

EXECUTIVE

Date: Tuesday 3 February 2026

Time: 5.30 pm

Venue: Rennes Room, Civic Centre, Paris Street, Exeter

Members are invited to attend the above meeting to consider the items of business.

If you have an enquiry regarding any items on this agenda, please contact Mark Devin, Democratic Services Officer - democratic.services@exeter.gov.uk

Entry to the Civic Centre can be gained through the Customer Service Centre, Paris Street.

Membership -

Councillors Bialyk (Chair), Wright (Deputy Chair), Asvachin, Foale, Patrick, Vizard, Williams, R and Wood

Agenda

Part I: Items suggested for discussion with the press and public present

1 **Apologies**

To receive apologies for absence from Committee members.

2 **Minutes**

To approve and sign the minutes of the meeting held on 16 December 2025.

(Pages 5 -
14)

3 **Declarations of Interest**

Councillors are reminded of the need to declare any disclosable pecuniary interests that relate to business on the agenda and which have not already been included in the register of interests, before any discussion takes place on the item. Unless the interest is sensitive, you must also disclose the nature of the interest. In accordance with the Council's Code of Conduct, you must then leave the room and must not participate in any further discussion of the item.

Councillors requiring clarification should seek the advice of the Monitoring Officer prior to the day of the meeting.

4 **Local Government Act 1972 - Exclusion of Press and Public**

It is considered that the Committee would be unlikely to exclude the press and public during consideration of any of the items on the agenda, but if it should wish to do so, the following resolution should be passed:-

RECOMMENDED that, under Section 100A(4) of the Local Government Act 1972, the press and public be excluded from the meeting for the consideration of the particular item(s) on the grounds that it (they) involve(s) the likely disclosure of exempt information as defined in the relevant paragraphs of Part 1, Schedule

12A of the Act.

5 Questions from the Public Under Standing order No. 19

To receive questions relating to items on the Agenda from members of the public and responses thereto.

Details of questions should be notified to the Democratic Services Manager by 10.00am at least three working days prior to the meeting. Further information about speaking at a committee can be found here: [Speaking at a Committee](#)

6 Matters referred by Scrutiny Committees

To consider recommendations made to the Executive from Scrutiny Committees. (Pages 15 - 16)

7 Exeter Plan: Process for authorising proposed changes resulting from the Examination

To consider the report of the Strategic Director for Place. (Pages 17 - 20)

8 General Fund Estimates and Capital Programme 2026/27

To consider the report of the Strategic Director for Corporate Resources. (Pages 21 - 74)

9 HRA Estimates and Capital Programme 2026/27

To consider the report of the Strategic Director for Corporate Resources. (Pages 75 - 96)

10 Capital Strategy 2026-27

To consider the report of the Strategic Director for Corporate Resources. (Pages 97 - 106)

11 Treasury Management Strategy Report 2026/27

To consider the report of the Strategic Director for Corporate Resources. (Pages 107 - 126)

12 The Prudential Code for Capital Finance in Local Authorities (Incorporating the Annual Statement of Minimum Revenue Provision)

To consider the report of the Strategic Director for Corporate Resources. (Pages 127 - 144)

13 Local Council Tax Support Scheme 2026/27

To consider the report of the Strategic Director for Corporate Resources. (Pages 145 - 148)

14 Consultation and Engagement Strategy

To consider the report of the Strategic Director for People and Communities. (Pages 149 - 234)

15 Amendment to Grants Panel Terms of Reference - Ukrainian Community Grants

To consider the report of the Strategic Director for People and Communities. (Pages 235 - 246)

16 Temporary Accommodation Allocations Policy

To consider the report of the Strategic Director for People and Communities. (Pages

Date of Next Meeting

The next scheduled meeting of the Executive will be held on **Tuesday 17 March 2026** at 5.30 pm in the Civic Centre.

A statement of the executive decisions taken at this meeting will be produced and published on the Council website as soon as reasonably practicable.

Find out more about Exeter City Council services by looking at our web site <http://www.exeter.gov.uk>. This will give you the dates of all future Committee meetings and tell you how you can ask a question at a Scrutiny Committee meeting. Alternatively, contact Democratic Services at democratic.services@exeter.gov.uk

Individual reports on this agenda can be produced in large print on request to Democratic Services democratic.services@exeter.gov.uk

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EXECUTIVE

Tuesday 16 December 2025

Present:
Councillor Bialyk (Chair)
Councillors Asvachin, Foale, Patrick, Vizard, Williams, R and Wood

Apologies:
Councillor Wright

Also present:
Chief Executive, Strategic Director for Place, Head of Legal and Democratic Services & Monitoring Officer, Head of Service - Finance, Interim Head of Service - Housing, Collections & Content Manager and Democratic Services Officer

88

MINUTES

The minutes of the meeting held on 4 November 2025, were taken as read, approved and signed by the Chair as correct, subject to the following amendment:

- Minute No. 81 – replace the word Carter’s Court with Carder’s Court.

The minutes of the special meeting held on 26 November 2025, were taken as read, approved and signed by the Chair as a correct record.

89

DECLARATIONS OF INTEREST

No declarations of disclosable pecuniary interests were made.

90

QUESTIONS FROM THE PUBLIC UNDER STANDING ORDER NO. 19

No questions from members of the public were received.

91

MATTERS REFERRED BY SCRUTINY COMMITTEES

There were no matters referred from the Scrutiny Committees for this meeting.

