinet Member for Education and Communities

### Appendices:

Appendix 1A Budget Monitoring Report - Regeneration and Planning

Economy and Environment Directorate	Estimate 2023/24	Revised Estimate 2023/24	Anticipated Outturn 2023/24	Variance 2023- 24
<b><u>REGENERATION &amp; PLANNING</u></b>				
Regeneration & Planning Senior Management Support	186,880	241,580	230,953	10,627
Use of Reserves For Placeshaping Officer	(17,444)	0	0	0
<b>Support Services</b>				
Business Support & Urban Renewal	691,176	666,810	918,331	(251,521)
Use of Reserves For International Trade Support Officer	(19,827)	(19,827)	(19,481)	(346)
Agreed Use of Reserves for the Regeneration Strategy	0	0	(23,940)	23,940
Regen Board Funding(MDT) - 2507	0	0	0	0
Events	91,511	92,136	97,594	(5,458)
Property Operations	(1,036,488)	(1,036,488)	(928,254)	(108,234)
Town Centre Management	322,377	326,563	302,378	24,185
<b>Tourism Venues</b>				
Tourism Venues Management Support	84,071	85,073	81,854	3,219
Llanciach Fawr	499,280	508,430	503,305	5,125
Winding House & Museum	206,933	208,198	185,101	23,097
Caerphilly Visitor Centre	78,044	80,931	105,972	(25,041)
Cwmcam Visitor Centre	260,281	267,933	341,417	(73,484)
Blackwood Miners Institute	362,710	368,245	324,884	43,361
Arts Development	172,500	174,691	174,530	161
<b>Community Regeneration</b>				
Use of Reserves for Apprentice Gateway Scheme	40,375	6,815	32,705	(25,890)
	(3,210)	(3,210)	(2,438)	(772)
<b>Communities for Work Plus Additional Funding</b>				
Expenditure	1,687,435	1,687,435	1,475,254	212,181
Grant Funding	(1,687,435)	(1,687,435)	(1,475,254)	(212,181)
<b>UK Shared Prosperity Fund</b>				
Community & Places	2,020,288	1,935,479	1,560,587	374,892
Local Businesses	1,112,933	1,392,306	1,192,161	200,145
People & Skills	4,422,568	3,324,738	3,044,738	280,000
Multiply	2,176,315	2,232,794	1,208,980	1,023,814
SPF Admin	296,434	176,375	176,375	0
UKSPF Grant	(10,028,538)	(9,061,692)	(7,182,841)	(1,878,851)
<b>Planning Services</b>				
Planning Services Management	160,022	162,322	160,022	2,300
Regeneration & Planning Administrative Support	641,433	650,128	637,169	12,959
Strategic Planning	365,557	370,190	284,032	86,158
Transfer to Community Infrastructure Levy Ringfenced Reserve	0	0	106,133	(106,133)
Agreed transfer from Reserves for LDP	0	0	(29,120)	29,120
Development Control	416,405	429,783	358,249	71,534
Building Control	123,377	127,459	142,833	(15,374)
Land Charges	26,056	27,050	21,236	5,814
Land Registry Automation	(7,577)	(7,577)	(54,019)	46,442
GIS & Land Gazetteer	68,223	69,197	73,921	(4,724)
<b>TOTAL NET BUDGET</b>	<b>3,712,665</b>	<b>3,796,432</b>	<b>4,025,369</b>	<b>(228,937)</b>



## **CORPORATE AND REGENERATION SCRUTINY COMMITTEE – INFORMATION ITEM - 20TH FEBRUARY 2024**

**SUBJECT: 2023/24 CAPITAL EXPENDITURE MONITORING REPORT  
(PERIOD 9)**

**REPORT BY: CORPORATE DIRECTOR FOR EDUCATION AND  
CORPORATE SERVICES**

### **1. PURPOSE OF REPORT**

1.1 To inform members of the projected capital expenditure for the 2023/24 financial year.

### **2. SUMMARY**

2.1 This report provides details of actual and projected capital expenditure based on information available as at month 9 of the 2023/24 financial year.

### **3. RECOMMENDATIONS**

3.1 Members are asked to note the contents of this report.

### **4. REASONS FOR THE RECOMMENDATIONS**

4.1 To ensure that members are advised of projected spend for the 2023/24 Capital Programme.

### **5. THE REPORT**

5.1 The approved core Capital Programme for the 2023/24 financial year totals £47.289m, consisting of £11.636m for the General Fund and £35.653m for the Housing Revenue Account (HRA). The total Capital Programme budget for 2023/24 is £162.555m, this includes the 2022/23 slippage brought forward of £90.982m and additional in-year funding of £24.284m. Appendix 1 provides a summary by service as at period 9.

5.2 Actual expenditure as at period 9 has been reviewed and budget holders have provided updates on forecast spend for the remainder of the financial year. Schemes totalling £88.416m have been identified that relate to planned activity that will not be delivered in 2023/24, or schemes that are scheduled for delivery in future years. Consequently, these will be carried forward as slippage into future years. Members will note from Appendix 1 that the majority of the slippage relates to the Business

Enterprise Renewal Team (26%); Education (22%); Community and Leisure Services (16%); and Private Housing (10%).

- 5.3 As part of the Mobilising Team Caerphilly work, the capital programme has been reviewed. The capital budget going forward will be profiled over multiple financial years in line with forecast expenditure to ensure a robust and deliverable programme and allow for detailed financial performance and slippage to be reported on. As a consequence of this, the capital monitoring reports will change significantly for 2024/25 and will provide members with more detailed information in relation to both current and future projects.
- 5.4 Members are asked to note the following explanations for the significant capital variances and subsequent budget slippage into future years:
- Within Corporate Services, there is £4.732m that is currently unallocated to specific projects.
  - £14m of the Education slippage is in relation to monies set aside for planned 21<sup>st</sup> Century Schools Band B projects. Current projects that are in progress are the Trinity Fields extension, Centre for Vulnerable Learners, Llanfabon Primary School, Plasyfelin Primary School and Ysgol y Llawnt.
  - £2.715m of the Education slippage is in relation to Welsh Government (WG) Education grants that were received late in the financial year. Works have been identified but will take place during the summer of 2024.
  - Community and Leisure Services have £12.681m allocated in relation to the Caerphilly Health and Wellbeing Centre, this project will be delivered across multiple financial years.
  - Within the Business Enterprise Renewal Team there are a number of Caerphilly Placemaking projects which will be delivered across multiple financial years e.g. The Leisure quarter and Pentrebane Steet. However, the majority of the slippage is in relation to the Ness Tarr site for which we received a £20m interest free loan from WG in 2020. There are ongoing discussions taking place to determine how these monies will be spent.
  - As stated in the Capital Outturn Report, Private Housing's slippage has accumulated since Covid due to a backlog of applications for grants as a result of not being able to appoint contractors. A report is due to go to Cabinet in 2024 to provide further details on how the Private Housing slippage is to be spent.
- 5.5 The £8.372m slippage on HRA is due to the delay in progressing the Post Asset Management Strategy (PAMS) programme due to resource issues.

## 6. ASSUMPTIONS

- 6.1 The details set out in the report are based on actual expenditure between 1<sup>st</sup> April 2023 and 31<sup>st</sup> December 2023 and projected expenditure to 31<sup>st</sup> March 2024.

## **7. SUMMARY OF INTEGRATED IMPACT ASSESSMENT**

- 7.1 This report is for information purposes, so the Council's Integrated Impact Assessment (IIA) process does not need to be applied.

## **8. FINANCIAL IMPLICATIONS**

- 8.1 As detailed throughout the report.

## **9. PERSONNEL IMPLICATIONS**

- 9.1 There are no personnel implications arising from this report.

## **10. CONSULTATIONS**

- 10.1 There are no consultation responses that have not been reflected in this report.

## **11. STATUTORY POWER**

- 11.1 Local Government Acts 1972 and 2003.

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Consultees: Richard Edmunds – Corporate Director of Education and Corporate Services  
Stephen Harris – Head of Financial Services and S151 Officer  
Leanne Sykes - Deputy S151 Officer  
Andrew Southcombe – Finance Manager, Corporate Finance  
Cllr E. Stenner – Cabinet Member for Finance and Performance

Appendices:

Appendix 1 – Period 9 2023/24 Financial Summary

## Appendix 1

## Capital Monitoring 2023/24 P9

Service Area	B/f Funding	Core Capital Budget 23-24	Additional In Year Funding	Service Transfers	Total Available Capital Budget	Expenditure to 31.12.2023	Projected Expenditure to 31.03.2024	Slippage
Corporate Services-General	3,601	3,624	-	321	6,904	248	1,171	5,733
Education & Lifelong Learning	19,950	1,422	20,018		41,390	12,508	22,304	19,086
Community and Leisure Services	15,157	230	326	321	16,034	1,506	1,948	14,086
Business Enterprise Renewal Team	29,606	98	639		30,343	7,032	7,084	23,259
Infrastructure	5,007	2,572	1,717		9,296	3,900	6,470	2,826
Public Protection	2,506	493	1,296		4,295	3,155	3,211	1,084
Property Services	1,223	690			1,913	1,640	1,839	74
Social Services	5,334	340			5,674	859	1,040	4,635
Private Housing	8,598	2,167	288		11,053	941	1,792	9,261
<b>General Fund Total</b>	<b>90,982</b>	<b>11,636</b>	<b>24,284</b>	<b>-</b>	<b>126,902</b>	<b>31,789</b>	<b>46,859</b>	<b>80,044</b>
HRA	-	35,653			35,653	12,611	27,281	8,372
<b>Total</b>	<b>90,982</b>	<b>47,289</b>	<b>24,284</b>	<b>-</b>	<b>162,555</b>	<b>44,400</b>	<b>74,140</b>	<b>88,416</b>





## **CORPORATE AND REGENERATION SCRUTINY COMMITTEE – INFORMATION ITEM - 20TH FEBRUARY 2024**

**SUBJECT: TREASURY MANAGEMENT AND CAPITAL FINANCING  
PRUDENTIAL INDICATORS QUARTER 3 MONITORING  
REPORT (1ST APRIL 2023 TO 31ST DECEMBER 2023) –  
INFORMATION ITEM**

**REPORT BY: CORPORATE DIRECTOR FOR EDUCATION AND  
CORPORATE SERVICES**

### **1. PURPOSE OF REPORT**

- 1.1 To present Members with details of Treasury Management activities and Capital Financing, together with the related Prudential Indicators for the period 1<sup>st</sup> April 2023 to 31<sup>st</sup> December 2023.
- 1.2 To review the Treasury Management Strategy for 2023/24 as set out in the Annual Investment Strategy and Capital Financing Prudential Indicators Report.

### **2. SUMMARY**

- 2.1 In October 2010 the Authority adopted the Chartered Institute of Public Finance and Accountancy's Treasury Management in the Public Service: Code of Practice (the CIPFA Code) which requires the Authority to approve treasury management semi-annual and annual reports. This quarterly report provides an additional update.
- 2.2 This report includes the new requirement in the 2021 Code, mandatory from 1<sup>st</sup> April 2023, of quarterly reporting of the treasury management prudential indicators.
- 2.3 The Authority's Annual Treasury Strategy and Capital Financing Prudential Indicators for 2023/24 were approved by Council on the 23<sup>rd</sup> February 2023.

### **3. RECOMMENDATIONS**

- 3.1 Members are asked to note the contents of this report.

### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 Compliance with the CIPFA "Code of Practice for Treasury Management in the Public Services".

## **5. THE REPORT**

### **5.1 Treasury Management**

#### **5.1.1 Borrowing Activity**

The Authority is operating a policy of internal borrowing in order to reduce risk and keep its interest costs low. As at the 31<sup>st</sup> March 2023 the internal borrowing position was £51.2m.

The Annual Treasury Management Strategy was approved by Council in February 2023. As part of the strategy approval was given to borrow up to £46.8m in 2023/24 to part fund the General Fund capital programme if required. A further £450m was approved for the HRA to fund the WHQS and Affordable Housing capital programme. No external borrowing has taken place during the reported period.

During the period covered by this report, PWLB loans to the value of £5.1m were repaid on maturity, these loans had an average interest rate of 4.42%. The £30k final balance of the WRU Loan and £517k of the Salix Loan were also repaid. Total debt outstanding as at 31<sup>st</sup> December 2023 was £310m and comprised of £241.3m PWLB loans; £30m market loans (LOBOs); £10m Bank loan; £25.9m WG loans, and a £2.8m Salix Energy Finance loan.

With respect to the £30m LOBO loans, the lender has the option to propose an increase in the interest rate at set dates, following which the Authority has the option to either accept the new rate or to repay the loan at no additional cost. During the reporting period the total LOBO portfolio with a value of £30m had a rate option review, and the lenders chose not to exercise the option. The LOBO's represent 9.7% of the Authority's debt portfolio, which is exposed to interest rate risk.

The loans from Welsh Government are charged at zero interest providing the loan obligations are met, the loans will be repaid through future capital receipts generated from the projects.

#### **5.1.2 Rescheduling**

The Annual Strategy allows for the utilisation of debt rescheduling providing for both in- year and future year savings and additional revenue resources. No rescheduling opportunities were utilised during the period covered by this report.

#### **5.1.3 Investments**

During the reported period the Authority was holding £34.6m of long-term investments where the maturity date was greater than 365 days. These investments are in accordance with the approved Investment Strategy. The long-term investments comprise of UK Gilts, Bonds, Real Estate Investment Trusts (REITS) and pooled funds. The value of short-term deposits as at 31<sup>st</sup> December 2023 was £113.8m.

The total investments held as at 31<sup>st</sup> December 2023 were £148.4m and had a total income rate of return equating to 4.37%. The target rate which was set for return on investments in the Treasury Management Strategy 2023/24 was the base rate in place at that time of 3.50%. Over the reporting period, the base rate has increased from 4.25% to 5.25%, with an average rate of 4.93%. The overall return of 4.37% was below the target rate due to some historic investments which were made when interest

rates were significantly lower.

Investments in pooled funds allow the Authority to generate income returns and the intention is to hold them for a minimum of five years as per the Treasury Strategy 2022/23. These investments generated an income return of 5.21% during the reporting period.

The Authority continued to maintain its cash surpluses to subsidise the capital programme and delay any borrowing.

The portfolio as at 31<sup>st</sup> December 2023 comprised of the following types of investments:

Counterparty	Investment Product	Sector	£m
<b>Banks &amp; Building Societies</b>	Bonds and Fixed Term Deposits.	Financial	28.6
<b>Money Market Fund</b>	Cash Pooled Fund	Financial	28.3
<b>UK Government</b>	Gilts and DMO	UK Government	10.0
<b>Local Authorities and Housing Associations</b>	Fixed-term cash deposits	Local Government	62.0
<b>External Fund Managers</b>	Property Pooled Fund	Property	8.8
<b>External Fund Managers</b>	Bond Pooled Fund	Mixed	2.2
<b>External Fund Manager</b>	Equity Pooled Fund	Mixed	5.3
<b>External Fund Manager</b>	Multi Asset Pooled Fund	Mixed	2.3
<b>REIT</b>	Pooled Fund	Property	0.9
<b>Total Investments as at 31<sup>st</sup> December 2023</b>			<b>148.4</b>

**Statutory override:** In April 2023 the Department for Levelling Up, Housing and Communities published the full outcome of the consultation on the extension of the statutory override on accounting for gains and losses on pooled investment funds. The override has been extended for two years until 31st March 2025 but has been withdrawn in England from this date. The Authority will discuss with Arlingclose the implications for the investment strategy and what action may need to be taken if this override is also withdrawn in Wales.

#### 5.1.4 Economic Outlook

UK inflation rates finally started to decline, mirroring the sharp but earlier drop seen in the Eurozone and US. Despite the fall, the Consumer Price Index (CPI) remained substantially in excess in the Bank of England's (BoE) 2% target, at 3.9% for November 2023. Market expectations for further rises in Bank Rate fell from October through to year end, indicating that the 5.25% level reached in August 2023 was indeed the peak for Bank Rate.

Economic growth in the UK remained weak over the period, edging into recessionary territory. In calendar Q3 2023, the economy contracted by 0.1%, following no change in Q2. Monthly GDP data showed a 0.3% contraction in October, following a 0.2% rise in September. While other indicators have suggested a pickup in activity in the subsequent months, Q4 GDP growth is likely to continue the weak trend.

July data showed the unemployment rate increased to 4.2% (3mth/year) while the employment rate rose to 75.7%. Pay growth edged lower as the previous strong pay rates waned; total pay (including bonuses) growth was 7.2% over the three months to October 2023, while regular pay growth was 7.3%. Adjusting for inflation, pay growth in real terms were positive at 1.3% and 1.4% for total pay and regular pay respectively.

Inflation continued to fall from its peak as annual headline CPI declined to 3.9% (down from 4.6%) in November 2023. The largest downward contribution came from energy and food prices. The core rate also surprised on the downside, falling to 5.1% from 5.7%.

The BoE's Monetary Policy Committee held Bank Rate at 5.25% throughout the period, although a substantial minority continued to vote for a 25 basis point rate rise. The Bank continues to tighten monetary policy through asset sales, as it reduces the size of its balance sheet. Financial market Bank Rate expectations moderated over the period as falling inflation and weakening data showed that higher interest rates were working in the UK, US, and Eurozone.

The lagged effect of monetary policy together with the staggered fixed term mortgage maturities over the next 12-24 months means the full impact from Bank Rate rises are still yet to be felt by households. As such, while consumer confidence continued to improve over the period, it is likely this will reverse at some point and spending will struggle. Higher rates will also impact exposed businesses; according to S&P/CIPS survey data, the UK manufacturing and construction sectors contracted during the quarter. The services sector recovered, however, with the PMI rising strongly in December, possibly due to improving consumer confidence.

Gilt yields fell towards the end of the period. The 10-year UK benchmark gilt yield rose from 4.57% to peak at 4.67% in October before dropping to 3.54% by the end of December 2023. The Sterling Overnight Rate (SONIA) averaged 5.19% over the period.

Following the December MPC meeting, Arlingclose, the authority's treasury adviser, maintained its central view that 5.25% is the peak in Bank Rate. Short term risks are broadly balanced, but over the remaining part of the time horizon the risks are to the downside from economic activity weakening more than expected

Official Bank Rate	Upside Risk	Arlingclose (Central case)	Downside Risk
2024 Q1	0.25	5.25%	-0.25
2024 Q2	0.25	5.25%	-0.50
2024 Q3	0.50	5.00%	-0.75
2024 Q4	0.50	4.75%	-1.00
2025 Q1	0.50	4.25%	-1.00
2025 Q2	0.50	4.00%	-1.00
2025 Q3	0.50	3.75%	-1.00
2025 Q4	0.75	3.50%	-1.00

### 5.1.5 Borrowing Update

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 Authority.

PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield.

The authority is not planning to purchase any investment assets primarily for yield within the next 3 years.

A new PWLB HRA rate which is 0.4% below the certainty rate was made available from 15<sup>th</sup> June 2023. Initially available for a period of one year, this discounted rate is to support local authorities borrowing for the Housing Revenue Account and for refinancing existing HRA loans. This rate will now be available until June 2025.

The UK Infrastructure Bank, which is wholly owned and backed by HM Treasury, has been set up with £4bn of funding earmarked for lending to Local Authorities. Loans will be available for qualifying projects at gilt yield plus 0.4%, which is 0.4% lower than the PWLB certainty rate.

### 5.1.6 Counterparty Update

Arlingclose maintained the advised maximum duration limit for all banks on its recommended counterparty list to 35 days over the period.

In October, Moody's revised the outlook on the UK's Aa3 sovereign rating to stable from negative. This led to similar rating actions on entities that include an element of government support in their own credit ratings, including banks and housing associations. Local authorities were, however, downgraded on expectations of lower government funding.

Following the issue of a Section 114 notice, in November Arlingclose advised against undertaking new lending to Nottingham City Council. After reducing its recommended duration on Warrington Borough Council to a maximum of 100 days in September, the local authority was subsequently suspended from the Arlingclose recommended list following a credit rating downgrade by Moody's to Baa1.

Arlingclose continued to monitor and assess credit default swap levels for signs of ongoing credit stress, but no changes were made to recommended durations over the period.

Heightened market volatility is expected to remain a feature, at least in the near term and, as ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remains under constant review.

### 5.1.7 Non-Treasury Investments

The definition of investments in CIPFA's revised Treasury Management Code now covers all the financial assets of the Authority as well as other non-financial assets which the Authority holds primarily for financial return. Such investments can comprise of property; shared ownership housing; loans to local businesses/ subsidiaries; and shareholdings. During the reported period the Authority did not hold any non-treasury related investments.

## 5.2 **Prudential Indicators**

### 5.2.1 Capital Financing Requirement

The Capital Financing Requirement (CFR) measures the Authority's underlying need to borrow for a capital purpose. In accordance with best professional practice, the Authority does not associate borrowing with particular items or types of expenditure. In practice, the raising and repaying of loans is determined primarily by professional and expert advice and may not necessarily take place in the relevant year. In order to create an operating environment within which the Treasury Manager can legitimately react to appropriate advice, the various authorised limits as identified in Appendix 1 are set at a level in excess of the CFR. In the financial year to date, the Authority has been operating within the approved limits.

Appendix 1 shows a projected CFR value of £351.459m as at 31<sup>st</sup> March 2024. The actual CFR as at 31<sup>st</sup> March 2023 was £363.256m. Certain capital schemes have been delayed or the scheme extended which has resulted in a lower funding requirement than budgeted.

### 5.2.2 Prudential Indicators – "Prudence"

The Prudential Indicators for Treasury Management are shown in Appendix 1, and the Authority is currently operating within the approved limits.

### 5.2.3 Prudential Indicators – "Affordability"

There is a requirement to analyse and report the capital financing costs and express those costs as a percentage of the net revenue streams of the Authority. These are identified in Appendix 2 and currently show a projected reduction from the original

budget as a consequence of deferred borrowing for the General Fund. As a result of charging HRA for internal borrowing, their capital financing costs have increased.

#### 5.2.4 Capital Expenditure and Funding

A summary of capital expenditure and funding is attached at Appendix 3 and shows that there will be an underspend on the core capital budget. The original HRA budget was set on the 2022/23 business plan however this budget was subsequently revised downwards in the 2023/24 business plan.