92

2026/27 BUDGET STRATEGY AND MEDIUM-TERM FINANCIAL PLAN

The Executive received the report which provided a strategic overview of the budgetary position for the 2026/27 financial year and beyond which included the likely level of available resources, the known demand for resources and the proposals to ensure that a balanced budget could be achieved. It was noted the Council was required to set a balanced budget and Council Tax prior to the start of the financial year.

Particular reference was made to:

- the report was being presented early due to there being no January Executive meeting and the report was prepared before the final central government finance settlement was received;
- the report reflected the current estimates of the Fair Funding review and was the first multi-year settlement in over a decade;

- the report set out the assumptions for the current estimates for the next financial year, which included inflation and interest rates;
- external consultants had been used for forecasting the Fair Funding review and business rate resets;
- the government was using a new national formula to assess how much income the Council could raise from council tax and the report outlined expected changes to council tax capacity, business rates retention, and formula grants;
- the overall financial outlook was more positive, with a balanced budget achievable without difficult decisions and over £1 million of budget reductions had been identified, mainly from aligning budgets with actual income and spending;
- the largest saving would be £645,000 from reduced gas and electricity costs; and
- budget proposals would be given to Members at a briefing in January 2026 once the settlement was confirmed and the final budget would be presented to Council for approval in February 2026.

During the discussion, Executive Members raised the following points and questions:

- the positive budget outlook was welcomed and officers were thanked for identifying major savings;
- the council was praised for its long term long-term prudence and leadership for the current financial position and avoiding major service cuts;
- the upcoming government finance settlement, fair funding review, and multi-year settlement was welcomed;
- the budget would provide a positive impact, especially given Exeter's historically low council tax and it was a more positive year-end than in recent years;
- clarification was sought on inflation assumptions in the budget table, including gas at 0%, motor fuel, and insurance increases;
- the positive savings relating to the City Management Portfolio were highlighted and the £100,000 additional income from recycling sales was commended, and residents were thanked for their participation;
- the £100,000 savings on fleet hire costs and £30,000 reduction in fuel costs were praised, which supported reduced carbon emissions;
- officer leadership and assurances on budget management was commended; and
- it was enquired whether the Fair Funding Review would close the funding gap for Devon authorities or whether the area was likely to remain low-funded compared to other councils despite the reforms?

In response to questions raised by Executive Members, the Head of Service Finance advised that:

- the 5 - 18% insurance increase reflected the different uplifts across various insurance policies and insurance inflation was based on an insurers' assessment of risk profiles and wider market conditions, not just council-specific factors;
- policies likely to be affected included public liability and motor fleets; and
- the intention of the fair funding review was on creating a consistent and fair national funding formula for all districts. Council Tax equalisation was a key mechanism for reducing funding imbalances between authorities.

Opposition group leaders made the following points and questions:

- clarification was sought on the £2.1 million funding gap in the Medium Term Financial Strategy and whether the gap applied across the full three-year period or mainly in the first year?
- clarification on committee expenditure was sought, which appeared much higher in the current year compared to future years;
- further explanation of the revenue figures was sought;
- appendix 2 of the report identified £1 million in proposed income generation or savings, but the budget highlighted an additional £500,000 being carried forward from previous budget decisions and further clarification was sought; and
- public communications suggested that there would be no cuts required and clarity on the budget position was sought.

In response to questions raised by opposition Members, the Head of Service Finance advised that:

- the funding gap table covered multiple years because it reflected the required three year period of Medium Term Financial Plan;
- savings taken in one year were recurring and become part of the base budget;
- the peak in committee expenditure in 2025–26 reflected the approved supplementary budgets, which were typically one off, and as such reduced in later years;
- the £590,000 of prior-year savings included £500,000 from the digitalisation programme and £90,000 from additional income at the Matford Centre.

The Head of Service Finance advised that the term ‘committee expenditure’ was largely historic terminology and agreed that a more accurate description would be ‘net service expenditure’ which would be used in future years.

The Leader moved the recommendations, which were seconded by Councillor Foale, voted upon, and CARRIED unanimously.

RECOMMENDED that Council note the contents of the report and approve the proposals to establish a balanced Revenue Budget and Capital Programme.

93

COUNCIL TAXBASE AND NNDR 1 2026/27

The Executive received the statutory report which set the 2026/27 Council Tax base in accordance with the Local Authorities (Calculation of Tax Base) (England) Regulations 2012. The report also sought approval to delegate the Council’s estimate of Business Rate Income (NNDR1) for the next financial year to Strategic Director Corporate Resources and S151 Officer.

Particular reference was made to:

- the Government referendum principles remain unchanged and therefore with the Council tax increases remaining below £5 or 3% there would be no referendum trigger;
- the budget strategy had assumed a 2.99% council tax increase, which was consistent with recent years and there was a modest increase in Band D equivalent properties compared to the current year;
- 334 additional Band D equivalent properties would be subject to council tax;
- recommendation 2.3 of the report requested delegating authority be granted to the Section 151 Officer to complete and submit the annual business rates

return by the end of January 2026, which calculated the forecast income for 2026–27; and

- a collection fund surplus of just over £1 million was being proposed, which was a statutory, ring-fenced account for council tax and business rates and any surplus or deficit would be declared by the billing authority and shared with precepting bodies in the following financial year.