### **6. ASSUMPTIONS**

- 6.1 The details set out in the report are based on actuals that have occurred between 1<sup>st</sup> April 2023 and 31<sup>st</sup> December 2023 (period 9).

### **7. SUMMARY OF INTEGRATED IMPACT ASSESSMENT**

- 7.1 This report is for information only and no Integrated Impact Assessment is required.

### **8. FINANCIAL IMPLICATIONS**

- 8.1 As detailed throughout the report.

### **9. PERSONNEL IMPLICATIONS**

- 9.1 There are no personnel implications arising from this report.

### **10. CONSULTATIONS**

- 10.1 There are no consultation responses that have not been reflected in this report.

### **11. STATUTORY POWER**

- 11.1 Local Government Acts 1972 and 2003.

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Consultees:  
Richard Edmunds – Corporate Director of Education and Corporate Services  
Stephen Harris – Head of Financial Services and S151 Officer  
Leanne Sykes - Deputy S151 Officer  
Andrew Southcombe – Finance Manager, Corporate Finance  
Cllr E. Stenner – Cabinet Member for Finance and Performance

Appendices:

Appendix 1 – Treasury Management Prudential Indicators – Prudence

Appendix 2 – Capital Finance Prudential Indicators – Affordability

Appendix 3 – Capital Expenditure and Funding



Appendix 1 Treasury Management Prudential Indicators- Period 9 Report (Quarters 1, 2 and 3)

	Budget 2023-24	Estimated 2023-24
	£000	£000
<b>Authorised limit for external debt -</b>		
Borrowing	501,210	501,210
Other long term liabilities	21,989	21,989
<b>Total</b>	<b>523,199</b>	<b>523,199</b>
<b>Operational boundary for external debt -</b>		
Borrowing	400,968	309,750
Other long term liabilities	21,989	21,989
<b>Total</b>	<b>422,957</b>	<b>331,739</b>
Capital Financing Requirement	381,503	351,459
<b>Upper limits for interest rate exposure</b>		
Principal outstanding on borrowing	400,968	309,750
Principal outstanding on investments	100,000	148,400
<b>Net principal outstanding</b>	<b>300,968</b>	<b>161,350</b>
<b>Fixed rate limit – 100%</b>	300,968	161,350
<b>Variable rate limit – 30%</b>	90,290	48,405
<b>Upper limit for total invested for over 364 days</b>	<b>60,000</b>	<b>60,000</b>

	Upper Limit	Lower Limit	Actual	%
<b>Maturity structure of fixed rate borrowing</b>				
<b>Under 12 months</b>	35%	0%	3,107	1%
<b>Over 12 months and within 24 months</b>	40%	0%	2,954	1%
<b>Over 2 years and within 5 years</b>	50%	0%	24,849	8%
<b>Over 5 years and within 10 years</b>	75%	0%	27,848	9%
<b>Over 10 years</b>	100%	0%	250,992	81%

	Budget 2023-24	Estimated 2023-24
	£000	£000
<b>Gross Debt and Net Debt</b>		
Outstanding Borrowing	400,968	309,750
Other long term liabilities	21,989	21,989
<b>Gross Debt</b>	<b>422,957</b>	<b>331,739</b>
Less investments	100,000	148,400
<b>Net Debt</b>	<b>322,957</b>	<b>183,339</b>

**Appendix 2 Capital Finance Prudential Indicators- Period 9 Report (Quarters 1, 2 & 3)**

<b>Ratio of Financing costs to net revenue stream</b>	<b>Budget 2023-24</b>	<b>Estimated 2023-24</b>
<b>General Fund</b>	<b>£000</b>	<b>£000</b>
Principal repayments	2,943	2,591
Interest costs	7,881	7,079
Debt Management costs	42	42
Rescheduling discount		
Investment income	-3,343	-4,989
Interest applied to internal balances	812	812
<b>Total General Fund</b>	<b>8,335</b>	<b>5,535</b>
Net revenue stream	422,327	422,327
<b>Total as percentage of net revenue stream</b>	<b>1.97%</b>	<b>1.31%</b>
<b>Housing Revenue Account</b>		
Principal repayments	1,864	2,624
Interest costs	5,930	5,568
Rescheduling discount		
Debt Management costs	38	34
<b>Total HRA</b>	<b>7,832</b>	<b>8,226</b>
Net revenue stream	53,075	53,075
<b>Total as percentage of net revenue stream</b>	<b>14.76%</b>	<b>15.50%</b>

<b>Capital financing requirement [end of year position]</b>	<b>Budget 2023-24</b>	<b>Estimated 2023-24</b>
	<b>£000</b>	<b>£000</b>
Council Fund	225,469	222,873
Housing Revenue Account	156,034	128,586
<b>Total Authority</b>	<b>381,503</b>	<b>351,459</b>

<b>Liability Benchmark</b>	<b>Budget 2023-24</b>	<b>Estimated 2023-24</b>
	<b>£000</b>	<b>£000</b>
Capital Financing Requirement	381,503	351,459
Less Balance Sheet Resources	-219,600	-204,600
<b>Net Loans Requirement</b>	<b>161,903</b>	<b>146,859</b>
Plus Liquidity allowance	10,000	10,000
<b>Liability Benchmark</b>	<b>171,903</b>	<b>156,859</b>

**Appendix 3 Capital Expenditure and Funding- Period 9 report (Quarters 1, 2 and 3)**

	<b>Budget 2023-24</b>	<b>Estimated 2023-24</b>
<b>Expenditure</b>	<b>£000</b>	<b>£000</b>
Council Fund	11,636	11,636
Housing Revenue Account	64,865	27,281
<b>Total</b>	<b>76,501</b>	<b>38,917</b>
<b>Funding</b>		
Surplus/ (Deficit) Balance b/f	287	287
Borrowings - Supported (GF)	4,821	
General Capital Grant - WG	4,951	4,951
Internal Borrowing		4,821
RCCO Budget	128	128
Capital underspends frm previous years		
General Fund working balances		
One off funding- MRP Review	1,449	1,449
RCCO- (HRA)	30,469	14,956
Borrowings - Unsupported (HRA)		
Borrowing - Unsupported (Affordable Housing)	27,100	
Major Repairs Allowance (HRA)	7,296	7,296
WG Grant		5,029
<b>Total</b>	<b>76,501</b>	<b>38,917</b>
<b>Surplus C/f</b>		



## **CORPORATE AND REGENERATION SCRUTINY COMMITTEE – INFORMATION ITEM – 20TH FEBRUARY 2024**

**SUBJECT: STRATEGIC EQUALITY PLAN ANNUAL REPORT 2022-2023**

**REPORT BY: CORPORATE DIRECTOR – EDUCATION AND CORPORATE SERVICES**

### **1. PURPOSE OF REPORT**

1.1 The report is to inform Members of the Council's draft Strategic Equality Plan Annual Report 2022-2023, prior to it going to Cabinet for approval and publication on the Council's website.

### **2. SUMMARY**

2.1 The Council has a statutory duty to produce an annual report on equalities issues under current legislation. The requirements are very detailed as to what relevant information must be included in the annual report (attached in full as Appendix 1).

2.2 The amount of information presented is therefore in order to ensure that the regulatory body involved (the Equality and Human Rights Commission) are provided with full evidence of the Council's compliance and commitment to those statutory duties.

2.3 The Strategic Equality Plan Annual Report must be published by the 31 March the following year.

### **3. RECOMMENDATIONS**

3.1 Corporate and Regeneration Scrutiny Committee for information, note the annual monitoring and improvement report prior to it being reported to Cabinet for approval and publication on the Council's website by the 31 March deadline.

#### **4. REASONS FOR THE RECOMMENDATIONS**

- 4.1 The council is required under the Equality Act 2010 (Statutory Duties)(Wales) Regulations 2011 to produce an annual report on the steps it has taken to meet the Public Sector Equality Duty, and its own equality objectives as set out in the Strategic Equality Plan 2020-2024.

#### **5. THE REPORT**

- 5.1 Under the Public Sector Equality Duty in Wales, an annual report on the Strategic Equality Plan must be published within 12 months after the end of the financial year that is covered by that report.
- 5.2 Appended to this report in Appendix 1 is the Strategic Equality Plan Annual Report 2022-2023.
- 5.3 The report gives an overview of consultation and engagement exercises we undertook during 2022-2023, which include:
- The Caerphilly Conversation – Council Budget Setting 2023-2024
  - Pontllanfraith Centre for Vulnerable Learners
  - Childcare Sufficiency Assessment
- 5.4 The report provides a brief snapshot of some key decisions the Council made during 2022-2023. Particular focus in the report has been given to:
- The Education Strategy 2022-2025 (Pursuing Excellence Together)
  - The Ukraine Resettlement Scheme
  - Participation Strategy 2023-2027
  - Review of Welsh Language Recruitment Practices
- 5.5 We celebrated and marked many significant calendar dates, including:
- Mental Health Awareness Week
  - Foster Care Fortnight
  - Gypsy, Roma and Traveller History Month
  - Armed Forces Day
  - Pride Month
  - Youth Work Week
  - Ukraine Independence Day
  - Black History Month
  - White Ribbon Day
  - Welsh Language Rights Day (Mae Gen i Hawl)
  - Holocaust Memorial Day
  - LGBT History Month
  - St. David's Day
  - International Women's Day

5.6 Also highlighted in the report are two case studies, with each in their own right making a positive difference to the lives of residents with protected characteristics. The two case studies are:

- Communities for Work Plus (CfW+)
- Policy on Awarding Grants (Welsh Language)

5.7 Overall, progress against the actions in the Strategic Equality Plan 2020-2024 are progressing well, if not already completed.

#### 5.8 **Conclusion**

The report demonstrates the Council's progress during the financial year 2022-2023 against the actions in the Council's Strategic Equality Plan 2020-2024.

5.9 The report will be taken to Policy and Resources Scrutiny Committee on 20 February followed by Cabinet on 6 March 2024 for formal approval and publication on the Council's website.

### 6. **ASSUMPTIONS**

6.1 No assumptions have been made in preparing this report.

The information and data detailed in the report are progress updates from across service areas on implementing the Strategic Equality Plan 2020-2024 and meeting the equality objectives during 2022-2023.

### 7. **SUMMARY OF INTEGRATED IMPACT ASSESSMENT**

7.1 A full Equalities Impact Assessment and consultation was undertaken on the Strategic Equality Plan 2020-2024 when being developed, therefore no full assessment has been made on this annual report. The report itself is an assessment of work and progress made by the Council under the Strategic Equality Plan 2020-2024 and progress against the actions.

[Link to IIA](#)

### 8. **FINANCIAL IMPLICATIONS**

8.1 There are no direct financial implications to this report as the annual report covers work already undertaken in the previous financial year.

### 9. **PERSONNEL IMPLICATIONS**

9.1 Equalities data is included in the Workforce Development Strategy 2021–2024. In accordance with the action plan contained within the Strategy, work is ongoing to refine and enhance our equalities data with a view to reporting

and publishing data to align with March 2023. Following the additional funding for Workforce Development staff, the collation of training data is also a focus in line with the action plan.

## **10. CONSULTATIONS**

- 10.1 The report is based on information and data gathered across service areas on implementing the Strategic Equality Plan 2020-2024 and meeting the equality objectives during 2022-2023.
- 10.2 This report has been sent to the Consultees listed below and all comments received are reflected in this report.

## **11. STATUTORY POWER**

- 11.1 Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011  
Equality Act 2010 (Specific Duties and Public Authorities) Regulations 2017  
Welsh Language (Wales) Measure 2011  
Well-being of Future Generations Act (Wales) 2015  
Human Rights Act 1998  
Local Government (Wales) Measure 2011

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Consultees: Dave Street, Deputy Chief Executive  
Richard Edmunds, Corporate Director – Education and Corporate Services  
Cllr Eluned Stenner, Cabinet Member for Finance and Performance  
Cllr Philippa Leonard, Equalities Champion  
Sue Richards, Head of Transformation and Education Planning and Strategy  
Lynne Donovan, Head of People Services  
Keri Cole, Chief Education Officer  
Robert Tranter, Head of Legal Services and Monitoring Officer  
Kathryn Peters, Corporate Policy Manager  
Allan Dallimore, Regeneration Services Manager  
Christopher Hunt, Regional Community Cohesion Coordinator  
Elizabeth Rees, HR Management Information Officer  
Elizabeth Sharma, Consultation and Engagement Officer  
Emma Bush, Educational Psychologist  
Geraint Ashton, Policy Officer – Equalities and Welsh Language  
Huw Jordan, Housing Strategy Officer  
Jamie Duggan, School Improvement Officer  
Jo Williams, Assistant Director Adult Services  
Karen Pugh, Senior Manager, Libraries  
Karen Williams, Customer Services Digital Hub Manager

Kevin Eadon-Davies, Green Space Strategy and Cemeteries Manager  
Lewis John, Principal Information Officer  
Lisa Lane, Head of Democratic Services and Deputy Monitoring Officer  
Lisa Rawlings, Regional Armed Forces Covenant Officer  
Louise Aston, Lead Employment Support Officer  
Marcus Lloyd, Head of Infrastructure  
Mike Headington, Green Spaces and Transport Services Manager  
Nick Rutter, Digital Communications Officer  
Nick Taylor-Williams, Head of Housing  
Paul Jones, Area Adult Education Manager  
Rhian Kyte, Head of Planning and Regeneration  
Ros Roberts, Business Improvement Manager  
Sarah Mutch, Early Years and Partnerships Manager  
Shaun Sansom, Innovation and Transformation Enterprise Architect

### **Background Papers:**

- Strategic Equality Plan 2020-2024 - **Caerphilly - Caerphilly County Borough**
- Compliance Notice – Section 44 Welsh Language (Wales) Measure 2011 - **[compliancenotice.aspx \(caerphilly.gov.uk\)](#)**
- Report to Cabinet on the 14 June 2023 – **Welsh Language Standards Annual Report 2022-2023**
- Various Guidance Documents (*These are available electronically for information on the Intranet Portal and on the Council's website at [www.caerphilly.gov.uk/equalities](http://www.caerphilly.gov.uk/equalities)*)

### **Appendices:**

**Appendix 1** – Strategic Equality Plan Annual Report 2022-2023



# **Caerphilly County Borough Council Strategic Equality Plan Annual Report 2022-2023**

**Published 30.03.2024**

**This report is available in Welsh, and in other languages and formats on request.  
Mae'r ddogfen hon ar gael yn Gymraeg, ac mewn ieithoedd a fformatai eraill ar gais.**

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## Contact

If you have any comments or would like to know more please contact:

Equalities and Welsh Language Team - [equalities@caerphilly.gov.uk](mailto:equalities@caerphilly.gov.uk) / 01443 864404

## **Introduction**

A key part of our collective 'Team Caerphilly' ethos is to create an organisation – and a wider community – where everyone is treated equally and fairly in all aspects of everyday life.

We believe that nobody should be discriminated against or placed at a disadvantage because of their identity or background. It is important that we reflect this approach in everything we do, at all levels across the organisation.

This key strategic document has been developed to provide a robust framework, which will help ensure there are no barriers to prevent anyone accessing our services at any time.

I would like to thank all those involved in developing this strategy and we must now focus on implementing the key actions that will help deliver positive outcomes for all.

As we look forward, we will continue to strengthen our approach to equality and diversity through staff training and development, adopting good practice from elsewhere and by learning from partners.

**Christina Harray, Chief Executive, Caerphilly County Borough Council**

The needs of our communities are constantly changing, so it is important that we are able to adapt and flex as an organisation accordingly.

Diversity is at the heart of this change agenda and we have a collective duty to tackle all types of discrimination and encourage greater community cohesion. We must work together to create communities where everyone feels respected and safe from harassment.

As one of the area's biggest employers, we are also committed to achieving equality across all our services through positive employment practices, effective policies and learning from others.

This plan will help us achieve this and it is important that we continuously monitor and review our progress, as well as keeping all our key stakeholders updated to help raise awareness of the all the positive work that is being done.

We will continue to build on our success and take positive steps to promote equality, diversity and respect in all that we do.

**Cllr. Sean Morgan, Leader, Caerphilly County Borough Council**

## About Us

The Caerphilly county borough covers an area stretching from the Brecon Beacons National Park in the north, to Cardiff and Newport in the south. It is bordered to the north by Merthyr Tydfil, the west by Rhondda Cynon Taf, and to the east by Blaenau Gwent and Torfaen local authorities.

We provide services to approximately 176,000 residents living across a mixture of urban and rural communities, living in 76,000 households. The 2021 Census showed that 40.9% of our population is aged over 50 years; we know that this figure will increase proportionately as life expectancy increases.

The Council is the 5th largest local council in Wales and is the largest employer in the area. The Council employs just over 8,000 staff with 73% of them living in the county borough. They are employed into a variety of different roles within service areas which make up the following Directorates:

- Corporate Services and Education
- Social Services and Housing
- Economy and Environment

In relation to protected characteristics we have growing diversity in terms of ethnicity and national identity, and more people are more open to stating their gender identity and sexual orientation. We have a higher proportion of people with no qualifications than the Wales average, 24.1% as compared to 19.9% for Wales, and a lower proportion of people with level 4 qualifications or above, 25.3% as compared to 31.5% for Wales. However, the economic activity of our population is broadly comparable to the Wales average with 53.2% of females and 60.6% of males in work. Changing working patterns show that 23.9% of people now work mainly from home, with 59.7% travelling to work by car or van. 4% of our residents have served in either the UK regular or reserved armed forces.

The Directorates are headed by Corporate Directors who together with the Chief Executive, and Deputy Chief Executive, make up the Corporate Management Team who oversee the delivery of the Council's business, including delivery of this plan.

The Council operates a cabinet style of local government which is led by a Leader and who is supported by 9 Cabinet Members. We have 69 elected Councillors who have a variety of roles including agreeing the Council's policy framework, council tax and budget.

The Council delivers over 600 services to the county borough to ensure our people and place are thriving and resilient. From early years support to social care, schools to care homes, environmental protection and infrastructure, provision of social housing, planning, public protection, economic regeneration, and transport planning etc. Our breadth of responsibilities is wide ranging and increasing.

We face significant challenges, the financial outlook for the Council is of serious concern, and the projections for government financial support are worsening year on year. We must reshape and repurpose our services to ensure we can meet the challenges head on and continue to support our people and place.

## Context and Legislation

The Strategic Equality Plan 2020- 2024, to which this report relates, has been developed to primarily demonstrate the Council's commitment to meeting the Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011.

It highlights links to legislation and regulations covering the Welsh Language Standards and Human Rights issues and how it supports four of the seven aims of Welsh Government's Well-being of Future Generations (Wales) Act 2015; A healthier Wales, A more equal Wales, A Wales of cohesive communities and A Wales of vibrant culture and thriving Welsh language. It also outlines how the council will meet its responsibilities under the Public Sector Equality Duty, to advance equality and inclusion for all protected groups.

Building on our previous equalities work the plan explains to staff, citizens, stakeholders and elected members, how Caerphilly County Borough Council intends to deliver its equalities commitments whilst continuing to be an inclusive organisation that does not tolerate discrimination of any kind.

To assist us in writing our Plan, we engaged with our citizens, staff, stakeholders and elected members. We also used a range of equality information, which supported us in defining what would be our equality objectives for the next 4 years, and by listening to them, we hope that these objectives are both meaningful and achievable for us to deliver.

We looked at what priorities there were to consider both nationally and at a council level, and based them on what evidence we had available to us to support the work. A lot of work has been undertaken over the years into assessing our progress against the Public Sector Equality Duty through service plans and the self-assessment process.

We considered external sources of information such as reports by the Equality and Human Rights Commission and Welsh Government, policies and priorities, research reports and other relevant statistics available to help us. A number of external reports undertaken by the Equality and Human Rights Commission have supported and influenced the development of our new equality objectives.

Sources of information include:

- Anti-racist Wales Action Plan
- LGBTQ+ Action Plan
- Census 2021 data.

## How We Meet the Duty

The Council's equalities statement makes its commitment clear:

The Council recognises that people have different needs, requirements and goals and we will work actively against all forms of discrimination by promoting good relations and mutual respect within and between our communities, residents, elected members, job applicants and workforce.

We will also work to create equal access for everyone to our services, irrespective of ethnic origin, sex, age, marital status, sexual orientation, disability, gender reassignment, religious beliefs or non-belief, use of Welsh language, BSL and other languages, nationality, responsibility for any dependents or any other reason which cannot be shown to be justified.

Respect for diversity is a key issue as our communities change and develop in the 21<sup>st</sup> century. We must respect what has been before and the achievements up to that point but we must also accept and respect that things have changed and continue to evolve. We must be respectful for every individual who lives or works here, who represents or who visits the county borough.

Council services must reflect these diverse needs and Caerphilly County Borough Council already has a strong background in delivering accessible services in a sensible, measured and cost-effective way. Local government finances are increasingly under challenge and any changes have to take into account the impact on the most vulnerable in society through Integrated Impact Assessments, which carry the full authority of the Strategic Equality Plan.

This Strategic Equality Plan Annual Report evidences the monitoring undertaken to review the impact of the progress we have made to meet the actions of the Equality Objectives. Relevant information is collected from internal and external sources including public consultation exercises, Census data, local hate crime data or Integrated Impact Assessments. This report once approved, will be published and promoted widely both internally and externally in order to raise awareness of the work being undertaken.

## Collection of Council Performance, Data and Information

### The Council's Performance

The Council continues to deliver against the actions set in the [Strategic Equality Plan 2020-2024](#), focussing on making services as accessible as possible and to engage more with our residents.

The Council developed an Integrated Impact Assessment Template in April 2021, in accordance with the Socio-economic Duty. This has helped ensure that services understand and consider the impact any proposals have on protected characteristics, the Welsh language, the Socio-economic Duty, and the Future Generations Act. By linking the assessment to the reports going forward for a decision, it ensures that decision-makers are well informed and able to understand the impacts when it comes to our decision-making process.

The Council has integrated equalities and Welsh language into the Directorate Performance Assessments (DPAs) so that when reporting on progress by directorate, there is an integrated view of service delivery.