During the discussion, Executive Members raised the following points and questions:

- it was highlighted that Exeter City Council only received 8% of the total council tax collected, with the majority of it going to other agencies;
- the council tax collection rate of 97.5%, was 0.2% above the national average and officers were commended for their effective collection performance;
- clarification was sought on the tax base of £40,186 against 59,000 households and whether the difference represented households from which council tax was not collected; and
- an enquiry was made about the council tax banding review process for properties that had undergone significant changes and whether there was a set process to capture those changes and if they affected future council tax income projections?

In response to questions raised by Executive Members, the Head of Service Finance advised that:

- the difference between total households and the tax base was due to adjustments for properties where council tax could not be collected. Those adjustments mainly reflected the Council Tax Support Scheme, which reduced the effective tax base; and
- inspection officers did visit properties undergoing major changes, but a more detailed response would be provided to Members outside of the meeting.

The Head of Service Finance, advised that recommendation 2.1 needed to be amended to reference the correct regulations as follows:

- the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012.

The Leader agreed for the amendment to be accepted.

The Leader moved the recommendations as amended, which were seconded by Councillor Foale, voted upon, and CARRIED unanimously.

RESOLVED that Executive approve:

- (1) that in accordance with the Local Authorities (Calculation of Council Tax Base) (England) Regulations 2012, the amount calculated by Exeter City Council as its tax base for the year 2026/27 will be £40,186;
- (2) the Collection Fund Surplus of £1,060,596; and
- (3) that the Section 151 Officer be granted delegated responsibility to approve the Council's NNDR1 return by 31 January 2026.

The Executive received the report which set out the proposed changes to Council dwelling rents, garage rents and service charges with effect from 1 April 2026.

Particular reference was made to:

- the rent increases followed the Government's social rent setting policy with rises to CPI + 1%, which took September 2025 CPI inconsideration and equated to 4.8%;
- the Service charges and garage rents were outside the scope of the social rent setting policy but were proposed to rise by 4.8% for consistency;
- the government had indicated its intention to implement a convergence policy, to allow rents currently below formula levels to be increased annually, so tenants in similar properties within the same area pay comparable rents; and
- delegated powers were sought to implement the convergence policy once government guidance was issued.

During the discussion, Executive Members raised the following points and questions:

- would the reinstatement of the Winter Fuel Allowance affect the outcomes under the cost of living/energy on page 56 of report?
- £15,192,519 had been spent on capital works, £11,293,222 spent on revenue works and 152 homes were retrofitted which highlighted the service charge increases and how it funded those essential works;
- winter fuel allowance was in place for residents earning under £35,000 a year or were born before 1959, which would also impact calculations;
- it was enquired whether data and the impact of retrofitting could be included in future reports as a positive element mitigating cost-of-living pressures;
- the proposed service charge increase was modest compared to private/leasehold management fees and reflected value for money in HRA services; and
- the relevance of the race and ethnicity section in the EQIA was raised and clarification was sought on how it related to the questions asked.

The Leader acknowledged that any rent increase would be unpopular but emphasised the context that Exeter's social rents remained lower than housing associations and was still significantly below private rental market rates. He further clarified that Winter Fuel Allowance was paid upfront and adjusted through income tax coding over the year.

In response to questions raised by Executive Members, the Head of Service Finance advised that:

- service charges complied with government guidelines and were limited to cost recovery only. They could not exceed the actual cost of providing the services and were regularly reviewed to ensure they reflect the true cost of delivery; and
- other questions raised by the Executive Members will need to be responded to outside of the meeting.

Opposition group leaders made the following points and questions:

- it would be positive for tenants that the rent increase this year was lower due to lower CPI;
- clarification was sought on the 15% increase in the use of Council bailiffs between 2022–23 and 2024–25 and whether it primarily related to Council housing arrears or general council debts;

- there was a need to monitor impacts of rent levels on tenants, including access to benefits support;
- council housing was the only affordable housing option in the city;
- following recent national discussions on housing issues, it was highlighted that Exeter City Council was ahead in this discussion;
- clarification was sought on the migration from housing benefit to Universal Credit and whether this migration posed any issues, and at what stage the council might need to intervene or implement a policy; and
- it was noted that Universal Credit payments went directly to recipients, unlike housing benefit, which would affect the council's ability to manage income directly.

The Leader acknowledged questions from opposition group leaders and advised that those issues did not affect the upcoming vote on the report and that detailed answers would be provided outside of the meeting.

The Leader moved the recommendations, which were seconded by Councillor Foale, voted upon, and CARRIED unanimously.

RESOLVED that the Executive approves:

- (1) the increase of Council dwellings rent by 4.8% from 1 April 2026;
- (2) the increase of Garage rents by 4.8% from 1 April 2026;
- (3) the increase of Service Charges by 4.8% from 1 April 2026; and
- (4) in principle, an additional increase in rents for non-convergent properties to bring them into line with convergent rents over a period of time, with the precise level of any such additional increase be delegated to the Strategic Director for Corporate Resources and the Strategic Director for People and Communities, in consultation with the Leader and the relevant Portfolio Holder.

95

RAMM COLLECTIONS DEVELOPMENT POLICY (2026-30)

The Executive received the report to approve a new Collections Development Policy for the Royal Albert Memorial Museum & Art Gallery (RAMM) to cover the years 2026 to 2030. Members noted that the Collections Development Policy required Council approval as a requirement of Museum Accreditation, which was a UK standard to enable museums to apply for major investment from Arts Council England and other funding bodies.

Particular reference was made to:

- the policy, together with the forward plan for the RAMM, formed key components of Arts Council accreditation;
- the policy was comprehensive and set out how the museum acquired and managed its collections as well as the circumstances under which individual items may be disposed of;
- the RAMM held over 1 million objects, but only 1% were on display at any time, highlighting extensive behind the scenes work;
- collections dated back to around the 1860s, with some items of outstanding historical and cultural importance; and
- the policy also highlighted the RAMM as a unique and valuable resource for the city and future generations.

During the discussion, Executive Members raised the following points and questions:

- the strong focus on acquiring materials and artefacts from Devon and the local area and emphasis on ethical standards in collection management was commended;
- it was enquired whether disposal processes involved both sales and gifting and if income from disposals were anticipated;
- the RAMM was a regionally significant museum and custodian of national and international history and culture and the responsible approach to collection care and acquisitions was praised;
- having clearly defined criteria for what the RAMM would not collect was also important;
- the inclusion of a formal repatriation policy was an important and sensitive area; and
- the intentions to acquire items reflecting Exeter's multi-faith society and LGBTQ+ community was commended.

The Portfolio Holder for Arts, Culture & Tourism endorsed the policy and commended the detailed work in identifying the rationale and disposal opportunities across 10 broad categories. He also highlighted the importance of legal and ethical frameworks.

In response to questions raised, the Collections & Content Manager advised that the first preference for disposal was to transfer to another public organisation and any selling of objects being a last resort. Any funds from sales were reinvested into the museum and disposal was not intended to generate financial benefit for the organisation.

The Leader moved the recommendations, which were seconded by Councillor Foale, voted upon, and CARRIED unanimously.

RECOMMENDED that Council approve the Royal Albert Memorial Museum Collections Development Policy 2026-30.

96

RAMM FORWARD PLAN (2026-29)

The Executive received the report which required Council approval for the Royal Albert Memorial Museum & Art Gallery (RAMM) Forward Plan to cover the years 2026 to 2029. An approved Forward Plan was also a requirement of Museum Accreditation, for museums and galleries.

Particular reference was made to:

- the forward plan set the future direction for the RAMM and highlighted its importance locally, regionally, and beyond;
- the plan had been developed collaboratively by the RAMM team and set out vision, objectives, outcomes, and delivery methods;
- the plan would be reviewed over a three year review cycle and updated as circumstances change;
- the RAMM had an average annual attendance of 200,000 visitors and contributed £6.8 million to the local economy, whilst it engaged with communities for education, learning, and well-being; and
- the forward plan captured both the strategic policy and the broader societal impact of the RAMM to the area.

The Portfolio Holder for Arts, Culture & Tourism highlighted that approval was required to secure Arts Council funding and that the plan was adaptable and expected to evolve over time. It highlighted five key areas and included strategies to

reduce RAMM's dependence on council funding. The Portfolio Holder for Arts, Culture & Tourism endorsed the recommendation for approval.

An opposition group leader raised concerns about the recent thefts at the RAMM and in Bristol and noted that the report did not identify security and theft as a risk. Analyses of security measures were requested for the collection, both on-site and in storage. The opposition group leader advised that she had submitted the question in advance of the meeting to the Portfolio Holder.

The Portfolio Holder for Arts, Culture & Tourism confirmed he had received a copy of the questions the day preceding the meeting and that he had responded to advise that a comprehensive answer would be provided.

The Leader acknowledged the response and highlighted that the questions did not impact the recommendations being voted on and requested the Portfolio Holder for Arts, Culture & Tourism to respond outside of the meeting.

The Leader moved the recommendations, which were seconded by Councillor Foale, voted upon, and CARRIED unanimously.

RECOMMENDED that Council approve the Forward Plan for the Royal Memorial Museum and Art Gallery for the period 2026 to 2029.

97

EXETER CITY COUNCIL HOUSING SERVICES HATE CRIME POLICY

The Executive received the report on the revised Housing Services Hate Crime Policy 2026-2031 for adoption and implementation. The policy would operate in conjunction with the Housing Anti-Social Behaviour Policy to address hate crimes and hate incidents within Council housing communities.

Particular reference was made to:

- the Hate Crime Policy was initially presented to Executive on 23 September 2025 for recommendation to Council, however, Members had expressed concerns about the quality of the Equality Impact Assessment and the decision was made to defer the item to enable a more thorough review;
- since the September meeting, the EQIA had been updated and had significant changes had been made;
- the policy provided guidance for managing hate crime reports within council homes and estates and focussed on a victim focused approach as well as the Council's zero tolerance stance on hate crimes;
- the policy defined hate crimes and hate incidents, staff responsibilities, reporting, and recording as well as the importance of supporting victims and witnesses; and
- the policy definitions also aligned with the Police and Crown Prosecution Service (CPS) standards.

During the discussion, Executive Members raised the following points and questions:-

- the policy was commended both previously and currently and the clear definitions and updated EQIA were seen as important improvements;
- the policy was a valuable addition to the council's housing policies; and
- the updated EQIA was commended for its clarity and thoroughness and had been supported by the Council Housing and Development Advisory Board and Tenants groups.

The Leader moved the recommendations, which were seconded by Councillor Foale, voted upon, and CARRIED unanimously.

RECOMMENDED that Council approve the adoption of the new Hate Crime Policy for the period 2026-2031.