The [Welsh Language Standards Annual Report 2022-2023](#) showed that we received one complaint which related to the Welsh Language during this financial year. The complaint raised a number of issues, but reference to the Welsh language related to the complainant wishing to only receive correspondence in English. The response to the complainant explained why in some instances the Council must provide bilingual communication and outlined the relevant Welsh Language Standards.

The Council published its second [Five Year Welsh Language Strategy 2022-2027](#) and this can be viewed on the website along with all supporting documentation.

There was another increase in the number of Welsh speaking staff recorded on our HR system for 2022-2023 across all three directorates. There was also an increase in the number of staff learning Welsh across the organisation with the figure almost doubling on the previous year with 61 recorded. This coincides with us changing the way staff are offered courses and the process for registering on a course. It is now a much more streamlined process which has helped reduce our administration time.

It is evident from the content of the report that there has been some progress during 2022-2023. Over the next 12 months, the Council will continue to ensure that services are being delivered in line with the Welsh Language Standards. The Council will also work with service areas to identify and address any Welsh Language training or Welsh Language skills requirements to deliver services.

### Collection of Relevant Information

When considering and gathering information to include in the annual report, we used the Strategic Equality Plan 2020-2024 Action Plan as a template. Service areas hold information that could assist the council in identifying how it is meeting the General and Specific Duties, Heads of Service were contacted and asked to provide a progress update for their service area against each of the relevant actions.

We looked at council reports that had been written during the 12 months to gather relevant information to provide the bigger picture of the work undertaken, and which shows equalities at the heart of the decision-making process. Most council reports had a completed Integrated Impact Assessment to evidence the equalities considerations of the proposal.

We also used employment monitoring data, which is provided via the council's HR system. The employment data provided within this report also includes teachers and school-based employees.

The Strategic Equality Plan Action Plan can be accessed via the Council's website: [Strategic Equality Plan 2020-2024](#)

## Sources of Information

When considering what information should be used, it was important that areas of good practice were identified across service areas to demonstrate that a commitment to delivering equality exists throughout the Council. Information used in this report includes:

- The Council's Corporate Plan (2018-2023)
- Service delivery/projects (2022-2023)
- Employment practices
- Consultation and engagement programme
- Integrated Impact Assessments (2022-2023)
- Employment monitoring information (2022-2023)
- Monitoring and delivery of the SEP Action Plan (2022-2023)
- Annual Self-Assessment Report (2022-2023)

## Non-Collection and Effectiveness of Information

Equalities and Welsh Language data is still collected as part of the Directorate Performance Assessment across all Directorates of the Authority, but we continue to review what type of information should be collected and reported to ensure this is still relevant. Some of the information is escalated up to Corporate Performance Assessment for example Welsh Language data and complaints with an equalities and/or Welsh language element. The information is fed into the annual Self-Assessment report, which is an evidence based self-evaluation of how effective the Council's organisational effectiveness is. The Self-Assessment is going to Governance and Audit Committee in February 2024, Joint Scrutiny and Cabinet after that, as part of our commitment to 'mainstream' inclusivity as part of our day-to-day activity.

Joint Scrutiny identified in 2022 they would like more data on the gender balance across the workforce in the Self-Assessment. Therefore, we are looking to expand more of this data and are currently working on this for our second self-assessment with further analysis, to continue routine monitoring throughout 2024. Equalities data and its analysis is part of continuous improvement of performance reporting.



## **Inclusive Engagement and Participation (Equality Objective 4)**

Endorsed by the Council's Cabinet in February 2020 our 'Consultation and Engagement Framework' outlines the following principles:

- We will empower our residents to have greater influence over the issues that affect them
- We will increase and strengthen the role of communities in how we live, work and visit Caerphilly county borough
- This will help us to understand the needs of our communities, which in turn, will help to ensure the services we deliver meet those needs, and that available resources are used effectively and in line with agreed priorities
- We will support communities to take action, by helping them identify needs and support them in developing community led solutions.

Our internal consultation and engagement working group has become a key mechanism to disseminate information, share good practice and embed these principles with staff across the organisation and in turn, further improves engagement practices.

<https://www.caerphilly.gov.uk/CaerphillyDocs/Consultations/Consultation-and-Engagement-Framework.aspx>

The strategic principles of the Equalities Act 2010 and Wales specific duties, the National Principles for Public Engagement in Wales (updated in 2022) and the law of consultation are embedded throughout the framework document.

The shift towards digital engagement was accelerated during the pandemic with a greater use of social and digital media. We recognise that whilst digital engagement reduces barriers for some and provides an invaluable channel for engaging our communities, it can present difficulties for others. We have adopted a creative approach to ensure that everyone is able to get involved and have their say in a way that best suits their needs and public facing consultation and engagement activities continue to be promoted proactively on the front page of the Council's website and across digital channels. We have worked hard to re-engage with our communities face-to-face wherever this is appropriate and necessary which is particularly important for those with protected characteristics, those who are economically disadvantaged and those who are digitally excluded. Face-to-face engagement allows us to gain a deeper insight into understanding what matters to our communities. We continue to work with existing networks and groups using their established methods of engagement.

Key actions that have helped in the delivery of this objective during 2022-23 include:

- The development of a new digital engagement platform called "The Caerphilly Conversation" to be launched in April 2023. This will act as a central repository for all consultation and engagement activities across the Council and provide a number of online interactive engagement tools including mapping, quick polls and online discussion boards. To find out more please visit: <https://conversation.caerphilly.gov.uk/>
- Following the establishment of our internal Consultation and Engagement Working Group, the group has continued to meet quarterly to coordinate and share engagement plans and good practice. An action plan has been developed

for the group and a database of planned activity is updated on a quarterly basis. The group has been particularly useful in bringing together officers, including the Caerphilly Cares team and the Youth Service, who work with all sectors of our communities to support engagement with underrepresented groups.

- The Community Empowerment Fund was created to enable communities to develop and deliver projects aimed at meeting the needs of their residents. One of the criteria of this fund is to “Increase active inclusion and develop opportunities for enhanced engagement for groups that are more vulnerable and harder to reach”. In the 2022/23 period, the Community Empowerment Fund provided grants to over 80 organisations from across the county borough.
- Continued membership of the Co-production Network and training and support offered by this.
- Establishment of the ‘Caerphilly Cares’ approach. This is a long term model for offering holistic support to Caerphilly county borough residents. ‘Caerphilly Cares’ aims to offer individuals a single point of contact, to assist them in getting to the root cause of their issues and linking them up with existing services, both within Caerphilly County Borough Council and with partners, including the voluntary sector and local community groups, supporting that individual through their journey with those various services, from end to end.

Further details of current engagement activities can be found, including links to live surveys where appropriate, and to the outcomes of recent engagement activities by visiting: <https://conversation.caerphilly.gov.uk/>

Some of the key consultation/engagement activities are outlined below:

### **The Caerphilly Conversation**

[Join the Caerphilly Conversation | Council Budget Setting 2023-2024 | The Caerphilly Conversation](#)

A two-stage engagement process was undertaken through the “What Matters” conversations between 7th November to 6th December 2022 followed by a formal budget consultation from 19th January to 8th February 2023.

Like all councils in Wales and across the UK, we are facing budget pressures and in order that we can protect the things that are most needed we have been asking our residents, through an ongoing conversation, which council services are most important to them. Their feedback is helping us to continue focusing our efforts on the issues that most impact on them and ensure that the services we deliver are in line with residents’ needs.

### **Pontllanfraith Centre for Vulnerable Learners**

<https://www.caerphilly.gov.uk/involved/consultations/pontllanfraith-centre-for-vulnerable-learner>

The 21st Century Schools and Colleges programme is a major, long-term, strategic capital investment programme. It is jointly funded by the Welsh Government and local authorities and aims to create a generation of 21st century schools in Wales.

A consultation was undertaken on the establishment of a Centre for Vulnerable Learners (Pupil Referral Unit) on the former Pontllanfraith Comprehensive School site between 7<sup>th</sup> October 2022 and 7<sup>th</sup> November 2022. It is a statutory requirement to make available the draft application for review and comment prior to its formal submission for Planning Approval.

### **Childcare Sufficiency Assessment**

<https://www.caerphilly.gov.uk/involved/consultations/childcare-sufficiency-assessment-2022>

The Childcare Sufficiency Assessment must measure the nature and extent of the need for, and supply of, childcare in the area. Effective consultation is a core element of the sufficiency assessment and gives those with an interest in childcare an opportunity to highlight relevant issues or concerns. This consultation ran between 9<sup>th</sup> May 2022 and 5<sup>th</sup> June 2022.

## Snapshot of Key Decisions

The following section highlights a brief snapshot of some key decisions the Council put in place during the last 12 months. They demonstrate our compliance and commitment to the Public Sector Equality Duty, Socio-economic Duty and Welsh Language (Wales) Measure 2011.

### **Education Strategy 2022-2025 (Pursuing Excellence Together)**

The Education Strategy redefines the vision for all children, young people and adults accessing education in Caerphilly County Borough council. 'Pursuing excellence together' will further develop the culture of trust, strong working relationships and a passion for making a difference that have underpinned our collective response to the recent challenges. While learner aspiration can sometimes be constrained by circumstance, they should never be defined by it. Our new vision is a public commitment to continuously seek out, promote and share excellence throughout our education system in order to deliver sustained improvement over the coming years.

The new Education Strategy 2022-25 sets out to identify and re-set the educational priorities for Caerphilly post Covid-19 and for the next three years. The Strategy also outlines how we will know if we are making a difference to children and young people, through a set of principles for evaluation and improvement both at school and Local Authority level. The approach fits coherently with the responsibilities linked to:

- the Curriculum for Wales,
- the Additional Learning Needs (ALN) and Tribunal Act (2018),
- the Wellbeing of Future Generations Act,
- Welsh Government Renew and Reform post-Covid-19,
- the Tertiary Education Bill,
- the Sustainable Communities for Learning programme,
- Children's Rights in Wales,
- Flying Start and Childcare,
- Parenting & Inequality strategy and the universal offer of free school meals for primary pupils.

The Strategy recognises the cost-of-living pressures being faced by families across the County Borough and it will seek to alleviate those and reduce the impact of poverty and disadvantage on the educational achievement of affected learners and supports:

### **Equality Objective 2: Education, Skills and Employment – Improve education opportunities for all.**

#### **Ukraine Resettlement**

The Ukraine crisis began during March 2022. The UK Government offered several visa routes to arrivals; an extension of the visas of people already living here, the Ukraine Family Scheme whereby extended family members could apply for a 3-year visa to live and work in the UK, and the Homes for Ukraine Scheme where local families offer up a space in their homes, or self-contained accommodation to arrivals from Ukraine.

In addition, as a nation of sanctuary the Welsh Government agreed a super-sponsor route, where arrivals could apply for visas with the support and sponsorship of Welsh Government.

In terms of arrivals into the county borough many local families/individuals have offered up a room or property to Ukrainian individuals or families. By March 2023, 113 arrivals were living with hosts, 78 arrivals via the Homes for Ukraine scheme, and 35 guests via the Welsh Government Super Sponsor route.

Families integrated well, and a dedicated Ukraine Arrival Liaison post was created with a Ukraine national supporting the Council's resettlement officers in welcoming the cohort. Several social events to assist with integration and support for hosts have also taken place.

Ukrainian's have been given status like other domestic households for allocation via the common allocation policy and via the common housing register. The allocation policy is being amended to reflect this change by Welsh Government. We await further guidance on how housing and accommodation is accessed by the Ukrainian nationals during this humanitarian crisis. Our work with Ukrainian nationals directly supports:

### **Equality Objective 3: Community Cohesion – Promote and facilitate inclusive and cohesive communities.**

#### **Participation Strategy 2023-2027**

Local authorities in Wales must, under the Local Government and Elections (Wales) Act 2021, publish a Participation Strategy that sets out the ways in which local people are encouraged to participate in decision making by the council.

The Council's Consultation and Engagement Framework 2020-2025, adopted in February 2020, confirms the commitment to ensuring high quality, citizen focussed services for the communities that comprise our county borough. In future-proofing public services, the council recognises the need to ensure effective engagement is central to decision making - involving residents in the design of local services and the things that affect them.

- The Consultation and Engagement Framework 2020-25:
- Highlights the importance of effective consultation and engagement and the clear strategic link to the decision making process
- Demonstrates the key role that engaged, empowered communities have in supporting the future-proofing public services.
- Provides a clear definition of engagement and outlines the spectrum of engagement.
- Outlines the principles and standards that underpin meaningful engagement and consultation to enable a consistent, transparent and high-quality approach to the planning and undertaking of community engagement.

The Participation Strategy, in reaffirming these commitments in line with the Local Government and Elections (Wales) Act 2021, seeks to build further on this work, ensuring the council is open and responsive to the needs of its communities.

The Local Government and Elections (Wales) Act 2021 places a number of duties on local authorities regarding participation. These are to:

- Promote awareness of the functions the council carries out to local residents, businesses and visitors.
- Share information about how to go about becoming an elected member and what the role of councillor involves.
- Provide greater access to information about decisions that have been made, or that will be made by the council.
- Provide and promote opportunities for residents to provide feedback to the council, including comments, complaints and other types of representations.
- Promote awareness of the benefits of using social media to communicate with residents to Councillors.

The Participation Strategy reaffirms the council's commitment to listening, conversing with and responding to the needs of our communities - building clear, shared expectations and two-way engagement, and clearly demonstrates how the participation duty is being fulfilled.

In developing the strategy, an in-depth audit of existing resources and activity was carried out by, and engagement with communities through the council's ongoing engagement programme 'The Caerphilly Conversation' has highlighted some key areas that have shaped the objectives within this strategy. It is anticipated that further community engagement will continue to help shape the strategy's delivery, evolving over time as the benefit of new conversations, ideas and national best practice become evident.

Each objective within the Strategy includes a set of measurements to support the evaluation process. Consultation and engagement is currently reported through the council's annual self-assessment report and it is proposed that this would be extended to include the actions within the Participation Strategy. Our work on the new Participation Strategy directly supports:

**Equality Objective 4: Inclusive Engagement and Participation – Engage with citizens to encourage participation, to have their voices heard when planning service delivery**

#### **Review of Welsh Language Recruitment Practices**

In January 2022, the Council received correspondence from the Welsh Language Commissioner relating to the Council's duty to comply with Standards 8, 9, 11, 17, 52, 55, 56, 136A, 137, 137A and 139. Standards 136A, 137, 137A and 139 relate to the Council's recruitment process.

A forward work plan was developed to address a number of urgent matters relating to recruitment.

## Recruitment Action Plan – Web Recruitment and Welsh Translation

Actions	Date	Progress
CCBC Internet – Redesign content of Job Pages	Completed	CCBC Internet Job Pages (Outside of ITrent) have been redesigned to support the customer experience. The web recruitment introductory pages including the supporting information and documentation contained therein are 'live'. (English and Welsh views). Evidence of this progress below.
Redesign English Web Recruitment view within iTrent.	Completed	Midland HR consultants supporting ITrent have been consulted and the web recruitment view within ITrent has presented limited opportunity to influence the overall design. Navigation around the site and the main content area however have been updated in line with the recruitment forward plan to support the user experience.
Produce a streamlined CCBC job application form	Completed	A tested and final streamlined CCBC job application form inclusive of help text and in an easier to complete format, has been produced within the ITrent test environment for the purpose of data extraction and Welsh translation.
Web Recruitment Welsh Language	12/08/2022	<p>Aligned to and following the work above, the work relating to data translation configuration; the tables that require translation and the data extraction of those tables for translation was completed 08/06/2022.</p> <p>The extracted tables inclusive of the streamlined CCBC application form and automated messages has of the 09/06/2022 been sent for translation.</p> <p>On receipt of the translation, the translated converted tables will be reimported back into ITrent 'test' environment and the URL supporting the Welsh view will be enabled. Midland HR Consultancy and the Council's Equalities and Welsh Language Team are on standby to support the testing of the web recruitment life cycle in this capacity.</p>
BPR Recruitment Administration Processes- Analyse current processes and procedures to cover cohesive Welsh Language into recruitment campaign	30/09/2022	<p>The Welsh translation of documents and forms that sit outside of the translation configuration tables referred to above, such as invite to interview, reference requests and job descriptions have been prioritised for translation.</p> <p>Following a successful test with the support of Midland HR and the Council's Equalities and Welsh Language Team, training of the Clerical and HR Assistant Team whose roles support the recruitment process will be in place for the next stage of 'Testing' before Going 'Live'. Requisitions will be raised in the Welsh language and all posts advertised to incorporate the Welsh and English languages simultaneously.</p>

The following screenshots of webpages and an example job description, are evidence of some of the progress made to date. These were developed to recruit the recent apprentice posts we had created:



To assist with the translation of the recruitment pages and their content, we recruited a Welsh Translator to facilitate this. They commenced their role in February 2023.

[Web Page - Jobs with Caerphilly Council](#)

Our improvements to our recruitment practices directly supports:

**Equality Objective 5: Welsh Language – To ensure the Welsh speaking public can access services that comply with the statutory requirements.**

## Summary

Detailed examples of what went well in 2022-2023 are detailed in the Council's Annual Self-Assessment 2022-2023. To view the report click [here](#).



## Equalities Promotion Work and News Stories

In 2022-2023, the Council marked a number of awareness days either by raising awareness through press releases and or social media posts. The following were celebrated/marked either publicly or internally with staff:

### April 2022

- [Welcome evening for hosts and Ukrainian guests](#)

### May 2022

- [Gwent Royal British Legion 100th Birthday Commemoration](#)
- Mental Health Awareness Week



- Foster Care Fortnight



### June 2022

- [Gypsy, Roma and Traveller History Month](#)
- [Proud Councils nominated for a PinkNews Award](#)

➤ [Ffilifest](#)

The Council's second [Five Year Welsh Language Strategy 2022-2027](#) strategy was launched at Ffilifest 2022 by the Leader Cllr Sean Morgan and the Mayor Cllr Elizabeth Aldworth.



➤ [Caerphilly Veterans Support Hub](#)

➤ [Armed Forces Day](#)

➤ [Pride Month](#)

A Year 10 assembly was held at Ysgol Gyfun Cwm Rhymni to celebrate Pride month, which was delivered by the Council's Senior Policy Officer and Policy Officer for Equalities and Welsh Language. The assembly focussed on being different and what the term LGBTQ+ means



➤ **Pride of Pengam**

The Council's Senior Policy Officer and Policy Officer for Equalities and Welsh Language also delivered an assembly at Lewis School Pengam during their Pride of Pengam day.



**July 2022**

- [Free School Meals](#)
- [Youth Work Week](#)
- [Siarter Iaith Gold Award – Ysgol Penalltau](#)
- **Ukrainian Cultural Event**

On Saturday 23<sup>rd</sup> July the Council organised an event at Llancaiach Manor for our Ukrainian guests and hosts. It was an opportunity to bring everyone together and immerse everyone in a little history of the Manor House and its significance in the local area.



## August 2022

### ➤ Ukraine Independence Day

Today 24<sup>th</sup> August marks Ukraine's Independence Day, which commemorates the anniversary of the country's independence. Prior to 1991, Ukraine was a constituent republic of the Union of Soviet Socialist Republics (U.S.S.R.). On August 24, 1991, after a failed coup in Moscow, Ukraine declared its independence. About 90 percent of Ukrainians voted for their country's independence following this declaration, on December 1, 1991. #IndependenceDay2022



Wales is the first ever 'Nation of Sanctuary'. The Welsh Government and Members of the Senedd across political parties have expressed strong support to provide sanctuary in Wales for those fleeing Ukraine. As a local authority we are thankful for all the individual sponsors across our local authority for giving up their homes and supporting our Ukrainian arrivals. #IndependenceDay2022



There have been 8 sponsors in Blaenau Gwent that have joined this scheme and come forward as a sponsor with an extraordinary act of kindness. They have extended the hand of friendship to a stranger in their hour of need. Could you offer a place of safety for an individual or family? You will find more information at <https://gov.wales/homes-ukraine-guidance-sponsors-html#section-94903>



### ➤ [Pride Cymru](#)



## September 2022

### ➤ [County borough of sanctuary to asylum seekers](#)

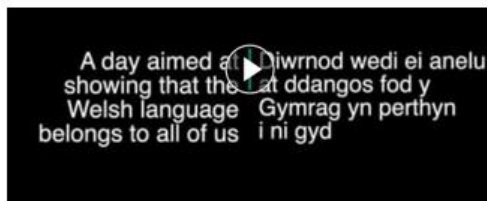
## October 2022

- [Cost of Living support for residents](#)
- [Disability 6 Nations Event](#)
- [Black History Month](#)

[Black History Month \(unisoningwent.org.uk\)](http://unisoningwent.org.uk)

- Diwrnod Shwmae

As part of Diwrnod Shwmae / Su'Mae this year, we attended a Welsh Language group in Cross Keys to raise awareness of the Welsh language in the wider community and also visited Ysgol Gyfun Cwm Rhymni. We used this as an opportunity to create a video for social media to show people across the county borough saying "Shwmae", and Llancaiach Fawr Manor also promoted Diwrnod Shwmae / Su'Mae with their visitors.



Caerphilly County Borough Council  
15 October 2022 at 09:05

### Shwmae Day 22 final

Happy Shwmae Su'mae Day!

A day aimed at showing that the Welsh language belongs to us all – fluent speakers, learners or those shy about their Welsh!

Try greeting someone with shwmae or su'mae today to celebrate the Welsh language!

Diwrnod Shwmae/Su'mae Hapus!

Diwrnod wedi ei anelu at ddangos fod y Gymraeg yn perthyn i ni gyd – siaradwyr rhugl, dysgwyr neu'r rhai sy'n saif am eu Gymraeg!

Ceiswch gyfarfwrch rhywun gyda 'shwmae' neu 'su'mae' heddiw i ddatthu'r Gymraeg!

Caerphilly County Borough Council  
14 October 2022 at 15:14



Llancaiach Fawr Manor 14 October 2022 at 09:45

Early celebrations for Shwmae Su'mae Day, 15th of October, 2022! If you want your photo taken pop along today or tomorrow!

Dathliadau cynnar ar gyfer Diwrnod Shwmae Su'mae, 15fed o Hydref, 2022! Os ydych chi eisiau tynnu eich llun galwch draw heddiw neu yfory!

## November 2022

- White Ribbon Day



caerphillycbc  
@CaerphillyCBC

Residents across Gwent are being asked to get involved and support White Ribbon Day on Friday 25 November.