(The meeting commenced at 5.30 pm and closed at 6.33 pm)

Chair

The decisions indicated will normally come into force 5 working days after publication of the Statement of Decisions unless called in by a Scrutiny Committee. Where the matter in question is urgent, the decision will come into force immediately. Decisions regarding the policy framework or corporate objectives or otherwise outside the remit of the Executive will be considered by Council on 13 January 2026.

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Recommendations from Scrutiny Committees to the Executive Committee.

From the Strategic Scrutiny Committee meeting held on – 15 January 2025

Minute No. 33 – Unauthorised Encampments

From the Strategic Scrutiny Committee:

- a) Ask officers to note the evidence given today both written and verbal, from the community and organisations and members to inform work on the protocol going forward.
- b) Review the definition of an unauthorised encampment in protocol
- c) Recommend to the Executive, to explore the viability and impact of a Negotiated Stopping Policy.

RECOMMENDED that the Executive Committee explore the viability and impact of a Negotiated Stopping Policy.

From the Customer Focus Scrutiny Committee meeting held on – 22 January 2025

Minute No. 100 – Medium Term Financial Plan

From the Customer Focus Scrutiny Committee - to recommend that:

- (1) That a peppercorn rent continues for Citizens Advice Exeter
- (2) More resource is directed to the Parks and Green Spaces Team
- (3) The Climate Action Plan is strengthened by adding an Adaptation and Resilience plan
- (4) Support is strengthened for community asset transfer.

RECOMMENDED that the Executive Committee consider that:

- (1) that a peppercorn rent continues for Citizens Advice Exeter;
- (2) more resource is directed to the Parks and Green Spaces Team;
- (3) the Climate Action Plan is strengthened by adding an Adaptation and Resilience plan; and
- (4) support is strengthened for community asset transfer.

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REPORT TO EXECUTIVE

Date of Meeting: 3 February 2026

REPORT TO COUNCIL

Date of Meeting: 3 March 2026

Report of: Ian Collinson: Strategic Director for Place

Title: The Exeter Plan – Process for agreeing proposed modifications at Examination

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 The Exeter Plan has been submitted to the Planning Inspectorate for its Examination which will take place in March and May 2026. The Examination will test the Plan's legal compliance and soundness. On this basis, the Inspectors will propose modifications to the Plan to ensure it is sound and can be taken forward towards adoption. Officers are required to have formal authorisation delegated to them in order to discuss and agree proposed modifications to the Plan at the Examination. This authorisation needs to be provided by Council. Modifications will be brought back to Executive in advance of public consultation. The final plan will be considered for adoption by Council.

2. Recommendations:

2.1 That the Executive notes the latest progress made on the Exeter Plan; and

2.2 That the Executive recommends to Council that delegated authority is provided to the Strategic Director for Place, in consultation with the Portfolio Holder for City Development, to authorise proposed modifications which may emerge during the Exeter Plan Examination necessary for the Plan to be considered sound.

3. Reasons for the recommendation:

3.1 To ensure that the necessary authorisation processes are in place in advance of the Exeter Plan Examination hearings to ensure the efficient progress of the Exeter Plan through its examination. The recommended process is the product of recent legal advice.

4. What are the resource implications including non-financial resources:

4.1 None. The recommendations are procedural only.

5. Section 151 Officer comments:

5.1 There are no additional financial implications for Council to consider.

6. What are the legal aspects?

6.1 The Exeter Plan is being prepared under the Planning and Compulsory Purchase Act 2004 (the 2004 Act). Section 20 Part 5 of the 2004 Act states that the purpose of Examination is to determine whether the Plan has been prepared in accordance with relevant processes, whether it is sound (defined as positively prepared, justified, effective and consistent with national policy as per the National Planning Policy Framework) and whether it complies with the duty to cooperate with a series of prescribed bodies.

6.2 As is standard practice, a series of proposed modifications will emerge from the Examination as required by the Planning Inspectors in accordance with Section 20 part 7 of the 2004 Act. Although these proposed modifications will be brought back to the Executive in full for approval for consultation after the Examination hearings, it is necessary for delegated authority to be in place to propose and/or agree modifications as they emerge during the Examination process.

7. Monitoring Officer's comments:

7.1 The Monitoring Officer has no additional comments.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal no potential impact has been identified on people with protected characteristics as determined by the Act because the report is procedural and for information only. The Publication Regulation 19 version of the Exeter Plan was subject to EQIA in November 2024.

9. Carbon Footprint (Environmental) Implications:

9.1 There are no direct carbon/environmental impacts arising from the recommendations because they are procedural and for information only. The Exeter Plan includes a series of policies which specifically address climate change mitigation and adaptation and challenges associated with the natural environment. The Exeter Plan has been subject to a full Sustainability Appraisal. Any future proposed modifications which emerge from the Examination of the Plan will be subject to Sustainability Appraisal following the Examination.

10. Report details:

Exeter Plan latest progress

10.1 The Exeter Plan was submitted to the Planning Inspectorate for its Examination in September 2025. In January, the programme and matters, issues and questions for the Examination were provided by the Planning Inspectorate. Further information is available here [INS-07: Inspectors' Hearing Programme - v1](#) and here [INS-06: Inspectors' Matters Issues Questions - v1](#).

10.2 The Local Plans team is now working towards the Examination hearings by preparing a series of hearing statements which provide answers to the questions raised by the Inspectors. The questions effectively provide the agenda and the structure for the discussions at the hearings. As with all Local Plans there are a large number of questions

and these are asked to assist the Inspectors with concluding on the soundness of the Plan.

Modifications to the Exeter Plan at Examination

10.3 The National Planning Policy Framework includes a small number of tests of soundness. These tests are that the Plan is:

- Positively prepared;
- Justified;
- Effective; and
- Consistent with national policy.

10.4 The Plan also has to be legally compliant – for example that it has been prepared in accordance with the duty to cooperate with prescribed bodies (such as other Councils).

10.5 As a result of the breadth of local plans, their statutory status, the interest in their content from third parties and the need to be in accordance with the tests of soundness, Inspectors invariably propose a series of modifications which are required to make the plan sound. These proposed modifications emerge from the discussions at the Examination hearings. Local Planning Authorities have to expressly ask the Planning Inspectorate to propose modifications required to make a plan sound and this was done through the letter which accompanied the submission of the Exeter Plan and which is available here [csd-01_exeter-plan-submission-letter-to-planning-inspectorate.pdf](#).

10.6 To front-load some of the Examination discussion, a series of potential modifications which could be made to address representations made by third parties has been submitted alongside the plan. These are available online here https://exeter.gov.uk/media/cx1nhqx2/csd-03_exeter-plan-schedule-of-suggested-modifications.pdf. Because these are not proposed by the Inspectors, these are only informal.

Process for making modifications at Examination

10.7 Following the submission of the Exeter Plan, we have received legal advice that it would be prudent for officers to have specific delegated authority, in consultation with the Portfolio Holder for City Development, to agree proposed modifications which emerge from the Planning Inspectors at Examination. This delegated authority would be to the Strategic Director for Place. Having this delegation established in advance of the hearings should make them run more smoothly. In practical terms, it is likely that the Strategic Director for Place, Head of City Development and Assistant Service Lead – Local Plans will meet with the Portfolio Holder for City Development at the end of each of the four weeks of hearing sessions to discuss the emerging proposed modifications.

10.8 Notwithstanding this authorisation process, once drafted, the proposed modifications to the Exeter Plan will need to be subject to various assessments such as Sustainability Appraisal (as has already taken place with the existing version of the plan) and public consultation. The Executive will be asked to approve this consultation following the hearings, later in 2026. Subsequently, the Council will receive a report from the Inspectors concluding on the soundness of the Plan. Ultimately, the final version of the Plan, incorporating the modifications, will be taken to Council for adoption.

For enquiries please contact: democratic.services@exeter.gov.uk

10.9 On this basis, it should be noted that approval is not sought for specific modifications at this stage.

Next steps in securing delegated authority

10.10 Contingent on the discussion and decision made at the Executive meeting on 3 February, the report will be taken to Council for consideration on 3 March.

11. How does the decision contribute to the Council's Corporate Plan?

11.1 The recommendations are procedural and for information and so will contribute to a 'well run Council' in terms of achieving efficient progress towards the Exeter Plan – a key Council project. Owing to its statutory nature and breadth of policy coverage, the Plan will support the delivery of all four strategic priorities of the Council:

- Local economy;
- Homes;
- People; and
- Sustainable environment.

12. What risks are there and how can they be reduced?

12.1 There is minimal risk associated with the recommendations; establishing a delegated officer process for agreeing proposed changes (which will be consulted on in future) has been identified by legal advice as being a requirement which will smooth the continued progress of the Exeter Plan through the Examination process to ensure that the final plan is ultimately considered 'sound' prior to adoption. The proposed changes themselves will be brought back to Executive at a later date for approval to consult. The final version of the Plan will be brought to Council for adoption in future.

13. Are there any other options?

13.1 There are two other options:

- Attend the Exeter Plan Examination without any established approval process in place to discuss and agree proposed modifications. This is not appropriate because it runs the risk of delaying the Examination and future progress of the Exeter Plan following the hearings.
- Arrange for the Portfolio Holder for City Development to attend all Examination sessions to agree Plan modifications. This is not considered proportionate nor reasonable.

Strategic Director for Place, Ian Collinson

Author: George Marshall: Assistant Service Lead – Local Plans

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

Exeter Plan: Publication version: Regulation 19

REPORT TO EXECUTIVE

Date of Meeting: 3 February 2026

REPORT TO COUNCIL

Date of Meeting: 24 February 2026

Report of: Strategic Director of Corporate Resources

Title: General Fund Estimates and Capital Programme 2026/27

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 To propose the General Fund revenue estimates for 2026/27 and to recommend the Band D level of Council Tax for 2026/27. This report also includes the proposed Capital Programme for 2026/27 and future years.

2. Recommendations:

It is recommended that:

2.1 The Council's overall revenue spending proposals in respect of its General Fund are recommended to Council for approval.

2.2 The Council's General Fund Capital Programme is recommended for approval.

2.3 Members consider the budget assessment by the Section 151 Officer in Section 11 in agreeing the recommendations.

2.4 The General Fund minimum Balance be set at £3.010 million for 2026/27.

2.5 The Council Tax for each Band be recommended to the Council as set out in section 12 subject to Devon County Council, OPCC Devon and Cornwall and the Devon and Somerset Fire Authority confirming their Band D levels respectively; and

2.6 The Council's Flexible Use of Capital Receipts Strategy is recommended for approval, as set out in Appendix 10.

It is recommended that Executive approve that:

2.7 When the actual Council Tax amounts for Devon County Council, Devon and Cornwall Police and Crime Commissioner and the Devon and Somerset Fire Authority are set then the revised council tax levels be submitted to Council on 24 February 2026 for approval.