White Ribbon Day is an annual event that marks the United Nation's International Day for the Elimination of Violence Against Women.

[bit.ly/3Oy9Irp](https://bit.ly/3Oy9Irp) [pic.twitter.com/ly12olwv4o](https://pic.twitter.com/ly12olwv4o)

25/11/2022, 10:45

## December 2022

### ➤ Welsh Language Rights Day

On 7 December we celebrated Mae Gen i Hawl (Welsh Language Rights Day). We used social media again to ensure residents are aware of their rights as Welsh speakers when accessing services.

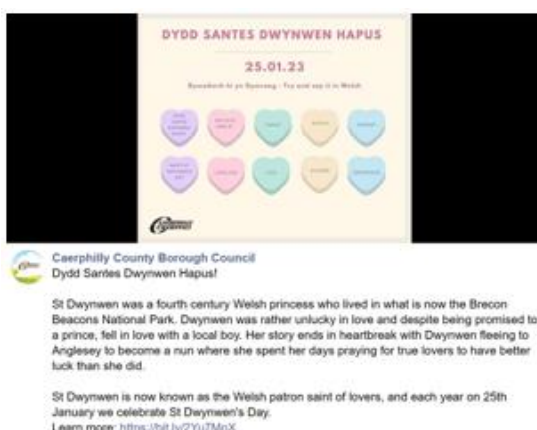


Internally we made reminded staff about the Welsh Language Standards and what is expected when communicating with members of the public. This included information on answering phones bilingually, ensuring automated bilingual out of office messages are correct, making sure general correspondence is bilingual, and ensuring that Welsh speakers wear lanyards with the Work Welsh logo on them.

## January 2023

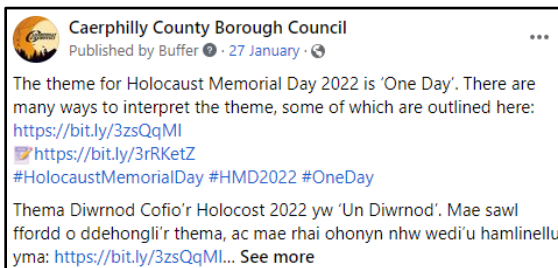
### ➤ [St Dwynwen's Day](#)

On 21 January, we put out social media posts explaining the story of Santes Dwynwen and encouraged members of the public to use Welsh language phrases.



Internally we made reminded staff about the Welsh Language Standards and what is expected when communicating with members of the public. This included information on answering phones bilingually, ensuring automated bilingual out of office messages are correct, making sure general correspondence is bilingual, and ensuring that Welsh speakers wear lanyards with the Work Welsh logo on them.

## ➤ [Holocaust Memorial Day](#)



## February 2023

### ➤ [LGBTQ+ History Month](#)

We kicked off LGBTQ+ History Month by making a very special announcement, with the Council holding its first ever Pride Caerffili event on Saturday 24 June 2023.

To mark LGBTQ+ History Month, staff were invited to attend the **Gwent LGBTQ+ Timeline** on 27 February 2023. The timeline was pulled together and organised by Aneurin Bevan University Health Board, the author and historian Norena Shopland, and Proud Councils colleagues.

Norena Shopland utilised her Welsh historic material collection on sexual orientations and gender identities to inform the timeline, as well as stories and information from those that contributed to the Hanes LHDT+ Cymru / LGBTQ+ Research Group Wales, a group established to encourage and promote research into Welsh LGBTQ+ history.

The event was an opportunity for people to help review the work to date and put forward suggestions for additional content.

## March 2023

### ➤ [The Council supporting people with learning disabilities](#)

### ➤ St David's Day

On 1<sup>st</sup> March 2023, we marked St. David's Day by launching our internal Clwb Clebran. A group formed to give staff who are Welsh speakers and staff learning Welsh the opportunity to come together to use their Welsh in the workplace. The day was also promoted via social media.



➤ International Women's Day

We ran a Menopause Webinar for staff to mark International Women's Day. The event was well-attended, with attendees being signposted for further advice, support and information on the subject.

<p>Sent: 08 March 2023 10:31          To: List: All Users &lt;List_AllUsers@CAERPHILLY.GOV.UK&gt;          Subject: International Women's Day</p>	
<p>Mae 8 Mawrth bob blwyddyn yn nodi Diwrnod Rhyngwladol i Menywod.</p> <p>Dathlwn y diwrnod hwn bob blwyddyn er mwyn gwerthfawrogi'r cyfraniadau enfawr a wneir gan fenywod yn ein cymdeithas.</p> <p>Eleni, hoffem gynnig y cyfle i bob aelod o staff (dynion a menywod) ymuno yn y seminar canlynol er mwyn deall mwy am un o'r bryndrau beunyddiol, anghofiedig a wynebwr gan fenywod.</p> <p>Mae'r seminar ar gyfer menywod a dynion, yn enwedig os ydych yn gweithio gyda menywod, yn rheolwr ar fenywod neu gydag aelod o'r teulu sy'n fenyw.</p> <p>Am ragor o wybodaeth, gwelwch y atodiadau gan Sarah Williams a fydd yn rhedeg y seminar neu cysylltwch â <a href="mailto:cydraddoldeb@caerphilly.gov.uk">cydraddoldeb@caerphilly.gov.uk</a></p> <p><b>20 Mawrth – Ymwybyddiaeth Menopos, seminar 1 awr</b></p> <p>Byddwch yn rhan o greu amgylchedd gweithle cynhwysol lle gall pobl siarad yn agored am y menopos. Wedi'i gyflwyno gydag ymagwedd sensitif a chadarnhaol, trwy lens gynhwysol. Sesiwn ragweithiol, rhyngweithiol a byw ar-lein.</p> <p>I sicrhau eich lle ar y sgwrs, llenwch y ffurflen ganlynol:  <a href="https://www.caerphilly.gov.uk/office/hyfforddiant-cydraddoldeb">Ffurflen Hyfforddiant Cydraddoldeb (office.com)</a></p>	<p>8 March every year marks International Women's Day.</p> <p>We celebrate this day every year in order to appreciate the huge contributions made by women in our society.</p> <p>This year, we'd like to offer all staff (men and women) the opportunity to join in the following seminar in order to understand more about one of the often forgotten, everyday struggles faced by women.</p> <p>The seminar is for women and men, especially if you work with women, manage women or have a woman in the family.</p> <p>For more information, please see the attachments from Sarah Williams who will be running the seminar or contact <a href="mailto:equalities@caerphilly.gov.uk">equalities@caerphilly.gov.uk</a></p> <p><b>20 March – Menopause Awareness, 1 hour seminar</b></p> <p>Be part of creating an inclusive workplace environment where people can talk about menopause openly. Delivered with a sensitive and positive approach, through an inclusive lens. A live-online proactive, interactive and session.</p> <p>To secure your place on the talk, please fill out the following form:  <a href="https://www.caerphilly.gov.uk/office/equalities-training-form">Equalities Training Form (office.com)</a></p>

To view the Council's other news stories please click on the link to search - [Caerphilly Council - News Centre](#)



## Case Studies

The following case studies are examples of key local authority services delivering and making a difference to people's lives and taking the time to support vulnerable people and families to be independent, and to seek training and employment opportunities, as well as housing and benefits advice.

### Case Study 1: Communities for Work Plus (CfW+)

CfW+ acts as the employability support function within Caerphilly CBC's employability team for those who are ready or available for work, or who have been assessed as near work readiness. Mentors will support all unemployed customers with barriers to employment - Economically Inactive, Short Term Unemployed, Long Term Unemployed, and 16-24 year old NEET's, across all Caerphilly postcodes.

Anybody requiring employability support, including CV writing, application and interview skills, support with barriers such as transport, mild to moderate poor mental health, training needs, work limiting health conditions/disabilities, history of offending, homelessness, challenges owing to age (e.g. 16-24 or 50+), caring responsibilities or any other barriers will be offered intensive 1-2-1 support via a CfW+ Mentor.

SPF support is tailored for those with the most complex barriers to engagement with a focus on pre-employability support for unemployed and economically inactive residents age 16+ for those furthest away from the labour market with multiple/complex barriers to work - support via mentors will focus on 1-2-1 keyworker support, developing mental and physical wellbeing, accessing the benefits system, increasing basic and life skills, building personal and financial resilience, confidence and accessing relevant training courses. SPF provision complements CfW+.

SPF mentors also provide individual support those in employment, who wish to increase contractual hours, gain secure work, re-train or change career direction, providing support to those on low incomes or who are under-employed but not limited to this. Work related qualifications, interview skills, and job search will be the focus.

Under the SPF People and Skills pillar, support is also provided to focus on: Work related qualifications – focus on addressing skills gaps for employed and unemployed - with bespoke training pathways and recruitment needs linked to skills gaps. Pathways will be delivered both locally and jointly commissioned regionally.

Green skills and Green Industries bespoke courses - addressing skills gaps and recruitment needs in relation to 'green' skills and green industries to develop a skilled workforce that can work towards the Governments Net Zero and wider environmental ambitions - supporting unemployed and employed by jointly commissioning and locally procuring bespoke courses.

Retraining & upskilling support for those in high carbon sectors - Upskilling and reskilling the current workforce across sectors affected by the Green agenda is a priority, e.g., sectors such as Housing, Construction, and Transport. Work will be undertaken with local employers, including Caerphilly Council to identify skills gaps

and a bespoke programme of learning to enable an employee to upskill / retrain as appropriate to their role.

This work supports:

**Equality Objective 2: Education, Skills and Employment – Improve education opportunities for all.**

## **Case Study 2: Policy on Awarding Grants**

The Council is required to meet all of the 171 standards included in the final Compliance Notice issued by the Welsh Language Commissioner under the Welsh Language (Wales) Measure 2011.

The Welsh Language Commissioner wrote to all Local Authorities in Wales on the 19<sup>th</sup> October 2021 to provide "guidance to organisation on the correct interpretation of the standard (94)" and requiring the Council to "confirm that we will produce a policy and provide a date for publishing".

The Welsh Language Commissioner wrote to the council again in April 2022 stating that as a result of evidence gathering, they were requesting further actions be made to ensure full compliance with specific Standards. One of these actions relates to Standard 94, which is to produce and publish a policy on awarding grants.

The Welsh Language Commissioner's advice document outlines the expectations in relation to the implementation of policy making standard 94 and highlights:

- formally adopting via a management board decision
- having arrangement for someone with the relevant Welsh language expertise and experience as part of the process
- that the amount of money is irrelevant – the standard covers small and large grants

The Equalities and Welsh Language Team worked in partnership to develop a Policy on Awarding Grants at Caerphilly Council to assist services to comply with the relevant standards, which will ensure officers take the following into account –

- How the grant could impact opportunities for people to use and promote the Welsh Language (Positive or Negative) and if in any way it treats the Welsh Language less favourably than the English Language
- How positive impacts could be increased, or negative impacts be decreased

The Welsh Language (Wales) Measure 2011 established a legal framework to impose a duty on local authorities to comply with Standards of conduct in relation to the Welsh Language. In particular, this means that Local Authorities cannot treat the Welsh language less favourably than the English language, and must promote and facilitate the use of the Welsh language therefore making it easier for people to use it in their daily life.

The Welsh Language (Wales) Measure 2011's aim is not to treat Welsh and English on the basis of equality but rather to have positive effects on the Welsh language. As such, the Measure allows bodies to exercise this aim independently of any effect on the English language.

The Standards affect all areas of the Council's work and the Welsh Language Commissioner may apply a selection of sanctions including financial sanctions for each proven breach of a standard.

With regards to policy making standards, the Welsh Language Commissioner has found that many organisation under the Welsh Language Standards No.1 Regulations were failing to comply with Standard 94.

Rhondda Cynon Taf Council led on the development of this policy approach across our region, as requested by their Chief Executive, in order to ensure a consistent approach from all organisations subject to the Welsh Language Standards (No.1) Regulations. The following organisations have agreed to implement the policy:

- Rhondda Cynon Taf CBC
- Torfaen CBC
- Newport CBC
- Merthyr CBC
- Monmouthshire CBC
- Cardiff Council
- Welsh Government

The following organisations are also hoping to adopt the policy –

- Powys CBC
- Blaenau Gwent CBC
- Vale of Glamorgan CBC
- Denbighshire CBC

The [Policy on Awarding Grants](#) was approved by Corporate Management Team in June 2022, which was shared with officers who administer grants, and published on the Corporate Policy Unit Portal and on the Council's website.

This work support:

**Equality Objective 5: Welsh Language – To ensure the Welsh speaking public can access services that comply with the statutory requirements.**

## Employment Monitoring Data

The following information is high-level data of what the *iTrent* payroll system holds as at 31<sup>st</sup> March 2023 regarding the Caerphilly CBC workforce profile, in terms of protected characteristics and language ability of staff.

- Gender, Ethnicity and Disability data is currently shown by Directorate.
- Religion or Belief and Sexual Orientation data is currently shown by corporate total only. Data has improved during the last financial year.
- Language Ability is available by Service Area but the data is provided here as Corporate totals for information.
- Other information has not been presented as the categories are currently showing zero records.

<b>Gender by Directorate</b>	<b>Male</b>	<b>Female</b>	<b>Undisclosed</b>
Economy & Environment	1023	1125	1
Education & Corporate Services	885	3900	0
Social Services & Housing	475	1435	0
<b>Authority Total</b>	<b>2239</b>	<b>6108</b>	<b>1</b>

<b>Ethnicity by Directorate</b>	<b>White</b>	<b>BME</b>	<b>Undisclosed</b>
Economy & Environment	1866	13	193
Education & Corporate Services	3800	40	917
Social Services & Housing	1793	27	89
<b>Authority Total</b>	<b>7088</b>	<b>74</b>	<b>1178</b>

<b>Disability by Directorate</b>	<b>Disabled</b>	<b>No</b>	<b>Undisclosed</b>	<b>Unwilling to declare</b>
Economy & Environment	62	1815	198	0
Education & Corporate Services	68	3756	937	0
Social Services & Housing	61	1747	102	0
<b>Authority Total</b>	<b>179</b>	<b>6960</b>	<b>1209</b>	<b>0</b>

<b>Sexual Orientation (totals)</b>	<b>Numbers</b>
Bisexual	34
Gay	35
Heterosexual	3423
Lesbian	32
Other	31
Undisclosed	4883
Unwilling to Declare	97
<b>Authority Total</b>	<b>8535</b>

<b>Religion or Belief (totals)</b>	<b>Numbers</b>
Buddhist	7
Christian (All Denominations)	1264
Hindu	4
Jewish	1
Muslim	2
Sikh	3
Humanist	9
No Religion	2068
Undisclosed	5076
Unwilling to Declare	56
Other	45
<b>Authority Total</b>	<b>8535</b>

<b>Nationality</b>	<b>Numbers</b>
British (Not Channel Islands or IOM)	1203
English	97
Northern Irish	3
Irish	10
Welsh	2507
Scottish	8
Cornish	2
Other	44
Undisclosed	4652
Unwilling to Declare	9
<b>Authority Total</b>	<b>8535</b>

<b>Language Ability (Other than English)</b>	<b>Numbers</b>
Braille	1
BSL (British Sign Language)	38
Dutch	1
French	27
German	9
Hebrew	1
Hindi	2
Italian	1
Makaton Sign Language	1
Malayalam	2
Spanish	11
Tamil	1
Turkish	1
Welsh	2100

\*(No staff total is recorded as some staff speak more than two languages)

**Welsh Language Skills\*\***

Total Staff*	8535
Welsh Speakers*	2100
Percentage of Workforce	24.60%

\*The Total Staff and Welsh Speakers do not equal the overall workforce total due to some members of staff having more than one post within the organisation and those posts are within different service areas.

\*\*These totals includes teachers and school-based employees.

## Strategic Equality Plan 2020-2024

The Strategic Equality Plan was developed to primarily demonstrate the Council's commitment to meeting the Equality Act 2010 (Statutory Duties) (Wales) Regulations 2011. It highlights links to legislation and regulations covering the Welsh Language Standards and Human Rights issues and how it supports 4 of the 7 aims of Welsh Government's *Well-being of Future Generations (Wales) Act 2015*; *A Healthier Wales*, *A More Equal Wales*, *A Wales of Cohesive Communities* and *A Wales of Vibrant Culture and Thriving Welsh Language*. It also outlines how the council will meet its responsibilities under the Public Sector Equality Duty, to advance equality and inclusion for all protected groups.

Our new plan was due to be approved at the end of the 2019-2020 financial year, however the pandemic and the immediate response required by the Council meant that it was not formally agreed until October 2020. We chose seven Strategic Equality Objectives, and, despite the challenges posed by the pandemic, we have been able to show good progress against them. The following summary includes information that we gather to meet the reporting requirements of our 4-year plan. Our chosen objectives are:

**Equality Objective 1** – Service Planning and Delivery – Understand and remove the barriers people face when accessing services

**Equality Objective 2** – Education, Skills and Employment – Improve education opportunities for all

**Equality Objective 3** – Community Cohesion – Promote and facilitate inclusive and cohesive communities

**Equality Objective 4** – Inclusive Engagement and Participation – Engage with citizens to encourage participation, to have their voices heard when planning service delivery

**Equality Objective 5** – Welsh Language – To ensure the Welsh speaking public can access services that comply with the statutory requirements

**Equality Objective 6** – Inclusive, Diverse and Equal Workforce – Create a workforce which reflects and respects the diversity of the communities within the county borough

**Equality Objective 7** – Reducing the Gender Pay Gap

We measure our progress against these objectives through an action plan and the following sections give a snapshot of the activity we have progressed during this reporting year.

## **Progress against the Objectives and Actions:**

### **Equality Objective 1 - Service Planning and Delivery - Understand and remove the barriers people face when accessing services**

This objective focuses on the provision of accessible and inclusive services to the citizens of the county borough. We will achieve this by continuing our engagement with service users to identify and eliminate barriers to services.

Barriers experienced by groups and individuals may include, accessing information in appropriate formats to suit their needs, mental health difficulties, transport, unemployment or accessibility to technology. Service areas should implement plans and strategies collaboratively to successfully address and remove identified barriers.

Education, health and mental health services, housing, social services and transport are areas which we wish to improve upon.

Empowering groups with protected characteristics to be able to access the services they need is a key focus for the Council.

#### **Action 1**

Deliver on the principles in the Customer and Digital Strategy - connect technology and knowledge to deliver excellent customer experience and opportunities

#### **Progress**

Capita Pay360 is currently being migrated to SaaS, which will provide the foundation for delivering payment services in more ways, providing improved customer experience.

RPA and My Council Services have continued to be used across the Council reducing repetitive tasks and improving customer experience.

We continue to improve our security stance in an ever changing environment where threats continue to be developed and cyber-attacks are increasing. Security awareness training is delivered to all computer users annually and this is supplemented with attack simulations throughout the year, which feeds into future training developments.

Digital services in school have been developed in line with WG standards. A dedicated team looks after the end user computing in schools while the infrastructure is managed through existing teams. Continued review and development of these technologies is in place, linking with current strategies and work programmes from WG.

Procurement services have lead on the all Wales EdTech programme which provides a route to market for school technologies.



The Council continue to be a lead on the all Wales learner experience project, collaborating with all public sector bodies across Wales.

	<b>Followers</b>	<b>Posts</b>	<b>Reach</b>
<b>Facebook</b>	35,268	3,101 (bilingual)	605,485
<b>Twitter</b>	21.8K	1,886 (bilingual) *likely to be an inaccurate number due to loss of data	1.46m
<b>Instagram</b>	4,130	20 (bilingual)	14,380
<b>LinkedIn</b>	9,330	3,101 (bilingual)	6,057

Another method the Council uses to convey messages is a free subscription service for Gov Delivery Email Bulletins. By registering for this service, residents receive key Council information direct to their email address, with hyperlinks included to take the reader to further information.

Gov Delivery, email bulletin data for the period 1 November 2022 to 31 October 2023 are as follows:

### **Welsh**

- 209 email bulletins sent
- Subscribers have increased from 766 to 826 (+7.86%)
- Engagement rate (those who opened and clicked on a link in a bulletin) 66.60%
- Impressions 8140 (clicks on links) (+16% increase on previous year)
- 1643 subscriptions +172 +10.46%

### **English**

- 259 email bulletins sent
- Subscribers have increased from 39,734 to 44,122 (+5.75%)
- Engagement rate (those who opened and clicked on a link in a bulletin) 69.30%
- Impressions 1.24million (clicks on links)
- 186,342 subscriptions +11,139 +6.36%

### **Action 2**

Ensure our staff have the necessary skills to deliver digital services – *linked to Staffing, Skills and Development Theme*

### **Progress**

The Information, Insight & Intelligence Corporate Review concluded earlier this year – some of the review work streams were completed, others were returned to the relevant service area for completion as part of their own forward work programmes, and some have helped inform the ongoing Mobilising Team Caerphilly portfolio. A new DigiHub was developed on the intranet as a resource to support staff, as well as delivering a programme of IT training sessions.

Training and further development is offered via the MY TIME process to enhance skills and development.

### **Action 3**

Explore and consider adopting the Communication Access Symbol to ensure information is provided using different formats and languages including BSL

#### **Progress**

The Council has a Translation and Interpretation Framework in place and service areas request translation or interpretation services via the approved providers on the framework. The framework will be out to tender in spring 2024.

The Housing strategy is available in an Easy Read format.

The new occupation contracts have been forwarded to all Caerphilly Homes contract holders, including in several different languages, audio and BSL in line with identified language preferences.

### **Action 4**

Upskill citizens to enable greater use of digital technology to address digital exclusion

#### **Progress**

The Adult and Community Learning (ACL) service continues to offer a wide range of digital skills classes to residents across the borough. We are also able to loan out iPads and laptops to learners enrolled on ACL courses who need this facility. The new (£5.5 Million) Multiply project will offer a wide range of “numeracy” based learning opportunities to Caerphilly county borough residents, such as shopping online and using online comparison sites.

Libraries offer free PC or laptop access to all residents who wish to access digital technology for education, learning support or for recreational purposes.

The Community Education Team and other partner organisations use libraries to host training sessions and events to address digital exclusion.

Libraries regularly survey customers to gain information on their needs and requirements – this is completed by using the biannual Customer Satisfaction Survey.