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3. Reasons for the recommendation:

3.1 To ensure that the Council can set a balanced budget and determine the Council Tax for the City of Exeter in line with the statutory timeframe.

4. What are the resource implications including non-financial resources?

4.1 Section 8, 9 and 11 of the report sets out the resource implications of the proposed budgets.

5. Section 151 Officer comments:

5.1 The Government has concluded the review of Local Government funding, reset the Business Rates and delivered the first multi-year financial settlement in a decade. Whilst as expected the reset of Business Rates removed a significant amount of funding from the Council, changes to the formula and the introduction of a Funding Floor Grant to ensure that the Council receives the same amount as it did in 2025/26 meant that the anticipated reductions of £3.5m were no longer required.

5.2 It is important for Members to recognise that after taking inflation into account, this settlement provides less funding in real terms over the three-year period. The Council will receive the same amount in 2028/29 as it did in 2025/26 and that assumes that Council Tax is increased by its maximum each year.

5.3 However given that the Council was preparing for significant reductions, overall, the settlement has allowed a balanced budget to be set using previously approved reductions and some straightforward budget adjustments that do not impact on service provision.

5.4 The balanced budget will be deliverable over the life of the three-year settlement. This is based on a number of caveats. The budget and Medium Term Financial Plan (MTFP) is based on a number of assumptions. Any changes to actual inflation, interest rates etc. will have an impact on the position. The budget is based on the existing activity of the Council and any additions will require budget reductions as in previous years.

5.5 The Capital programme remains constrained by high interest rates. Whilst the existing programmes impacts are built into the MTFP any further projects will have an impact on the revenue budget.

5.6 For the first time, a flexible use of capital receipts strategy is being proposed. This is required to allow the Council to apply to Government to use capital receipts to cover expenditure that would normally be revenue. It has been used in many Councils previously as a way of balancing the budget, but Exeter is only seeking approval to cover the transitional costs associated with Local Government Reorganisation. The Council has no need to use capital receipts for its ordinary business, but as set out in the bid to Government they will be essential to supporting the costs of LGR. At present the Council has £1.5m of capital receipts which when added to the proposed, one-off revenue budget of £500,000 will give a budget of £2m which should be sufficient for this year's required expenditure.

6. What are the legal aspects?

6.1 As part of the budget and the Council Tax fixing process, the Council is required by the Local Government Finance Act 1992 to make various specific calculations and decisions:-

- (a) it must calculate its budget requirement in accordance with Section 32 of the Act;
- (b) it must calculate the City Council element of the Council Tax - first for Band D and then for all bands - in accordance with Sections 33 to 36;
- (c) it must set the overall Council Tax for each band in accordance with Section 30.

7. Monitoring Officer's comments:

7.1 Legislation does not prescribe how much the minimum level of reserves should be. The Section 151 officer is tasked with recommending the minimum level of reserves required as part of the budget setting process having regard to elements of risk in the Council's finances. Section 25 of the Local Government Act 2003 requires the S.151 officer to report on the adequacy of the Council's financial resource.

7.2 The Monitoring Officers' comments are intended to assist all members of the Council in consideration of the complex legal background to their budgetary and Council Tax decisions and to set out the legal factors and requirements which Members of the City Council need to consider in reaching decisions on the budget and Council Tax.

7.3 In coming to a decision in relation to the revenue budget and the council tax, the City Council and Councillors have the following legal duties:

- a) To act in accordance with their statutory duties and responsibilities;
- b) To act reasonably; and
- c) To have careful regard to their fiduciary duty to its rate payers and Council taxpayers.

7.4 The City Council has a clear legal duty to set a balanced budget. A resolution not to set a Council tax would be unlawful so would be a resolution to set a Council tax which deliberately did not balance the budget.

7.5 When deciding, councillors are reminded of the obligation to act reasonably and in accordance with the principals set down in the Wednesbury case. This means that councillors are required to consider all relevant considerations and ignore any irrelevant considerations. Put simply, it would be unlawful for the Council to come to a view which is unreasonable in the sense that it is so irrational that no reasonable authority could have reached it.

7.6 The meaning of fiduciary duty is more difficult to define but can be summarised as a duty to conduct administration in a business-like manner with reasonable care, skill and caution and with due regards to the council's rate payers. When discharging their fiduciary duties councillors will need to consider the following:

- a) Prudent use of the council's resources, including the raising of income and the control of expenditure;
- b) Financial prudence both long and short term;

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- c) Striking a fair balance between the interest of the council tax payers on the one hand and the community interest and adequate and efficient services on the other hand; and
- d) Acting in good faith with a view to complying with statutory duties and exercising its statutory powers for the benefit of the community.

7.7 The S.151 officer has given very clear advice in paragraphs 5 above. Members are obliged to have regard advice to this advice when making decisions about the Council's finances

7.8 Restriction on voting:

Members' attention is drawn to the provisions of S.106 of the Local Government Finance Act 1992 which applies to members where:

- (a) They are present at a meeting of full Council, the Executive or Committee and at the time of the meeting an amount of Council tax and has remained unpaid for at least 2 months; and
- (b) Any budget or Council tax calculation or recommendation or decision which might affect the making of any such calculation, is the subject of consideration at the meeting.

7.9 In these circumstances, any such members shall at the meeting and as soon as practical after its commencement disclose the fact that S.106 applies to them and shall not vote on any question concerning budget setting.