The Tenant and Community Involvement have provided tablets on loan to some of our involved tenants to help them become more digitally involve; tablets still in use but we haven't expanded the numbers.

Willmott Dixon have provided 20 tablets in total to Caerphilly Cares as part of their Social Value obligations. The tablets have been distributed to local charities who are addressing social isolation.

### **Action 5**

Identify service needs of specific user groups; what barriers prevent access; and what actions are required to remove those barriers – use complaints and compliments

## Progress

The Tenant and Community Involvement Team have been involved in a project with the RNIB to train staff to be aware of tenants with sight loss issues and to be able to offer assistance; it's called Vision. The Vision Friends training has been rolled out to all sheltered housing and floating support front line staff.

We have undertaken a consultation exercise with all Caerphilly Homes tenants on the proposed closure of the decentralised housing offices as part of a transition to providing more community based services and home visits.

As part of the corporate 'Mobilising Team Caerphilly' work, the customer experience is being explored and will include work to identify the needs of specific user groups. The work will seek to understand the customer experience in detail, user needs and barriers so that the experience can be improved and be more responsive to all user needs.

People Services will continue to review complaints and compliments and look for learning opportunities relating to barriers to our service. HR and Communications will support other service areas as appropriate.

The Corporate complaints digital database developed is operational. This new system will streamline our lines of communication and provide prompts where timeframes for responding need to be met or extended. The system will also improve interrogation of the data records, which can be accessed in a more efficient manner than the previous manual interrogation, to produce the information we need to learn from complaints and improve our services as an authority.

An additional column has been included to our complaints database to identify which complaints and compliments include equalities or Welsh language issues.

Equalities and Welsh language complaints data forms part of the biannual reporting to the Governance and Audit Committee and Cabinet as part of the Corporate Complaints process, and the Senior Policy Officer (Equalities and Welsh Language) sits on the corporate *Learning from Complaints Group* that meets quarterly to discuss specific and cross-cutting complaints.

Corporate complaints are those that are due to failure of process or failure to operate Council policy correctly. These are complaints that could ultimately be forwarded to the Public Services Ombudsman or Welsh Language Commissioner for example. Code of conduct issues around staff behaviour or attitude are dealt with via internal HR processes.

There are separate complaints processes for dealing with social services complaints and school-based complaints. The Social Services Complaints Procedure Wales Regulations 2014 outlines the procedure for handling complaints from persons receiving a service from social services. School-based complaints are dealt with by the School and Governing Body.

During 2022-2023, we received 10 equalities related complaints and they are broken down as follows:

<b>Category</b>	<b>Detail</b>
Equalities	Agreement via Bin Assist that recycling bin should be returned on to pavement due to disability but the crew forgot to do so again.
Equalities	Waste collection crew not returning bins to the pavement and instead leaving them on the road and blocking the driveway to a property where a disabled person lives
Equalities	Chasing up SMI for Huntington's Disease rebate. Spoken to 3 receptionists and still no progress. People with Huntington's have no filters and swear. Receptionist saying stop swearing and refused to pass the call to the manager. Staff need Mental Health Training
Equalities	<b>a)</b> Resurfacing disturbance, signage not clear and advance warning not known - Visual Impairment <b>b)</b> Further correspondence received not as requested
Equalities	School Transport issues for disabled student
Equalities	Wrongly informed about Resident's Parking Scheme and felt ignored due to Polish accent
Equalities	Issues with Council Tax, Housing benefit, Libraries, Housing - in relation to rented accommodation, benefits and discounts in receipt and discounts outstanding
Equalities	Complaint regarding a number of issues to do with his housing and the way he has been treated. Lack of reasonable adjustments, light bulbs, sewage etc.
Equalities	Complaint regarding EHO dealing with noise complaint and responses have had a detrimental impact on the complainants mental health

Also recorded were 4 equalities and Welsh language service requests, and they are broken down as follows:

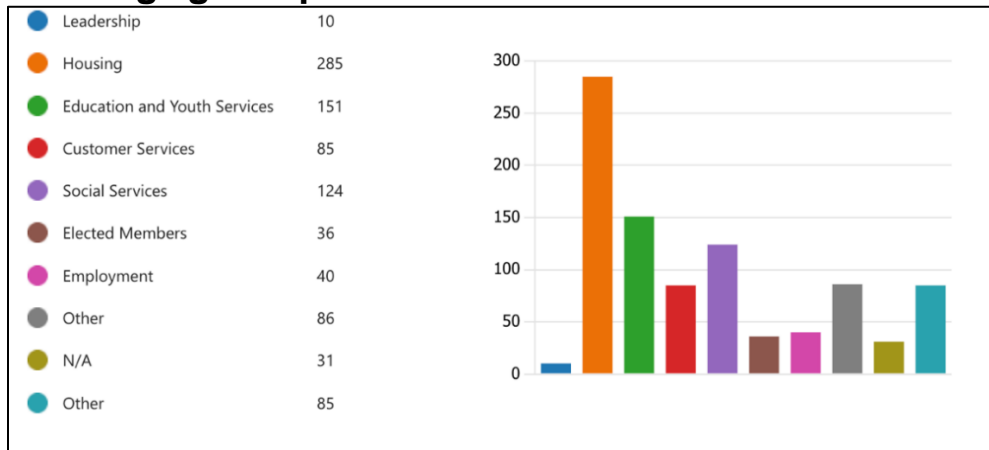
<b>Category</b>	<b>Detail</b>
Welsh	Winter Fuel Support Scheme - On the rejection page, after the Welsh, that the words 'plug in' are there each time, but this does not happen in the English
Welsh	Green sacks page on website in English. Problems ordering green sacks on a mobile device.
Equalities	Black Flag being flown from property stating: WOMAN Noun Adult Human Female - complainant deems this to be transphobic.
Equalities	Young white males portrayed in Community Safety poster as being involved in violent disorder

The Armed Forces Covenant is now in Law for Housing, Education and Health. This means that organisations must pay 'Due Regard' in these policies areas. To upskill staff on the responsibilities under the legislation Armed Forces Covenant training continued to be delivered via Microsoft Teams. The training provides an overview of the unique challenges of Service life and how staff can help support the Armed Forces

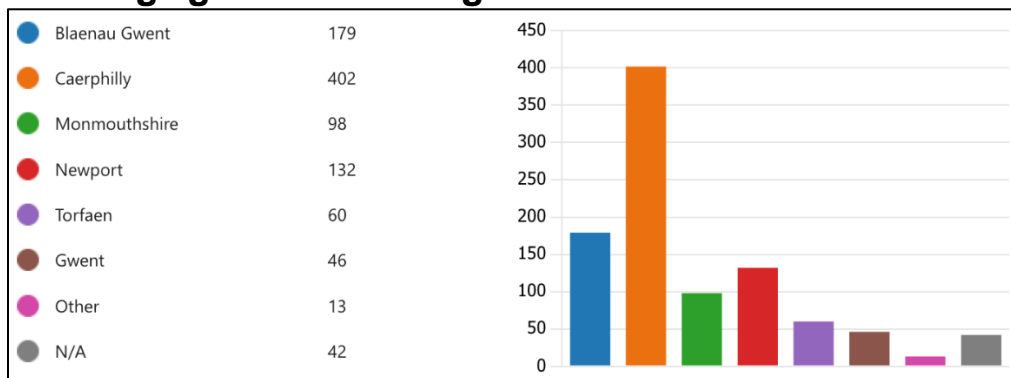
Community. It will help staff understand and apply the principles of the Covenant at a local level. It includes sources of further information and support, including:

- What the Covenant is?
- Who the Armed Forces Community are and what challenges they face?
- How the Covenant is applied in real-life scenarios?
- Armed Forces Covenant legislation – What is Due Regard?
- Sources of Support

### Training figures per service area



### Training figures from a regional level



### Action 6

Ensure the Council’s website and intranet is accessible so that people with disabilities can still engage

### Progress

Intranet is currently being replaced and new version is in user acceptance testing. The site will be fully accessible to all staff, including those who are not office-based, with the site being accessible from personal devices. The Council’s Communications Team, has full responsibility for this product going forward. Accessibility standards compliance was a key requirement of the specification.

A project to replace the Council's website is underway and the specification is being finalised.

Our web team have undertaken work to improve the accessibility of the Council's website. In the last report the Council's accessibility score was 91% accessible. At time of reporting the Council's website is now has an overall accessibility score of 96%. We are acutely aware that there are still aspects that still require work. Our primary focus is on removing the large number of non-accessible PDF documents on the site, with the aim of replacing them with HTML format text. To support this, we have developed a tool to allow staff to create accessible, HTML 'web documents' using Microsoft Word.

We are working to achieve full compliance with Web Content Accessibility Guidelines (WCAG) 2.1 AA. Sourcing testing software to assist with this process. Preparation for the redevelopment of the Council's website is underway with compliance with WCAG 2.1 AA a key driver. To further facilitate full compliance, we are currently looking at a replacement website.

The Council has an internal Accessibility Working Group of officers from across different service areas who meet, discuss and share good practice of accessibility issues. The group has developed intranet pages for members of staff to refer to for further guidance and training information to enable them to develop literature in an accessible manner.

Over the last 12 months, we have trained a further 11 members of staff, some of them acting as 'gatekeepers' within the organisation, to check documents are accessible and to prevent inaccessible reports going through the system. We have delivered numerous presentations of the importance of accessibility at a range of sessions including Management Network, and we are currently piloting and considering how to roll out the new tool developed in-house to convert text into HTML for the Council's web pages.

Each member of the group is an Accessibility Champion and is available to help other members of their departments to deal with queries and promote learning. There are plans in the pipeline around induction and report writing for new employees starting work within the organisation.

Participation Officers have been working with corporate staff to update our web pages. This will be improved as part of the Mobilising Team Caerphilly work to improve the customer experience across all service areas within Caerphilly Homes.

Our Accessibility Statement is updated annually, you can read our full statement here: <https://www.caerphilly.gov.uk/my-council/data-protection-and-freedom-of-information/accessibility-statement?lang=en-GB>

## **Action 7**

Improve the collection and recording of equalities monitoring information of our citizens across council services

## Progress

The equalities monitoring questions asked have been updated by members of Proud Councils and are now used for collecting relevant monitoring questions as part of consultation exercises and recruitment. These questions are consistent across Gwent.

In Housing this is achieved via the Common Housing Register (CHR) and Private Sector Housing Equality monitoring.

In autumn 2022, as part of preparation for Renting Homes Act, all tenants were sent a form to update general contact details, tenancy details and language preferences, and also to let us know of any support needs. More than 5,000 tenant records were updated.

## Action 8

Collect equalities monitoring information for compliments and complaints

## Progress

Complaints officers are aware of the requirement to complete the additional data on our complaints database to identify which complaints/compliments include equalities or Welsh language issues.

The table below shows a count and list of findings resulting from the Housing complaints in this reporting period that relate to Equalities or Welsh language.

<b>Characteristic Strand</b>	<b>Count - Stage 1, Stage 2 &amp; Escalated 1 to 2</b>
Age	0
Disability	4
Gender Reassignment	0
Marriage and Civil Partnership	0
Pregnancy and Maternity	0
Race	0
Religion/Belief or Non-belief	0
Sex	1
Sexual Orientation	0
Welsh Language	0

Extracts from cases linked to the Disability characteristic:

- Following shower being fitted the boiler was adjusted to ensure hot water was coming from shower. This has caused water from the hot water tap to be deemed too hot for her daughter concerned daughter will scald herself. This issue was considered at both stage 1 and Stage 2 and was not upheld.
- Contract Holder advised they were unhappy with the banding they were placed on the Common Allocations Register due to their medical conditions and feel they should have a priority banding. This complaint was considered at both Stage 1 and Stage 2 and was found to be upheld with lessons learnt.

- Resident raised issues of sexism within Housing Solutions Team as there would be more options available to him if were female. The resident later decided to withdraw this complaint.

### **Action 9**

Survey the council's building stock (and schools) in relation to accessibility using the Local Access Group

### **Progress**

The Council owns and manages 10,700. We assess the level of accessibility of each home before it is let and best match properties with those that require the assessed level of accessibility. We also carry out adaptations to those home to improve levels of accessibility where our tenants require them.

### **Action 10**

Survey polling stations in relation to accessibility using the Local Access Group

### **Progress**

Polling station inspectors surveyed all polling stations during the Local Council Elections in 2022. 88% were accessible and 12% were not. It is important to note that many polling stations are based within buildings not owned by the Council.

All polling stations will be reviewed as part of a statutory polling station review from October 2023 and a decision made on future use.



## **Equality Objective 2 - Education, Skills and Employment - Improve education opportunities for all**

The primary aim of this objective is to ensure that our communities are well equipped to secure sustainable and well-paid employment as a means of preventing poverty. Through ensuring our citizens are ready to enter the working environment we will prevent long-term problems associated with low skills and un-employability.

*'Improve Education opportunities for all'* as detailed in the Council's Corporate Plan, will be delivered using outcomes identified within the Shared Ambitions 2019-2022 Strategy. This strategy outlines the Council's commitment to work with schools and the Education Achievement Services (EAS) to improve educational attainment and achievement.

Increasing the number of citizens accessing education, training and employment will positively contribute to creating cohesive and resilient communities that will thrive. The skills agenda is fundamental to the economic development and economic prosperity of the nation, Cardiff Capital Region and Caerphilly County Borough.

Key to this will be focussing our work on reducing the number of young people who are not in employment, education and training, eliminating the economic inactivity gap; identify the skills gaps and shortages in priority sectors, increase the number and quality of apprenticeships and improve people's perception of apprenticeships as a route into well-paid employment.

### **Action 1**

Improve the skills of citizens by providing opportunities to gain qualifications and support to obtain employment

### **Progress**

The Adult and Community Learning (ACL) service continues to offer a wide range of ACL classes and clubs to residents across the borough. The service also works closely with Shared Prosperity Fund projects, in particular People and Skills, to offer a range of learning opportunities to gain employment.

The new (£5.5 Million) Multiply project will offer a wide range of "numeracy" based learning opportunities to Caerphilly county borough residents, including Multiply Your Way to Employment and job specific numeracy courses.

Libraries offer free PC or laptop access to all residents who wish to access digital technology for education, learning support or for recreational purposes. All libraries are DDA friendly.

Our library bookstock is relevant, modern and educational.

The Community Education Team and other partner organisations use libraries to host training sessions and events to address digital exclusion.

The Cwm a Mynydd Rural Development Programme Team worked with Gelligaer Young Farmers Club to host and deliver a training day in all-terrain vehicle use, enabling young

farmers to play a more active role in agricultural production on farm and support their transferable skills.

The Rent Section work in partnership with Caerphilly Cares and our employment team, we refer tenants are work ready or require training opportunities.

The team accepted refers and carried out “what if” and better of calculations which highlighted the impacts on benefits over a series of scenarios e.g. 10 hours worked, 20 hours 30 hours.

Caerphilly Homes are in the process of creating a Construction related employment programme. Together with Willmott Dixon this programme will provide opportunities for citizens to obtain new qualifications and employment opportunities. It will also include a specific work stream for ex-military personnel who are currently on the Council’s housing register and seeking work.

Older Persons Housing also operate a tablet loan service and where possible we support Contract Holders with IT queries; we have one Senior Housing Officer who is RNIB Vision trained too and she has contributed to joint training sessions with another officer to raise staff awareness. We also refer to different support agencies and regularly promote and report on ‘good news stories’.

The Council’s Employability projects provided all participants with the opportunity to gain work related qualifications and appropriate courses in line with their chosen employment route They also provided the opportunity for participants to improve their basic skills via the Adult Community Learning team.

Fair work principles are embedded in our employability support projects which seek to match people with protected characteristics, carers and adults with responsibility for children with opportunities and working hours that suit them.

See Equality Objective 1: Action 4 for work undertaken with Armed Forces Veterans to upskill to enable access to goods and services.

Caerphilly Council’s Employability team has worked with the Armed Forces Liaison Officer to further support the Armed Forces Community. The team will support the applicant through the application under the guaranteed interview scheme and will arrange work experience where appropriate. The ‘Launch into Local authority scheme’ will ensure that the Armed Forces Community is not disadvantaged when applying for vacancies due to their inexperience.

## **Action 2**

Develop support for Adult Community Education to deliver digital literacy courses that will support local employability programmes

## **Progress**

The Adult and Community Learning (ACL) service continues to offer a wide range of free Essential Skills digital skills classes as well as ICDL to residents across the borough. We are also able to loan out iPads and laptops to learners enrolled on ACL courses who need this facility.

We actively encourage employers on the Council's tenders to employ local residents.

For Libraries – see response under Equality Objective 2 Action 1

### **Action 3**

Aim to reduce the impact of poverty by supporting citizens into improved employment opportunities and conditions

### **Progress**

The CCBC Employability projects support participants to improve their employability skills, confidence, and motivation, and to manage their expectations in relation to finding sustainable employment. The projects also assist participants to progress in employment by increasing their work related skills and help those who are underemployed to find work more suited to the skills and experience, or to increase hours or levels of responsibility.

Participants on the CCBC Employability Programmes will be invited to attend group information sessions held in partnership with partner organisations such as the DWP to apply for jobs in a variety of sectors – for example Care, Hospitality. Participants will meet employers and then be supported to gain qualifications and the skills along with interviews to fill the gaps in specific sectors.

Participants will be supported by the team of mentors to reach their goals and reduce barriers to gain qualifications that make them more employable to apply for jobs in their chosen career pathways.

All CCBC Employment programmes were advertised in different formats for participants to access information so they can self-refer or be referred by a third party for support to upskill or gain sustainable employment.

The suite of employment support programmes available seek to support and empower individual participants to achieve fair work; or in the case of Working Skills for Adults (WSfA) and Nurture, Equip and Thrive (NET), to upskill and improve the employment opportunities for those that are already in work. In particular, the NET programme aims to increase the ownership of generic, transferable skills across the workforce through community-based provision, helping to improve the opportunities for low skilled workers to sustain employment and increase their earning potential.

NET outcomes within CCBC vary from finding new jobs for individuals, either increasing hours or pay, or both; in addition to contractual improvements such as moving to a more stable contract. From April 2022- January 2023, 47 participants supported by the NET project (towards achieving fair work) of which 50% improved their labour market situation either by increasing their hours/and/or wage in a new or current role or by finding an additional role to supplement their existing employment hours.

In addition to NET, the Working Skills for Adults (WSfA) project provides support in terms of upskilling opportunities for participants across the Borough who are in work and have either no qualifications or low-level qualifications, as a route to progression (including progression towards fair work). For the period April 2022 – March 2023, WSfA support was provided to 44 participants of whom 38 gained qualifications.

Communities for Work (CfW), Communities for Work Plus (CfW+), Bridges into Work (BiW) and Inspire 2 Work (I2W) programmes also supported *unemployed* individuals to secure work, through the provision of intensive mentoring to address barriers, source relevant training and improve employability skills. Whilst the types of work that individuals may secure is varied and wide-ranging, the aim of employment mentors will always be to support participants to access employment that is sustainable and fair – and this will be done at the point of job searching and application. The provision of ongoing in-work support for a period after commencing work, supports with any issues that may arise in the first weeks, which may include issues related to fair work (such as health and safety concerns, salary or working hour negotiations, accessibility etc.). Alternatively participants may be also be referred to NET project.

Across the Communities for Work Plus (CfW+) programmes during the 2022/23 we supported 198 residents into employment.

There were positive outcomes for the 16-24 age group with young people being supported into employment. Delivery of Priority 3 which focused on (16–24-year-olds) within the ESF funded Communities for Work programme ceased in October 2021 owing to exceeding programme profiles but continued its' support as part of Welsh Government funded, Communities for Work Plus programme via YPG funding (Young Person's Guarantee). Skilled Youth Mentors were transferred from C4W to C4W+ to continue to provide support to young people aged 16–30-year-olds. At the end of 2023 this funding continued as part of the overall C4W+ WG funding offer.

Our employment programmes continue to provide excellent support for those with disabilities and work limiting health conditions. In particular, the CfW+ programme was able to further increase the proportion of customers with a disability or work limiting health condition that were supported into employment, with 23% (46 people) of job entries relating to participants with either a disability or work limiting health condition.

Support for customers with disabilities and work limiting health conditions – the Caerphilly Employment programmes have continued to provide support for customers with disabilities and work limiting health conditions for both unemployed and underemployed residents. The NET Project supported 16 participants with work limiting health conditions of whom 9 improved their labour market situation.

The Council agreed to fund the Welsh Government Free School Meals (FSM) holiday payments for the school Summer holidays, due to Welsh Government withdrawing the grant funding at short notice to families eligible for FSM. The service also undertook a new payment system of the School Essential grant for the first time this year, which enabled the authority to reach far more families in need.

For Armed Forces Covenant - see response under Equality Objective 2 Action 1.

For Libraries – see response under Equality Objective 2 Action 1.

For Housing – see response in Equality Objective 2 Action 1.

## **Action 4**

Meet the targets set within the local employability programmes by upskilling and supporting citizens into well-paid work

### **Progress**

With the cessation of the European Social Fund (ESF) funding and the Communities for Work (CfW) provision in March 2023 we have undergone several changes locally; a new management structure, has seen the merger of the Council's two Employment programmes from different service areas (due to the cessation of ESF, CfW provision and ESF Bridges into Work / Inspire 2 Work and Working Skills for Adults and Nurture, Equip, Thrive under the Education Directorate) and the introduction of the UK Government Shared Prosperity Funds (SPF) People and Skills Pillar funding to replace the ESF provision. This has been a long awaited move towards a 'single employability programme' offer in Caerphilly with no postcode restrictions or difficult eligibility issues, with the team able to support residents with all aspects of employability for both unemployed and employed 'in-work' support.

For the period up to March 2023 all of the above projects continued working well towards their targets towards resuming our preferred service delivery format of face-to-face support.

The Council's Employment Managers continued to work across the teams to ensure no duplication across all programmes in Caerphilly with other funded Employability Programmes. Regular meetings continue to be held with the Managers and Partnership Manager from the Department for Work and Pensions (DWP) to support participants to the right programme, to ensure that they were eligible for the right support and supported into paid work.

Employment Managers have continued to attend the Regional Skills Partnership meetings to work in partnership with other Local Authorities to address needs and paid opportunities across the Cardiff Capital Region.

As a whole, and historically, the employment programmes have found it difficult to engage with economically inactive participants and long term unemployed aged 25+,

However, Caerphilly Council's CELT Pilot Project was CRF funded and was considered a precursor to the SPF was delivered from March 2022 to December 31<sup>st</sup> 2022. Delivered by the ESF team - support focused on engaging economically inactive participants with the aim of referring them to the employability projects and Community Educations classes, or any other appropriate services as employability projects have often found it difficult to locate/engage with economically inactive residents. This was an opportunity to use a variety of engagement methods and utilise/ create links with partners to create a more sustainable employability journey. CELT successfully engaged with 86 economically inactive participants across the Borough from March 2022. This was over the original target of 75.

Support for our NEET young people (aged 16-24) across the employment teams has easily met our profiled targets.

The following headline figures represent stats from all of the Council's employment programmes (funded by both WG and ESF):

- Total Participants Supported 821
- Qualifications Gained 104
- Job Entries 259\*

(\*this figure includes improved labour market situations for underemployed residents)

*(Please note: these figures may include some double counting of participants due to customers becoming eligible for different programmes at different stages; however each outcome claimed represents a separate event).*

The Catering Department took part in a recruitment pilot to increase recruitment to cater for the Universal Primary Free School Meal implementation in September 2023 for all primary age pupil. The pilot was run in partnership with our HR department and was successful in recruiting over 90 new positions to the service area.

For Housing - See comment in Equality Objective 2 Action 1 which will include a team Caerphilly approach involving Caerphilly Homes, the Council's employment team, Caerphilly Cares and the Regional Armed Forces Officer.

For Libraries – see response under Equality Objective 2 Action 1

## **Action 5**

Through investing in our educational and housing stock, and providing apprenticeships, training opportunities and work placements within our organisation, we will increase the number of local citizens who are skilled and qualified workers and contributing to Community Benefits.

## **Progress**

Bedwas and St Martin's Comprehensive Schools established and delivered STEM (Science, Technology, Engineering and Mathematics) workshops undertaken together with support from Willmott Dixon and their supply chain to the Council's annual foodbank appeal and the Free School Meals deliveries.

Housing Repair Operations did not take on any apprentices in 2021. To date 19 have been employed in 2022.

Asset Maintenance and Repairs (HRO and PAMS), recruited 7 new Apprentices (varying trades) this year and we have 25 Apprentices built into our structure, so as Apprentices qualify we will be looking to replace these on a year on year basis.

Full time employment opportunities including apprenticeships, graduate and for long term unemployed will be offered on all Caerphilly Homes new build developments. It will be mandated as part of the chosen contract arrangements that the delivery of targeted recruitment and training outcomes are as equally important to residents and our communities as the new homes we build.

The Catering Department were successful in recruiting an apprentice into their service area, which is continuing to make good progress in completing their qualification and gaining vital experience to support them in finding permanent employment within the industry.

Library services offer work placement opportunities by liaising with support agencies. We will be working with the Caerphilly Cares team to possibly look and offer longer-term voluntary support posts and have used the Kickstart Apprenticeship scheme. Through the latter scheme we have appointed a new library assistant.

Caerphilly Homes currently has 25 largely local, male and female apprentices working within the Asset Maintenance and Repairs team, learning a trade. This the highest number of apprenticeships we have ever had at any one time within this part of Caerphilly Homes.

## **Action 6**

To further develop an inclusive approach to apprenticeships

### **Progress**

In 2022, the Council held a highly successful corporately funded recruitment campaign for Apprentices, appointing 30 across a range of services. 5 of the Apprentices have since secured permanent posts within the Council.

Additionally, in the same year, Housing Services independently ran their own recruitment campaign for Apprentices, appointing 13 across a range of trades, 1 of which has already secured a permanent role within the service.

Funding has been committed to support Apprenticeship recruitment every 2 years, with the next scheduled to be held in 2024. Again, the focus will very much be on inclusivity and creating opportunities for all.

The Council launched a new Recruitment Team in the summer of 2023. Based within Human Resources, the team is working collaboratively with managers across the organisation to address their varying and complex recruitment needs. Supporting the organisation to embed workforce planning, the team will help managers to shape their workforce, exploring different pathways to employment including the possibility of creating Apprenticeship opportunities funded by services.

## **Equality Objective 3 - Community Cohesion - Promote and facilitate inclusive and cohesive communities**

Community cohesion as defined in Welsh Government's Community Cohesion National Delivery Plan (latest document) is described as the ability of all communities to function and grow in harmony together rather than in conflict. It aims to build communities where people feel confident, that they belong and are comfortable mixing and interacting with others, particularly with different people and people with different protected characteristics.

Caerphilly adopts the principles that a cohesive community is one where:

- there is a common vision and a sense of belonging for all communities;
- the diversity of people's backgrounds and circumstances is appreciated and positively valued;
- those from different backgrounds have similar life opportunities;
- strong and positive relationships are developed between people from different backgrounds and circumstances in the workplace, in schools and within neighbourhoods.

When we refer to 'communities' we are often describing a geographical neighbourhood, but the term community may also be used to define individuals who share a protected characteristic (for example ethnicity or culture, age group, religion or belief, sexual orientation, language, gender) or interests.

### **Action 1**

Raise the profile for discriminatory incidents reporting in schools through further staff training

### **Progress**

The Local Education Authority (LEA) delivered 4 training sessions on discriminatory incident reporting and awareness raising of the Anti-Racist Wales Action Plan.

- 1x New Headteachers
- 2x Headteachers
- 1x Pastoral Leads

Schools should record and report all discriminatory incidents to the Local Education Authority (LEA). All schools provide data at the end of each term and any schools not providing a response are followed up. The LEA collates the data to explore trends and to provide support to any schools which provide data of concern. Data collection was significantly disrupted in 2019-2020 due to the impact of diverting resources to managing the pandemic, so this data has not been included in the table below. The LEA recognises that the number of reported incidents is unlikely to reflect the actual number of incidents across our schools for several reasons, including a mismatch between pupils' experiences and their willingness to share their experiences (as highlighted by a number of external reports based on pupils' experiences across Wales).



The LEA has made efforts to raise awareness of the need to report incidents and the thresholds for reporting. The following table shows the data collated.

Type of discrimination	2015/16	2016/17	2017/18	2020/21	2021/22 (2 terms)	2022/23
Caring /Cared for	2	0	0	0	0	0
Cultural	3	18	3	6	7	9
Disability	2	2	5	2	1	3
Gender	5	7	4	3	5	12
Homophobic	27	31	26	24	29	46
Language	3	14	2	4	0	28
Nationality	11	8	5	6	7	4
Pregnancy	0	0	0	0	0	0
Race	54	57	71	47	70	107
Religion or belief	4	7	15	6	2	14
Transphobic	-	-	-	-	-	1
<b>TOTAL</b>	<b>111</b>	<b>148</b>	<b>129</b>	<b>99</b>	<b>121</b>	<b>224</b>

## Action 2

Evolve the regional integrated approach, to improve the health and well-being of individuals and families subjected to violence against women, domestic abuse and sexual violence (VAWDASV)

## Progress

Improve health and wellbeing through implementation of integrated Active Travel routes.

The Council is collaborating closely with colleagues across the region through Gwent VAWDASV to develop improved training solutions to upskill the workforce and raise awareness.

Training for Group 1 VAWDASV has been included in the induction process and recruiting managers are requested to ensure all new staff access the eLearning through our Learning@wales pages.

Further work is required to ensure the volume of Group 2/3 training keeps pace with the Group 1 training.

In relation to monitoring community tensions, we work closely with both internal and external partners to ensure awareness is raised of any concerns and we co-ordinate an appropriate response. Internally, Private Sector Housing and Caerphilly Cares are important partners to achieve this objective.

We are also working closely with our colleagues in private sector where we have applicants living in unsuitable accommodation and where they have a physical housing need that cannot be met in the borough are working with our Registered Social Landlords (RSL) partners to ensure that when new developments are coming on line these accommodation needs are being considered.

Supporting People service has been commissioned and is in place and is accessible to anyone who requires support and we have also set up pathways with Caerphilly Cares, our Caerphilly Homes rents teams and our RSL partners for early referral and discussion regarding preventative measures for homelessness.

The migration from a property-based to a person-based IT system continues to be progressed to ensure that in future, all Caerphilly Homes records are held in one place. This will improve accessibility of person-centred information from all Housing service areas, increasing the likelihood of incidents/trends being identified that could indicate the possibility of domestic abuse.

Awareness of incidences of domestic violence affecting our tenants has been reduced since the discontinuation of the Domestic Abuse Conference Call several years ago. Should they be made or become aware of domestic violence involving a tenant officers, in addition to considering their Duty to Report, are expected to attempt to make or request a welfare call or visit to the victim to offer support and assistance, supported by partners where necessary, and give consideration as to whether the offer of target hardening equipment or other assistance would be appropriate. These staff also work with the customer to help them to report to third parties as sometimes victims feel reluctant to report incidents.

All staff have received safeguarding training appropriate to their role and are aware of the Duty to Report. We also offer target hardening if there is no ongoing relationship between the parties, and support transfers. The introduction of the Renting Homes Wales Act will enable us to further assist victims due to the ability to approve the removal of contract holders from a joint tenancy, without bringing the whole contract (tenancy) to an end.

Details of the alleged perpetrator and alleged victim are recorded on data entries involving domestic abuse by the relevant case worker to avoid assumptions being made.

Further discussions are being held with Llamau to recruit a Domestic Abuse support worker to be based within the Housing Solution team to support and provide advice to those who present as a part of a holistic assessment and to prevent homelessness where possible.

The use of local lettings policies is relevant both for new developments within existing communities, and those existing communities where we are aware of concerns as to community cohesion. The Operation Bang for bonfire night and our work within the community following the murders at Long Row would be examples of partnership working, together with the use of management discretion to facilitate emergency moves for tenants.

### **Action 3**

Advocate community diversity work with services and partners to celebrate equality of difference by championing commemorative and celebratory dates (i.e. Refugee Awareness Week, Holocaust Memorial Day, and Hate Crime Awareness Week)

## Progress

Cohesion Team update;

- The Cohesion Team has mapped local Ukraine and European communities to support leadership teams in preparation for arrivals regarding the Family Visa Scheme for Ukraine.
- We have also worked with communications teams across the region in respect to the Home for Ukraine Scheme and the publishing of accurate information on council websites and via Social media.

Aside to supporting refugee resettlement, the Cohesion team have recorded further episodes of the regional podcasts which provides a platform for lesser heard voices, sharing local stories from minority community members from a variety of background focusing on Trans issues, Black and Asian minority communities and refugees. One of which includes a local resident who arrived into the UK as an Asylum Seeker, his story helped in promoting key messages of community spirit and belonging. This podcast depicts 'his' story and how he has made South Wales his home. The podcast has been published on Spotify (and was promoted during refugee awareness week).

Other campaigns also feature in the work of the Cohesion Team throughout this period;

- Ramadan campaign – 'Did you know' social media campaign alongside school-based activities were also conducted.

Learning about other religions broadens perspectives and helps build a culture that reduces intolerance, hate speech and bullying. Last year we put together a Ramadan live event for schools, this was a collaborative project with colleagues from Newport and a local imam (Islamic leader). Even though this was a live event last year, it has still been used this year as a great resource to explore Ramadan and Eid - [\(47\) Ramadan 1st Session - YouTube](#)

We have also provided useful resources to all schools which look at:

- The origins of Ramadan
- Provide an understanding on why Muslims fast for a month
- Discuss the importance of observing Ramadan in the UK
- LGBT plus history month – during this month we developed an awareness campaign, the 'did you know' campaign was developed to increase the knowledge of readers ranging from the origins of the rainbow flag to a breakdown of terms such as bi, non-binary, pansexual etc. and what these mean alongside key messages of acceptance.

We have hosted further training with the hate crime for schools project. We have also been in discussion with local education authorities, in particular with regard to a select number of schools that have reported an increase in hate related bullying within the region to conduct a series of classroom workshops and assemblies to support the wider themes of acceptance.

During this period, the Cohesion Team also hosted 3 regional Homes for Ukraine open evenings with hosts and their guests – these sessions have supporting authorities conduct the appropriate checks required as part of hosting families. The third session was co-delivered by a clinical psychologist and centred on well-being, promoting good wellbeing amongst host and guests and reflected the emotional challenges (and

techniques to overcome these challenges) that may be experiences in hosting families who have experienced trauma

Throughout this period the Regional (West Gwent) Cohesion Team also ran the annual Community Cohesion Small grants scheme and approved community projects that support themes of togetherness and inclusion;

### **Project #1 - TLC Café (run by year six students)**

Funding was made available for this Caerphilly based project to support the café being set-up during the mornings over the course of a week in March 2022 (10:00 – 11:30 each day). The project's success has now led this to become a permanent arrangement in the community.

During the week of activities, as well as providing refreshments the Café also hosted activities organised for each of the mornings:

- Monday refreshment, chat and bingo
- Tuesday refreshments, light exercise, puzzles, arts and crafts
- Wednesday refreshments, chat, board games and baking
- Thursday refreshments, chat, quiz and entertainment by pupils (linked to winners of Saint David's day competitions)

The success of the week has now meant the Cafe will be used on a regular basis with a main aim to forge relationships in the community to benefit peoples through intergenerational activities that include sharing experiences, knowledge and skills

Social Media continued to be instrumental in the sharing of information and the championing of commemorative dates, none more so in the marking of Black History Month and Hate Crime Awareness Week during the second quarter. Where we developed campaigns, projects and engaged with the whole school estate in the planning and delivery of school activities and have supported local authorities and community groups in the coordination of events (i.e. the unveiling of the Roy Francis Status, Brynmawr).

### **Black History Month included;**

#### **Schools/community:**

Poetry competition and resources were distributed to Schools in the lead up to BHM. Resources included lesson plans, posters and assembly presentation were also circulated, including:

- List of TV and book resources linked to Black history
- Information about the Windrush exhibition and how Schools can attend

#### **Corporate:**

- Staff Bulletin which included 'did you know campaign' (including information on the key days. Social achievement of Black communities members, historical milestones etc.)
- The link to the pre-recorded Cohesion Team's 'Valley Voices' podcast of Sean Wharton, a prominent campaigner for Black Minority Ethnic Communities was also included.

- Further links to events taking place across South Wales with Black History Wales such as their launch and premier at the Senedd.
- Online quiz for staff – celebrating the achievements of the Black communities (internationally/national).
- Social Media content saluting our sisters. A post circulated across all social media platforms (one on each day).
- Support provided to the coordination of the unveiling of Roy Francis statue. Regional ITV news coverage were in attendance, the Cohesion Team supported the press release.
- Sharing of the Windrush video that Torfaen Comms have created to showcase Gwent exhibition.

### **Hate Crime Awareness Week;**

- The Community Cohesion Team developed a series of activities for local schools which mark the importance of inclusivity. Canvas were distributed across a series of schools, each school had the opportunity to decorate the canvas with a theme of cohesion/inclusivity and submit into a regional competition – with a winner awarded to Primary School and Secondary schools.
- Social media pack circulated throughout the week – working with Victims Support to provide consistency in the messaging.
- Hate Crime Road shows have been held in Cwmbran, Ebbw Vale and Caerphilly (Town) throughout the week (Cohesion Teams held a presence at each)
- The Cohesion Team have also conducted a series of Anti-discrimination sessions for Comprehensive Schools throughout the week.

### **Action 4**

Engagement – develop a minority communities citizens panel as a means to improving the engagement with lesser-heard voices.

### **Progress**

We have continued to engage with seldom-heard groups through existing networks where good relationships have already been established. We have established good relationships with several groups e.g. Caerphilly People First, Caerphilly Parent Network, Menter Iaith Caerffili etc. and will continue to expand these network contacts across a wider range of groups to ensure all those protected characteristics groups are engaged more effectively.

### **Action 5**

Community cohesion team will work with LEA (Local Education Authority) and partners to develop improved equities practices and anti-discrimination work in schools. (This will include training to staff, raising the profile of discriminatory incident recording, support for schools to develop the inclusion of equalities work in the curriculum through schools workshops and a schools swap project linking a local school to one in a different and contrasting area)

## Progress

Further to discussions held with regional Channel Chairs – who have noted a marked increase in the number of referrals from local schools to ‘Channel’ (which include cases of learners expressing racism and misogyny), the Cohesion Team have developed an Anti-Discrimination programme which will be delivered to schools across the region. To combat the raise in these behaviours and attitudes this programme (which consists of a 2-hour workshop provided to classrooms in secondary Schools) explores how we are influenced, how this influence can impact our behaviours towards others and the impact this can have.

This approach further extends our existing programme of anti-discrimination sessions which are delivered in a primary setting. We continue to work in collaboration with Healthy Schools Officers and Channel Chairs on the role out, ensuring this opportunity is directed towards appropriate and ‘at risk’ audiences.

During Quarter four – 9 sessions have been facilitated by the Cohesion Team received by over 70 pupils in schools that include;

- Lewis School Pengam, year 9s (Caerphilly)
- Abersychan Comprehensive year 8-9 (Torfaen)
- Cwmffrwdor year 6 (Torfaen)
- Our Lady’s of the Angel year 6 (Torfaen)

80% of pupils expressed a marked improvement of awareness of the topic (including what is racism, how our attitudes of others have the potential in influence our behaviours, how we recognise this, what to do if you experience or witness discrimination within the community and/or school).

We are continuing to work with Healthy Schools Officer and Channel/Prevent leads on the future delivery of the programme – with the Cohesion Team securing places on Head Teacher’s forums across the region to promote this opportunity.

8 schools participated in the Anti-hate Crime Project.

Education Psychologists (EPS) commissioned 6 workshops from No Boundaries which is being offered to up to 180 members of staff (30 in each session). Workshops running in November 2023. So far, 50 members of staff have signed up to attend.

The Regional Cohesion Team continues to liaise with Victim Support on the roll out of Victim support training – we are now in discussion to hold a session for Youth Offending teams across the region.

We continue to deliver our in-house anti-discrimination workshop to a number of primary schools across the region.



Further Emphasis has been placed on promoting inclusion online – the below video generated over 30,000 clicks on Facebook alone.

[Instagram Inclusion togetherness video](#)



**Action 6**

Engage with EU nationals with regards to the EU Settlement Scheme

**Progress**

The EU Settlement Scheme (EUSS) is now closed.

Private sector housing have been involved in sourcing and assessing suitability of accommodation for the Afghan and Syrian resettlement schemes and for Ukraine.

The Regional Community Cohesion Coordinator (RCCC) has provided briefings for key officers in the lead up to the launch of the Settled Status scheme. Migration mapping, reflecting inward migration into each authority, has also supported local authorities (LAs) in their Brexit resilience building.

We continued to prioritise awareness raising of the EUSS and worked collaboratively with partners such as Citizens Advice Bureau (CAB), Ethnic Youth Support Team (EYST) and Local Education Authorities (LEAs), alongside Police and Registered Social Landlords. Utilising local networks, resident newsletters and social media to increase awareness. Supported via the Cohesion budget, we also printed EUSS literature available in multiple EU languages which have been distributed across the region to all departments, schools and community buildings.

During this reporting period, we worked with libraries and partners to host drop in sessions to promote the scheme, and utilised the EUSS funding made available by Welsh Government to purchase additional hard copy resources. Additionally the Regional Cohesion Team commissioned a EUSS Radio Advert on Capital Radio, which was broadcast for 6 months in the lead up to the EUSS deadline. We also established the 'We are digital' services in all boroughs of West Gwent, meaning local libraries were able to assist those making an application.

Overview of progress:

- Facebook campaign via Facebook Marketing
- Regional radio campaign (i.e. Capital radio)
- South Wales Argus (advert Paper and Website)
- Resident newsletter
- Regional drop in sessions

Whilst large-scale migration is not experienced in the West Gwent Region the possible impact of EU nationals leaving the area had been explored within local resilience forums. As part of this discussion the RCCC mapped all economic migration across West Gwent LAs – highlighting the communities where EU migrants have settled. This has supported readying the local economy to promote the settled status scheme in areas which have experienced higher levels of inward migration.

The RCCC has held discussions with the Inclusion and Equality organisation (Victim Support) on the collation of data, crime trends and stats have been shared with lead officers at the community tension monitoring group.

## **Action 7**

Monitor community tensions – link with Partners and take proactive steps to mitigate tensions from escalating in the community

## **Progress**

Throughout this period the Regional Cohesion Team focused efforts on improving awareness of hate crime and the available reporting channels, this has included;

The coordination of Hate Crime Training for elected members and youth services across the region

In collaboration with Victim Support, we have adapted training to different audiences and delivered sessions to Blaenau Gwent's Youth Service, Torfaen Youth Service, and Caerphilly elected members.

Hate incidents are discussed as cases at Partnership Tasking meetings. Any cases that come to the attention of the partnership are monitored and dealt with. The majority of these are reported to police and are dealt with accordingly by police action. The Regional Cohesion Team monitors these incidents to look at emerging trends, hotspots etc. and put plans in place when trends are identified.



Housing have taken the lead with the Homes for Ukraine scheme and provided additional accommodation via the Transitional Accommodation Capital Programme Project Board (TACP).

## **Action 8**

To continue support for the LA's engagement with the UK Resettlement Scheme

## **Progress**

Significant focus throughout Quarter 1 centred on the local authorities and partners developing the local response to the Homes of the Ukraine scheme.

Each local authority area stood up a multiagency Ukraine response group. The cohesion team were present at each group offering practical support, sharing experience of previous resettlement programmes. This also includes sharing any community tensions that we have been made aware of either via social media or through other tension monitoring groups.

## **Equality Objective 4 - Inclusive Engagement and Participation - Engage with citizens to encourage participation, to have their voices heard when planning service delivery**

The availability of information in various formats is essential to ensure that all citizens are able to participate in any engagement exercise. Whilst advances in technology enable us to provide information in digital formats, there continue to be barriers to engagement. Transport, mental health, socio-economic status, low literacy and numeracy skills and particular difficulties experienced by seldom heard groups, are amongst the barriers that continue to prevent citizens from engaging with the council and wider support services.

This Objective reflects one of the council's Corporate Objectives to 'Support citizens to remain independent and improve their well-being'. It includes supporting people to help themselves by providing comprehensive advice and guidance including signposting to other services. It is about having meaningful conversations with people to help them identify what matters to them, which will inform services to suit their needs.

### **Action 1**

Support citizens to 'help themselves' by providing comprehensive advice and information, including signposting to other services

### **Progress**

Library Services are redeveloping and refurbishing Rhymney Library to a Community Hub model setting. The library will offer an extended support face-to-face network including Council officers, community partners and a Caerphilly Cares Duty Officer.

Working with Regener8 Cymru, the Cwm a Mynydd Rural Development Team supported and provided 80% project funding to the Managing Anxiety and Supporting Resilience Project. Regener8 Cymru worked with a range of schools, including Heolddu Comprehensive and Ysgol Gyfun Cwm Rhymni to deliver class scale plus bespoke and tailored project support to young people. The project helped reduce truancy, increased pupil engagement, and provided skills to support young people become more resilient in and out of school life.

Employability projects have continued to sign post service users to many other services including internal partners e.g. Supporting People, Caerphilly Cares, Community Education as well as external partners Job Centre Plus, Careers Wales, MIND, and many more.

Within Social Services, the Information, Advice & Assistance Team provide comprehensive guidance and signpost to alternative and more appropriate services and the Dewis Cymru website aims to help people with their well-being and provides information and advice for adults and their carers.

The Early Years Integration Transformation Programme has been moving forward to implement a borough wide early years model for antenatal to 7 years. The Early Years Hub now incorporates the Family Information Service team and wider professionals to support families have the right support at the right time to meet their needs. Frontline staff have trained and are implementing What Matters conversations with families to

support a strength-based approach with interventions to meet the family's needs and not just give a menu of services to meet wishes. The What Matters approach aims to build a relationship with the family to understand root causes and not just superficial symptoms to support the building of family resilience and move away from reliance on services.

The Early Years website has been developed from the family perspective to ensure information is easy to find and linked to wider partner sites to ensure families have the most relevant updated information. Dewis is now being used for Family Information Service Childcare and family activity searches to ensure a comprehensive national database for searching beyond the Caerphilly borough boundaries. Both the website and Dewis database will continue to evolve to ensure families have comprehensive information available. In addition, we are working with midwifery to implement Badgernet Midwifery notes in 2023 which will push information directly to families antenatally across Gwent and ensure families have the information direct to their phone.

The Early Years model is now borough wide to ensure families who need support living outside of Flying Start areas are able to access the support for their child's development and family circumstances. While there is not yet funded childcare placements for all families, there is access to antenatal programme, family support, early language development, child development and early support for developmental delays. This has removed barriers for many vulnerable families who lived outside of Flying Start areas.

The development of the Early Years model has been part of a system thinking approach in the last two years. Families and stakeholders have helped us to design the values and principles of the early years system, through sharing their own lived experiences, explaining what they valued from the support they had accessed, and highlighting the aspects which showed less value, duplication, or bureaucracy. The family and stakeholder involvement were critical in developing a system based on values and principles and avoiding assumptions which caused unnecessary bureaucracy / paperwork. Families continue to inform the system change as it is implemented.

Advice provided on website and CHR. In addition Estate Management Officers, Rent Officers and Tenancy Enforcement Officers make appropriate referrals and signpost customers.

Through the Caerphilly Veterans Support Hub we have arranged for many of the Caerphilly staff to attend and give advice. Cornerstone homeless charity is employed under CCBC Supporting people programme attend each Saturday to help with housing and benefits. In one year she has clawed back over £67,000 worth of benefits for the veterans. Caerphilly Cares and Citizens advice also have attended the hub.

## **Action 2**

Have 'meaningful conversations' to help citizens identify what matters to them to inform outcome focussed planning.

## **Progress**

We have continued to engage with residents in our communities and stakeholders and consulted with them on key issues that will affect them.

The development of a new digital engagement platform called “The Caerphilly Conversation” to be launched in April 2023. This will act as a central repository for all consultation and engagement activities across the Council and provide a number of online interactive engagement tools including mapping, quick polls and online discussion boards. To find out more please visit:

<https://conversation.caerphilly.gov.uk/>  
<https://trafodaeth.caerphilly.gov.uk/>

Following the establishment of our internal Consultation and Engagement Working Group, the group has continued to meet quarterly to coordinate and share engagement plans and good practice. An action plan has been developed for the group and a database of planned activity is updated on a quarterly basis. The group has been particularly useful in bringing together officers, including the Caerphilly Cares team and the Youth Service, who work with all sectors of our communities to support engagement with underrepresented groups.

Rent consultation on Affordability, Value for money and cost of living crisis. Had responses from over 300 people via completed surveys, online and face to face sessions with tenants.

With the new WHQS 2023 requirements, include tenant engagement on the programme. Tenant Information Exchange held every 6 to 8 weeks (online/face to face) opportunity to find out what is happening in Housing and share their views. Guest speakers have covered topics such as tenancy enforcement, new build programme, tenant participation strategy.

Regular email to involved members providing details of opportunities for them to participate both with Caerphilly Homes and TPAS Cymru.

Regular updates and good news stories posted on social media and using Egov. E.g. you said, we did in relation to Rent consultation.

Change to Caerphilly Homes is currently undertaking a comprehensive tenant satisfaction survey with results due in January 2024, for discussion with Members and subsequent submission to WG in February 2024.

Consultation undertaken with all contract holders (tenants) on proposals to modernise the provision of the Landlord Service to improve customer access to officers within the community.

Early Years – See response against Equality Objective 4 Action 1

The Cwm a Mynydd Rural Development Programme team continue to engage in dialogue with a broad section of Caerphilly residents and organisations through the Caerphilly and Blaenau Gwent Local Action Group, a partnership of third sector, private sector and public sector members. The group has an eligible voting membership of 23 and is comprised 52%Male 48%Female 0%other. The group is an active forum for the development and funding of projects and interventions targeted at rural communities that are often experience greater isolation, poverty and greater access to service provision than more urban populations.

The Rural Development Team held a series of engagement days to enable stakeholders and project partners to actively contribute to the development of the rural development grant funds and targeted support. These were facilitated by Cwmpas who delivered two sessions and Welsh ICE who delivered one. Participants helped frame issues affecting rural areas, the opportunities for meaningful project development and a suite of project ideas to develop. From the sessions, support for food start-ups and Welsh language business start-up clubs has been commissioned and developed.

We held a public consultation on the Covid Memorial Woodland in March last year, one in person at the community hall in Cwmfelinfach and online.

Additionally, the Green Space Strategy section and Rights of Way team support the Local Access Forum where members from organisations and the wider community engage around access to the wider rights of way network.

### **Action 3**

Identify and support carers

### **Progress**

To support individual carer's well-being, we have:

- 17 leisure memberships provided for adult carers
- 67 leisure memberships provided for young carers
- Organised over 87 activities for all carers, with 1335 carers attending organised and individual activities (some may have attended more than one)
- Provided 55 YC ID card scheme
- Facilitated 61 support groups/drop in sessions
- Increased number of carers on mailing list from 1727 to 2019
- Increased number of carers accessing Facebook groups from 860 to 1172
- Carried out 181 carers' assessments
- Supported carers to successfully apply for approximately £44k in direct grants via the Small Grants Scheme, administered by The Care Collective
- Organised an in person Carers Rights Day, attended by 56 adult carers and 15 organisations

### **Action 4**

Embed the *Consultation and Engagement Framework* into all consultation exercises undertaken by council services to ensure key stakeholders are consulted with and given time to respond

### **Progress**

Endorsed by the Council's Cabinet in February 2020 our 'Consultation and Engagement Framework' outlines the following principles:

- We will empower our residents to have greater influence over the issues that affect them.
- We will increase and strengthen the role of communities in how we live, work and visit Caerphilly county borough.

- This will help us to understand the needs of our communities, which in turn, will help to ensure the services we deliver meet those needs, and that available resources are used effectively and in line with agreed priorities
- We will support communities to take action, by helping them identify needs and support them in developing community led solutions.

Our internal consultation and engagement working group has become a key mechanism to disseminate information, share good practice and embed these principles with staff across the organisation and in turn, further improves engagement practices.

Typically, Housing and other teams across the Council engage with the central team for advice and guidance regarding best practice in consultation and engagement.

**See previous responses for Equality Objective 4 - Action 1, 2 and 3.**

### **Action 5**

Identify service needs of specific user groups; what barriers prevent access, and what actions are required to remove those barriers

### **Progress**

Design standards are implemented to make schemes inclusive and DDA compliant. Also review consultation data to identify needs of specific groups.

During the past year, the Rural Development Programme (RDP) Team have worked with Menter Iaith Caerffili to engage with members of the Welsh language community to identify opportunities for greater provision of services in rural areas through the medium of Welsh. The project engaged with after school clubs, schools, parents and Welsh language clubs to explore how rural support can be tailored to meet their needs. The RDP team are now working to support the delivery of some of the identified projects.

The Covid Memorial Woodland masterplan and frequently asked questions were translated in Welsh for the online consultation.

Early Years – See response against Equality Objective 4 Action 1

The service needs and barriers of the participants form part of the initial assessment process in the employability projects and subsequent action plans are put in place to remove barriers through 1-2-1 support. Communications will continue to support work driven by service areas.

It is recognised that veterans are particularly susceptible to loneliness and social isolation. To combat this many trips have been organised to afford the opportunity that veterans can attend such outings free.

We have managed to organise an excursion once a month. These have included:

- The National Arboretum,
- Imperial War Museum
- London
- Fleet Air Arm Museum
- Cosford Air Museum
- Tenby



### **Female Veterans in Wales**

There are over 15,000 female veterans in Wales. Many have been systematically disadvantaged through their Armed Forces Service. In June 2022 CCBC hosted the first ever Female Veterans Workshop to hear first-hand their experiences in order to advocate for support and change.



A research paper was commissioned titled 'Female Veterans: the forgotten and invisible servicewomen of our Armed Forces.

The paper has been well received and has gone on to inform the UK's first Women's Veterans' Strategy.

We continue to advocate as per the recommendations on the next page.

## RECOMMENDATIONS

Peer to peer support	Transition/ Resettlement	Medical Services	Financial & Employment	'Life Skills' Workshop
<ul style="list-style-type: none"> <li>• Buddy scheme</li> <li>• Increasing support for female veteran run services</li> <li>• Female only therapy groups</li> </ul>	<ul style="list-style-type: none"> <li>• Review of transition officer to ensure quality of support</li> <li>• MOD allow briefs from outside organisations</li> <li>• Female specific toolkit/directory</li> </ul>	<ul style="list-style-type: none"> <li>• Access to a trained Female Mental Health practitioner</li> <li>• Increased research/training into PTSD in female veterans</li> <li>• GP awareness</li> </ul>	<ul style="list-style-type: none"> <li>• Financial credit advice</li> <li>• Support fund for those in need of financial aid</li> <li>• Female specific CTW</li> <li>• Information on benefits &amp; childcare support</li> </ul>	<ul style="list-style-type: none"> <li>• Childcare &amp; time management</li> <li>• Transferability of skills and confidence building</li> <li>• Financial advice on tax, pensions etc.</li> <li>• Career options</li> </ul>

Caerphilly Council are Gold on the Defence Employer Recognition Scheme and offers a Guaranteed Interview Scheme for members of the Armed Forces Community if they pass the essential criteria. Members of the Armed Forces Community are encouraged to work with the local authority's employment team to support into employment. Support is offered via the Council's employment team.

This year CCBC hosted the first ever civil service employability workshop for the Armed Forces Community. The workshop provided advice and guidance on vital skills needed to apply for a role within the civil service.



Barriers to participating online - Tablet loan scheme developed working with Digital Wales and have provided support to assist tenants to join us at online sessions using their own equipment. Also set up dial out so could telephone those who were unable to join us online

A lack of transport and other issues (such as caring responsibilities) may prevent people from taking part in any housing related activities. When we organise activities we make sure that our venues are suitable and accessible.

Ensuring our activities and services are accessible from a language perspective - we have used various translation services, such as BSL, Punjabi, live captioner at our events

Time is also a factor – we are now able to offer online activities for those who prefer to engage this way and offer sessions at different times for those tenants who are working or need to meet during school time.

We have spoken to tenants about how they like to be involved so that we can identify their needs and remove any barriers that are in place where possible.



Currently working on the Customer portal which will provide tenants the opportunity to for example log a repair online etc. This would remove the barrier for tenants with hearing loss as an example to access services in a way that is suitable for them.

The service needs and barriers of the participants form part of the initial assessment process in the employability projects and subsequent action plans are put in place to remove barriers through 1-2-1 support. Communications will continue to support work driven by service areas.

## **Action 6**

Review and update our key stakeholder groups within the county borough that represent protected characteristic groups

## **Progress**

We have undertaken a thorough stakeholder analysis and maintain a stakeholder database that represent protected characteristic groups. This is regularly reviewed and updated. This database is shared with officers undertaking consultation exercises across the service areas.

Contact made using social media and Tenant & Resident Association groups to try to recruit more volunteers from the protected characteristic groups. However, we do not currently monitor these characteristics within our engaged tenant list.

We are aware of some characteristics e.g. age and disability but do not monitor as part of our day-to-day activity or store data. We ensure that where we are aware we offer opportunities to participate e.g. attend specific networks e.g. Tenant Participation Advisory Service Cymru Disability network. Caerphilly Homes is a member of Tai Pawb, an organisation which promotes equality and social justice in housing.

## **Action 7**

Review and strengthen internal processes for undertaking Integrated Impact Assessments and related consultation

## **Progress**

The Council developed an Integrated Impact Assessment during 2020 to include Socio-economic Duty. See above. We also updated the questions asked around impact on Welsh Language in line with guidance published by the Welsh Language Commission relating to the Policy Making Standards.

The Armed Forces Covenant was passed as law in December 2021 for Housing, Education and Health. Staff will have to apply 'due regard' in respect of the Armed Forces Community. Caerphilly was the first local authority in England and Wales to include consideration for Armed Forces Community as a category under the Socio-economic Duty section.

Presentations have been delivered and the section shared with a number of local authorities as an example of good practice. Due regard must be considered in the following circumstances:

- How obligations and sacrifices affect access to requirements of my public service?
- Are the Armed Forces Community disadvantaged compared to the end user experience of local civilians?
- If so, should I mitigate/resolve this disadvantage?
- Can disadvantage only be resolved through Special Consideration?
- Guidance will be provided but has to go through parliament for approval
- Due Regard must be in place by the end of 2022

## **Action 8**

Ensure that activities related to service change and transformation embed the principles of good consultation with communities as part of 'The Caerphilly Conversation'

## **Progress**

As part of the ongoing Caerphilly Conversation, residents were engaged in a "What Matters" engagement during November/December 2022.

<https://conversation.caerphilly.gov.uk/council-budget-setting-2023-2024>

The development of a new digital engagement platform called "The Caerphilly Conversation" to be launched in April 2023 will act as a central repository for all consultation and engagement activities across the Council and offer an additional tool for engagement. To find out more please visit:

<https://conversation.caerphilly.gov.uk/>

Housing will follow all corporate guidance and where necessary consult with our Consultation and Public Engagement Officer.

## **Equality Objective 5 - Welsh Language - To ensure the Welsh speaking public can access services that comply with the statutory requirements**

The Equality Act 2010 does not cover Welsh language issues but we have a set of standards under the Welsh Language (Wales) Measure 2011. These are detailed in the regulations approved by Welsh Government as the Welsh Language Standards (No. 1) Regulations 2015.

Internal working practices continue to evolve to ensure that the principle of language equality is respected in every aspect of service provision. To assist the council in meeting the requirements of the Welsh Language Standards and to meet the needs of the Welsh speaking population of the county borough, we work in partnership with organisations such as; Menter Iaith Caerffili, Fforwm Iaith, Welsh medium schools etc. This work is detailed in the county borough's Five Year Welsh Language Strategy 2022-2027.

Cabinet approved the new Five Year Welsh Language Strategy 2022-2027 for the county borough on 9 March 2022.

We must comply with all agreed Welsh Language Standards as detailed in the Council's Compliance Notice to ensure that the Welsh-speaking population, whether they be staff, citizens, students or visitors can access the council's services in Welsh.

Our progress is recorded each year in the Welsh Language Standards Annual Report, which is published below for 2022-2023. The council's Cabinet approved publication of the report on 14 June 2023. To view the 2022-2023 report click [here](#).

### **Action 1**

Raise awareness amongst staff that come into contact with children and young people of the need to foster positive attitudes towards the Welsh language

### **Progress**

Libraries hold an extensive number of Welsh language stock available as book, eBook or eAudiobook format.

Youth Support Grant funding is enabling Cluster based provision in the North and South of the borough to develop Welsh Language youth work delivery, supporting staff in their work with young people and in developing provision for young people, this includes recent provision of youth work through the medium of Welsh, and conversational Welsh sessions for young people with staff who are Welsh learners.

Welsh Language Partnership work between the Youth Service, Urdd, Menter Iaith and SYDIC is continuing throughout 23/24 to ensure the Service is developing its accessibility for young people to access youth work in Welsh and engage in Welsh culture and heritage learning through an enhanced and bilingual curriculum.

A new Welsh Language Youth Club has opened in the Service's new centre at Virginia Park. Initial engagement levels are very good, as the club develops, the service will support the provision with enhanced curriculum delivery and opportunities for accredited learning through the medium of Welsh, and youth voice and participative processes, linked to the Youth Forum.

In March 2022, the Council's 5-year Welsh Language Strategy was approved following consultation with key stakeholders. Internal stakeholders included the Youth Service, Early Years and Library Service.

The Welsh Language Standards require the council to develop a 5-year Welsh Language Strategy that sets out how it intends to promote the use of the Welsh language, and facilitate the use of the Welsh language more widely in the county borough.

The strategy must include a target (in percentage terms) for increasing or maintaining the number of Welsh speakers in the area by the end of the 5-year period. In addition, the strategy must include a statement setting out how the target will be met. The strategy must be reviewed and renewed at the end of each 5-year period (Standard 145).

In developing the new strategy the Council undertook a range of evidence gathering and pre-consultation engagement activities to develop a revised set of actions of the draft 5-year Welsh Language Strategy 2022-2027. These actions will enable us to plan how we will promote the Welsh language and facilitate the use of the language locally to increase the Welsh speaking population over the next five years.

The objectives in the Strategy include:

- The Family – More Welsh spoken at home
- Children and Young People – Children and young people use Welsh outside of education settings and understand its value as a skill in future life. Children and young people have better access to social events and services in Welsh.
- Communities – Community groups and businesses increase and support the use of Welsh within their localities.
- Welsh Language Services – Promote and improve availability of Welsh medium services in Caerphilly county borough
- The Workplace – Increase opportunities for people to use the Welsh language in the workplace
- Infrastructure (Policies and Practices) – Organisations and services integrate the Welsh language into all policies and activities.

To view the Strategy please click on the following link: [5-Year Welsh Language Strategy 2022-2027](#).

For Children's Services, all children that we work with are encouraged to engage in education and training and in relation to Children Looked After; their carers are clear about the need to promote Welsh language skills in line with the National Curriculum in Wales.

## Action 2

Develop bilingual leadership skills amongst young people to help them become community champions of the language within their communities

### Progress

A project involving books for schools have been created bilingually and workshops conducted through the Welsh language were delivered in the development process. The book - Ein Llyfr – Ein Hanes: Llewellyn Bren was co-produced with local historian Dr. Elin Jones and school children to showcase and chart the life of Llewellyn Bren and engage school children across the county with local history. The book has been distributed to every primary school in the county borough.

## Action 3

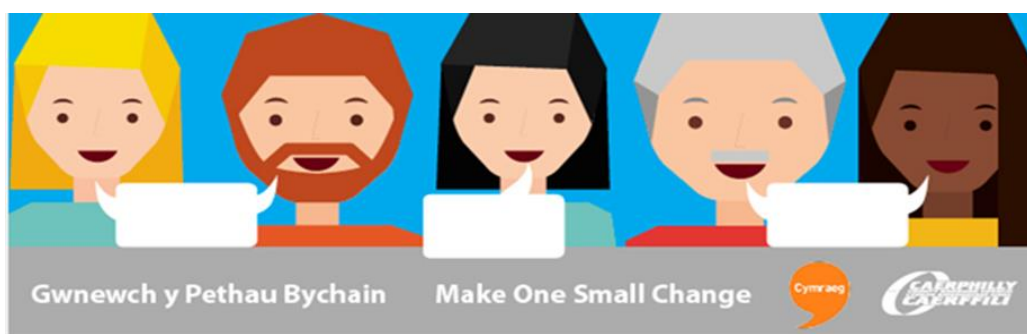
Promote the availability of bilingual services by ensuring Welsh speakers and learners within service areas wear an appropriate lanyards /badges

### Progress

We keep a stock of 'laith Gwaith' lanyards and badges for staff to request. They are requested on a regular basis and officers are aware of whom to contact to receive them. All our frontline service officers have been given these resources to use.

## Make One Small Change Campaign

On St David's Day 2022, we launched a campaign where colleagues, through a year-long engagement campaign, were encouraged to 'make one small change' to further their use and understanding of the Welsh language, particularly within the context of the workplace. Our '[Make One Small Change](#)' campaign shared ideas, tips and encouraged colleagues to make a pledge about small changes we can all make.



The key message throughout was that there are many small changes that all of us can make in our daily lives which, collectively, can make a big difference. Among these pledges were to use the cashpoint in Welsh, read a Welsh book, and sign up to learn Welsh.

We also launched for staff and internal 'Clwb Clebran' (chat club) to encourage Welsh speakers and Welsh learners to come together and speak Welsh in a social context at work.

We celebrated Diwrnod Shwmae on 15 October 2022 with an online campaign to raise awareness of the significance of the event. Service areas with social media accounts were encouraged to use #shwmaesumae and #shwmaecaerffili.

On 7 December we celebrated Mae Gen i Hawl (Welsh Language Rights Day). We used social media again to ensure residents are aware of their rights as Welsh speakers when accessing services.

Internally we made reminded staff about the Welsh Language Standards and what is expected when communicating with members of the public. This included information on answering phones bilingually, ensuring automated bilingual out of office messages are correct, making sure general correspondence is bilingual, and ensuring that Welsh speakers wear lanyards with the Work Welsh logo on them.

**See Page 17 - Equalities Promotion Work and News Stories**

#### **Action 4**

Support the development and promotion of a directory of Welsh medium services available locally

#### **Progress**

The Early Years Hub offers a bilingual service to families and has all available registered childcare including Welsh medium available to the public on the Dewis database search engine. Early Years commissions Menter Iaith to support our English medium settings to improve the Welsh offered in the setting as well as support Welsh learners to improve language in Welsh medium settings. Early Years provision has been mapped and actions to improve Welsh language provision are given priority.

#### **Action 5**

Ensure that Welsh medium events and activities are a part of the Council's community events programme

#### **Progress**

Caerphilly Library Service regularly create, re-tweet and re-post information from Welsh language organisations on our social media platforms.

This year the Countryside Service has undertaken the following:

- Provided 2 guided walks through the medium of Welsh to local walkers in the country park as part of Menter Iaith Caerffili's Clwb Ceredded
- Attended 2 Welsh medium Christmas fairs at Ysgol Penalltau and Llancaiach Fawr

In addition, we advertised for a Welsh speaking Education Officer which enables Welsh language schools to access educational visits to the park including pond dipping, forest school activities and woodland discovery sessions through the medium of Welsh. The officer will start in the role in May 2023.

Since the summer we have held 3 Welsh language/bilingual school visits for nearly 110 pupils with schools based within Caerphilly county borough. This work forms part of the Stronger Roots Program, delivered in collaboration with the NHS, and which have also been delivered in Welsh.

In addition one of our Rangers at Parc Penallta is currently undertaking Welsh lessons and another Ranger was recently supported by the Council and attended a week residential Welsh course at Nant Gwrtheyrn, Llŷn Peninsula.

The Summer of Fun grant actively supported Urdd and Menter Iaith to offer summer activities through the medium of Welsh for children and young people.

The Strategy and Planning Officer in Early Years is actively engaging with members in the Early Years team to support their access to Welsh language courses and support Welsh learners to increase their confidence to use Welsh in the workplace. In addition, the workforce audit across Early Years has identified Welsh speakers who are happy to support Welsh learners to use their Welsh in settings and the workplaces increasing confidence.

We are also working with Mudiad Meithrin to develop Ti a Fi around the borough to improve access to provision for families.

A number of events provided by Menter Iaith Caerffili are run in partnership with council services, for example the Welsh medium Walking Group is supported by a Ranger from Countryside Services, and the Summer of Fun grant actively supported Urdd and Menter Iaith to offer summer activities through the medium of Welsh for children and young people.

## **Action 6**

Promote Welsh language as a recognised objective for managers, to enable them to map Welsh language provision across their service area and increase capacity where necessary

## **Progress**

Library Service staff continue to wear the Iaith Gwaith and Dysgu Cymraeg lanyards at our service points.

Library staff are actively encouraged and supported to enrol on Welsh language courses supported by the authority.

Early Years – See response against Equality Objective 5 Action 6

During 2022-2023, the RDP team undertook its appraisal of Welsh language skills for the current year. Two confident Welsh language staff members and two learners are employed within the team of 4.

The Green Space Strategy Team recruited a Welsh Language Education Officer to increase our service areas offer to the Welsh Language community. The current audit identified two fluent Welsh Language officers, one confident learner and one additional learner within the Countryside section.

All of our printed material is bilingual, and the Welsh text precedes the English text. In 2022, the Council held a highly successful corporately funded recruitment campaign for Apprentices, appointing 30 across a range of services. 5 of the Apprentices have since secured permanent posts within the Council.

Additionally, in the same year, Housing Services independently ran their own recruitment campaign for Apprentices, appointing 13 across a range of trades, 1 of which has already secured a permanent role within the service.

Funding has been committed to support Apprenticeship recruitment every 2 years, with the next scheduled to be held in 2024. Again, the focus will very much be on inclusivity and creating opportunities for all.

The Council launched a new Recruitment Team in the summer of 2023. Based within Human Resources, the team is working collaboratively with managers across the organisation to address their varying and complex recruitment needs. Supporting the organisation to embed workforce planning, the team will help managers to shape their workforce, exploring different pathways to employment including the possibility of creating Apprenticeship opportunities funded by services.

### **Action 7**

Consider the impact on the Welsh language when planning housing developments, in particular Welsh medium school places, street names etc.

### **Progress**

Welsh Language is a material planning consideration which is embedded within current Local and National Planning Policy. Street names are encouraged to reflect the history of an area and bilingual policy in place.

The majority of historical street names are monolingual. New street names are allocated on a 50/50 basis, however at present the bias is to Welsh street names to rectify the historic imbalance. The gazetteer can hold both English and Welsh addresses and where a street name is bilingual, i.e. it has a bilingual street plate, and it is held in both languages.

A report to standardise Welsh place names will be prepared following work undertaken in partnership with the Welsh Language Commissioner, to ensure a standard list of place name spellings for the county borough.

### **Action 8**

Ensure the council's website is bilingual and pages are monitored and updated in both languages on a rolling programme basis

### **Progress**

Measures are in place to ensure that any content for the website is bilingual and no information is published without translation. It should be noted that there are very rare occasions where, due to the urgent nature of a communication, the English will be published first whilst awaiting translation, but these situations are infrequent. Consultations and newsletters are produced bilingually and published on the Council's website.



## **Action 9**

Ensure the council's Intranet has a Welsh interface and menus in line with Standard 126

### **Progress**

The new Digital Workspace (new intranet) will be fully bilingual – specification has been signed off and about to go to tender. Ongoing conversations with Communications Unit. Expected to be launch in October 2023.

Welsh speaking members of Housing staff are nominated when a customer asks to converse in Welsh.

## **Action 10**

Create a campaign to attract young Welsh speaking citizens into youth work, sport and art activities as leaders

### **Progress**

This is an action in the five Year Welsh Language Strategy. It requires partnership working.

## **Action 11**

Work with young people to raise awareness of the Welsh language as a valuable skill for training and employment

### **Progress**

Over the past 2 years we have been working closely with Careers Wales to build links with our secondary schools, raising awareness of careers with the council but in particular how important having Welsh language skills is in the workplace.

Presentations were made to Year 10 and 11 across both sites of Ysgol Gyfun Cwm Rhymni regarding the importance of Welsh language skills in the workplace, and explain how the language is used as a part of daily work. All these sessions consisted of delivering a number of presentations to pupils promoting career and apprenticeship opportunities within the Council, with the students using their chrome books to search the Council's website for current job opportunities.

The presentation focussed in particular on how important and valuable having and using Welsh language skills are in the workplace. Students were encouraged to wear the 'iaith gwaith' orange speech bubble badges and lanyards to show employers and members of the public that they can speak Welsh.

In February, a presentation was delivered to key stage 4 students at Lewis Girls' School on the use of the Welsh language in everyday life, with a focus on the language as a skill in the workplace. A focus was also put on how the language belongs to everyone, no matter what their ability is in the language and the importance of taking pride in the language and making an effort to learn and use it where possible.

## **Action 12**

Hold an annual Welsh language jobs fair to raise awareness of the value of the language to employment in the Welsh public sector and the ability to contact the council in Welsh by telephone, face to face and by written communication

## **Progress**

See response to Action 11. We are slowly moving towards forming a Welsh language jobs fair, but that requires collaboration to materialise and building stronger links with schools and young people.

## **Equality Objective 6 - Inclusive, Diverse and Equal Workforce - Create a workforce which reflects and respects the diversity of the communities within the county borough**

Creating a workplace, which is safe and inclusive, promotes a positive working environment where staff feel valued and empowered, enabling them to provide high quality services to our citizens.

We need a greater understanding of the diversity of our workforce. To achieve this, collection of equalities monitoring data is crucial. Data must be captured at the beginning of the employment process, cleansed, and updated on a regular basis.

Fairness at work and good job performance go hand in hand. Tackling discrimination helps to attract, motivate and retain staff and enhances an organisation's reputation as an inclusive employer.

Equalities and Welsh language training equips staff with the skills and understanding required to engage with citizens sensitively. Upskilling staff to have an awareness of protected characteristics ensures that citizens with specific needs, receive services that are accessible and compliant.

The Council's HR system has been upgraded so that it can record language skills of staff and be able to pull reports should they be required.

### **Action 1**

Develop online equalities training which will be mandatory for all staff and elected members

### **Progress**

The enhanced provision of equalities training courses for staff and managers is one of the actions identified within the Workforce Development Strategy 2021–2024, with a timescale of Q3 2021-2022. Work is ongoing to achieve this target. The Workforce Development Team will be coordinating this work.

The Council actively promotes training to all staff to complete, including online training opportunities.

### **Action 2**

Implement the National Training Framework on violence against women, domestic abuse and sexual violence (VAWDASV).

- % of workforce who have completed Basic Awareness training (Group 1) / No of staff completed Basic Awareness training (Group 1)
- % of identified staff who have completed Ask and Act training (Group 2)
- % of identified staff who have completed Enhanced Training (Group 3)
- Implement Refresher training when available and appropriate

## **Progress**

4846 staff members have completed Basic Awareness training (Group 1) (62.46%).

76 staff completed this training in 2022/2023.

2 staff members were trained on the Train the Trainers WWA course for group 2 "Ask and Act" and have completed and passed the accreditation work.

156 professionals have been reached through group 2 "Ask and Act" awareness training.

2 staff members were trained on the Train the Trainers WWA course for group 3 "Ask and Act" Champions Training and have completed and passed the accreditation work.

9 professionals have been reached through group 3 "Ask and Act" Champions training?

41 elected members have completed Enhanced Training (Group 3). The TSG decided in June 2022 that they would run Elected Member awareness sessions aligned to the 2022 elections. They ran these sessions between January-April 2023.

All delivery of this training across this last year has been via the NHS E-Learning website for Group 1 and online and regionally delivered for Groups 2 and 3. For Groups 2 and 3, this approach has worked well for us and monitoring of attendance at these sessions has been clear. Group 1 training which is accessible via the NHS E Learning website has not worked so well for us this year but we are investigating why this is and how we can monitor and maximise attendance through our internal processes. Maximising attendance for Group 1 training is a priority for us over the next 12 months.

## **Action 3**

Disability Confident – improve on our current standard

## **Progress**

This year, we have received confirmation of our position Level 2 Registration as a Disability Confident employer for another three years and we will work collaboratively with our Trade Union partners to improve on our current standard.

Working collaboratively with our Trade Union colleagues, we continue to raise awareness of all forms of discrimination and the requirement to effectively challenge prejudice at source.

## **Action 4**

Ensure compliance with the *Equality Act 2010 (Statutory Duties)(Wales) Regulations 2011* and encourage disclosure:

- the publishing of pay differences by protected characteristic groups,
- the annual publication of our employment data, and
- work linked to improve staff disclosure rates of employment data, either through recruitment or via iTrent Self-Service

## Progress

We are currently working with our Digital Services Team to redesign and enhance our equalities reporting now that we have purchased enhanced modules in the HR / Payroll system.

The modules will not only provide us with the opportunity to improve our equalities reporting on a real time basis, but aligned to our revised recruitment processes will provide us with more opportunities to encourage and improve staff and applicant disclosure rates.

## Action 5

Re-establish our membership to support Stonewall's Workplace Diversity Champions Index

## Progress

Re-establishing our membership of Stonewall Cymru is one of the actions within the Employee Wellbeing Strategy 2021–2024. No progress has been made.

## Action 6

Work collaboratively to build the brand 'Proud Councils' to support Pride events

## Progress

Caerphilly Council is an active member of the Proud Councils partnership, which brings together several councils in South Wales in a visible and unified way, to support and promote equality for LGBTQ+ communities.

The purpose of Proud Councils is to improve support offered to LGBTQ+ staff within local authorities in Wales and ensure that local government across Wales is a visible leader in the field of LGBTQ+ rights and actively championing LGBTQ+ inclusion in our communities.

In 2022, 'Proud Councils' reached the finalists shortlist in the PinkNews Awards 2022, for the Public Sector Equality Award.

*"Representation in the public sector is paramount to creating a better future for minorities. That's why the Public Sector Equality Award celebrates those exceptional parts of our country's governmental or other public bodies that are making a change for the better."* - [PinkNews Awards nominees 2022: Full list \(thepinknews.com\)](https://www.thepinknews.com/pinknews-awards-nominees-2022/)

Although Proud Councils did not win the award, it was a proud moment to have been nominated and to reach the finalists shortlist.

Proud Councils worked on a number of promotional campaigns during 2022-2023 such as LGBT History Month and Pride Month. They also supported local community run Pride events namely Swansea, Abergavenny and Pride in the Port.

Caerphilly Council members also supported local LGBTQ+ activities through leading school assemblies at Ysgol Gyfun Cwm Rhymni and Lewis School Pengam. They also supported the Pride of Pengam pride event.

See Section Equalities Promotion Work and News stories from page 17



### Action 7

Ensure appropriate Welsh language training is available to staff, from basic to advanced levels

### Progress

The Engineering service area have recently developed and implemented a new frontline staff newsletter so can use this to promote training opportunities including Welsh Language etc.

Caerphilly CBC has provided conversational Welsh courses for staff and elected members since 2001. Courses are also accessible to members of the public and staff members from partner organisations to attend. The courses range from basic taster courses for beginners to courses, which cater for those who are now fluent Welsh speakers. During the initial lockdown, all courses moved to being held online; this in turn has led to the majority of lessons continuing to be held online, with a small number of staff attending lessons in person.

The data for the Welsh courses offered and attended by Caerphilly CBC staff for the academic year 2022-2023 is as follows:

COURSE OFFERED	NUMBER OF STAFF ATTENDING
Taster Courses	6
Entry Level Year Courses	31
Foundation Level Year Courses	8
Intermediate Level Year Courses	7
Advanced Level Year Courses	2
Proficiency Courses	7
Withdrawn	5

Caerphilly Council is proud to support staff in a wide range of Welsh language courses via the Learn Welsh website. Courses include year-long courses, lasting between 30 and 32 weeks; online courses, 10 hour self-study modules; summer and residential schools; and taster and supplementary courses, each ranging from Entry Level to Proficiency level.

### Caerphilly Staff Figures – 2018-2023

Academic Year	Year courses	Taster and Supplementary Courses	Total Number of Learners	(Numbers withdrawn)
2018 – 2019	53	91	144	(6)
2019 – 2020	62	185	223	(0)
2020 – 2021	27	219	246	(2)
2021 – 2022	35	-	35	(1)
2022 – 2023	50	11	61*	(5)
<b>TOTALS</b>	<b>322</b>	<b>581</b>	<b>879</b>	<b>(21)</b>

\*Some members of staff completed more than one course.

The number of staff learning Welsh increased during this financial year to 61. This coincides with us changing the way staff are offered courses and the process for registering on a course. It is now a much more streamlined process which has helped reduce our administration time.

Working closely with the National Learn Welsh centre, staff can start a Welsh course at any point during the academic year, and as noted above courses vary in delivery style and location. Some staff have even followed intensive week long courses at Nant Gwrtheyrn on the Llŷn Peninsula.

To further encourage staff to attend courses, we set-up a 'Clwb Clebran' (chat club) for Welsh learners and speakers, to come together and to create a welcoming environment for staff to use their Welsh language skills. The network of people will support each other in the workplace, and help develop Welsh language skills for the workplace.

During 2022-2023, staff were given 2 opportunities to attend a Welsh Language Awareness course, which attracted 19 attendees across the two sessions, up from 10 attendees from the previous year's two sessions. This course must be provided for staff in line with Standard 132;

*You must provide training courses so that your employees can develop –*

*(a) awareness of the Welsh language (including awareness of its history and its role in Welsh culture);*

*(b) an understanding of the duty to operate in accordance with the Welsh language standards;*

*(c) an understanding of how the Welsh language can be used in the workplace.*

The Welsh Language Awareness courses can be very effective in changing attitudes and explore the following points:

1. Why do we need to give attention to the Welsh language?
2. What do we need to know about the language and its speakers?
3. How can we act in a way that facilitates the use of the Welsh language?

Staff who attended the sessions gave very positive feedback, a comment from which is below:

“The session was very informative with great interaction. I didn't attend the course looking to learn Welsh but came away inspired and motivated to start learning again. I was expecting some information about meeting the Welsh Language Standards but know where to find this now. Thank you and great trainer.”

In accordance with Standard 128, the council must provide training to staff through the medium of Welsh in the following areas:

You must provide training in Welsh in the following areas, if you provide such training in English –

- (a) recruitment and interviewing;
- (b) performance management;
- (c) complaints and disciplinary procedures;
- (ch) induction;
- (d) dealing with the public; and
- (dd) health and safety.

No requests from staff were received for any of the above listed courses to be delivered through the medium of Welsh, therefore there are no staff training figures recorded. The above information is published here to provide continuity with previous reports.

Staff who attended the sessions gave very positive feedback and a selection of the feedback is below:

- The session was very information with great interaction.
- I didn't attend the course looking to learn Welsh but come away inspired and motivated *to start learning again*.
- I was expecting some information about meeting the Welsh Language Standards but know where to find this now. Thank you and great trainer.

## **Action 8**

Provide opportunities for staff to improve their existing Welsh language skills for business use

## **Progress**

There are a number of courses available for staff to improve their Welsh language skills along with the promotion of activities run by Menter Iaith Caerffili and Welsh Language Forum partners of events and activities Welsh speakers and learners of all levels can attend and put their skills to use, regardless of level of standard.

Here is feedback from one member of staff who was progressing from Entry Level 1 to Entry Level 2:

I have really enjoyed the Mynediad 1 Welsh language course that I have been taking this year. I have found the course to be an excellent refresher from my school days, and it has been instrumental in continuing my interest in learning Welsh.



I have been impressed with the structure of the course, the units are well-organised and easy to follow, and the activities and exercises have been helpful in reinforcing my learning. I am keen to continue learning Welsh, and I am confident that I will be able to build on the foundation that I have laid in this course. I am grateful for the opportunity to have learned from such an excellent resource, and I look forward to continuing my studies in the future.

All staff in Early Years are encouraged to take up conversational Welsh courses as well as the opportunity to do Mynediad or Sylfaen. Staff are encouraged to use their Welsh in the workplace especially in childcare and in Canolfan Blant Integredig Parc y Felin. With the increasing availability and diversity of courses, staff are more encouraged to access the courses and are being supported by various Welsh speaking members of the team.

Opportunities given to staff to improve Welsh language skills.

## **Action 9**

Provide opportunities for Welsh speaking staff and learners to use their language skills in the workplace

## **Progress**

In line with the Welsh Language Standards, staff are given opportunities to use their Welsh Language skills in the workplace. This includes answering the telephone, producing bilingual social media posts, or drafting bilingual correspondence. Staff are aware that all services the Council provides must be provided bilingually, and are supported by the Equalities and Welsh Language Team who provide advice, support and resources.

Table showing the number of Welsh speakers working for the Council in 2022-2023:

<b>Total Staff</b>	<b>Welsh Speakers</b>	<b>%</b>
8,535	2,100	24.60

Welsh speaking members of staff are nominated when a customer asks to converse in Welsh.

## **Equality Objective 7 - Reducing the Gender Pay Gap**

We are required to look at gender pay differences within the council and identify an objective that will address any identified difference.

Under the Equality Act 2010 (Statutory Duties Wales) Regulations 2011, the Council is required to collect and publish annual employment data across a number of protected characteristics. Information regarding the number of people employed by the council, arranged by, job, pay, contract type and working pattern, should only be broken down in relation to women and men. In addition, the Council must publish data on pay differences and their causes, between employees with and without protected characteristics.

As a Council, we are confident that our gender pay gap does not stem from paying male and female employees differently for the same or equivalent work. The gender pay gap is the result of roles in which male and females currently work and the salaries that these roles attract.

Our gender pay gap is reflective of the causes of gender pay gap at a societal level. For example, research has identified that, although parents are increasingly flexible, the responsibility of childcare still falls disproportionately upon women. It is a fact within this data that females hold the vast majority of part time posts and that these are the posts that attract salaries in the lower quartiles. To view the Council's Gender Pay Gap Statement 2021 click [here](#).

### **Action 1**

Review the data relating to the workforce and determine actions required to meet the general duty as laid down in the Equality Act 2010 (Statutory Duties (Wales) Regulations 2011

### **Progress**

Gender pay gap reporting will continue with 2023 data due to be published in March 2024.

Encouraging disclosure and increasing disclosure of staff with protected characteristics (Objective 6, Point 4) will enable us to provide more meaningful data aligned to meeting the general duty as laid down in the Equality Act 2010 (Statutory Duties (Wales) Regulations 2011.

### **Action 2**

Publish employment information as required by the Equality Act 2010 (Statutory Duties)(Wales) Regulations 2011

### **Progress**

We continue to publish information as required by the Equality Act 2010. We are committed to refining and increasing our reporting aligned to the investment in the upgraded HR / Payroll system.

### **Action 3**

Use the *My Time* appraisal process to develop female staff

#### **Progress**

My Time/My Time Extra is embedded across the organisation and is being used by Services across the Council to develop female staff.

Female staff are developed internally to progress to principal and senior engineer levels.

### **Action 4**

Raise awareness of job and business opportunities to non-traditional groups (i.e. not stereotyping jobs to gender)

#### **Progress**

Supported by additional funding agreed Cabinet, we have recently recruited officers to a dedicated Recruitment Team in People Services.

Underpinned by service planning, online recruitment, targeted recruitment, social media sourcing, tailored recruitment solutions, hybrid recruitment and effective networking continue to be used to recruit the right individuals with the right skills and capabilities to deliver the Council's goals.

Apprenticeship programmes, Career pathways, working with Kickstart Wales and with Schools, Colleges and Universities enable the Council to raise awareness of job opportunities and encourage applicants from non-traditional groups.

Encouragingly Engineering job adverts regularly attract female applicants.

### **Action 5**

Review and update HR policies regularly to include matters such as flexible working, part-time or job-share options, shared parental leave etc.

#### **Progress**

Our Agile Working Policy, Annual Leave Policy, Flexi Scheme and Mileage Scheme were all reviewed and supported by Council to become effective in January 2023. These support equity and encourage flexibility. A review of the Council's Leave of Absence Procedure and underpinning family friendly policies is currently in progress.