7.10 Failure to comply with these requirements is a criminal offence unless such member can prove that they did not know S.106 applied to them at the time of the meeting or that the matter in question was the subject of consideration at that meeting.

8. Report details:

8.1 Local Government Provisional Finance Settlement 2026-27

8.1.1 3 year Settlement

On 17 December 2025, the Ministry for Housing, Communities and Local Government published the provisional 2026/27 local government finance settlement. The local government finance settlement is the annual determination of funding to local government, referred to Core Spending Power.

Core Spending Power is the measure of resources available to local authorities to fund service delivery, comprising funding from the Settlement Funding Assessment, council tax and centrally funded grants. Appendix 1 sets out the Core Spending Power for each of the Devon authorities for 2026/27.

The Government consulted on significant reforms to how funding from central government is allocated between English councils, referred to as the 'Fair Funding Review 2.0'. From 2026-27, there will be a new system for allocating funding. The new funding distribution is subject to transitional arrangements and is being introduced gradually over the period of the three-year settlement, from 2026/27 to 2028/29. This is the first multi-year settlement in a decade.

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8.2 Business Rates

8.2.1 As part of the 'Fair Funding Review 2.0' the Government have re-set the Baseline Funding Level for retained business rates.

The Business Rates Retention System (BRRS) was introduced in 2023-14. Under the BRRS, each authority was assigned a Baseline Funding Level which determined how much of its relative funding need was to be met through retained business rates income. This was then compared to a measure of their individual ability to raise business rates. Where a local authority raised more in business rates than their assessed level of need – they were required to pay a tariff. Conversely, if an authority's business rates income was below their assessed level of need – they received a top-up.

The BRRS was designed to be periodically re-set, to ensure that the distribution of resource is realigned with need. It has been over a decade since the BRRS was introduced without a re-set. This has meant that many local authorities, including Exeter, have grown their business rates income in excess of their Business Rates Baseline and have benefited from retaining business rate growth. For Exeter, this equates to a loss of circa £4m, but due to transitional arrangements the authority will have a phased reduction down to the new Baseline Funding Level over 3 years, so the loss is smoothed.

As a result of the business rates re-set there is greater risk and little potential benefit to being part of a pooling arrangement and therefore the Devon authorities have agreed to revoke the pool for 2026/27.

8.3 Council Tax

8.3.1 The new funding allocation system includes an assessment of how much councils can raise via council tax, based on modelled revenues if their tax rates was equal to the average rate across all councils.

The review is intended to achieve 'full equalisation' of revenue-raising capacity, to ensure councils receive the same share of overall funding that they are assessed to need, if they were to set their council tax level to the national average. For Exeter, this equates to gain of circa £3m, due to its low council tax levels.

In terms of Council Tax increases, the Government have maintained core referendum principles as they were in 2025-26 over the multi-year Settlement, with a council tax referendum principle of up to 3% or £5 increase for District Councils. This is in line with the medium-term financial plan. As a result, Exeter's budget strategy for next year assumes that council tax will increase by 2.99%, which, along with the estimated surplus on the collection fund of £82,783 and increase in the taxbase will raise an extra £264,260.

The Government have also consulted on modernising and improving the administration of council tax, this includes proposals to spread council tax payments over 12 monthly instalments by default, rather than the current default 10 monthly instalments.

8.4 New Homes Bonus

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8.4.1 The Government has now confirmed that the New Homes Bonus will come to an end after 2025-26, with funding absorbed into the core local government finance settlement from 2026-27 onwards. This reflects the move away from specific grants towards a broader assessment of local authority need and resources.

8.5 Recovery Grant

8.5.1 The Recovery Grant continues across the multi-year Settlement at 2025-26 levels. The Recovery grant targeted funding towards areas with greater need and demand for services and equates to £271k p.a. for Exeter.

8.6 Extended Producer Responsibility

8.6.1 2026/27 will be the second year of the Extended Producer Responsibility for Packaging. These payments are excluded from Core Spending Power. The scheme works by charging fees to businesses that use packaging to meet the costs of collecting and recycling it and to encourage businesses to reduce the amount of packaging they use, shift to more recyclable materials and design new products that can be recycled and reused more easily.

8.7 Grants Simplification

8.7.1 On 18 December, the day following the provisional settlement, MHCLG published allocations of the four new consolidated grants.

As part of the 'Fair Funding Review 2.0' the Government consolidated several grants to simplify the local government funding landscape. In the current funding system, local authorities receive millions of pounds from grants outside the Settlement. They are often uncertain, announced after local authorities have set their budgets, and have associated burdensome conditions and reporting requirements.

For Exeter, the key changes are that funding for:

- Homelessness, rough sleeping and domestic abuse grants have been become part of core spending power and will be ring-fenced (£2.677m 26/27)
- Discretionary Housing Payments form part of Crisis and Resilient Fund allocations and will continue at 2025-26 levels in Years 1 and 2 and will be ring-fenced (£0.156m)

8.8 Transitional Arrangements

Transitional funding, including a minimum funding floor, to protect councils from the full impact of the funding changes. There will be a 3-year transition to new funding allocations.

8.9 Local Government Reorganisation

The provisional settlement sets out multi-year allocations based on existing councils. These allocations are to set the 'funding envelope' for the new local authorities created through reorganisation.

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Where new unitary authorities mean existing authorities are split the Government states it is for local authorities to agree how to divide funding. The Government will provide guidance for local authorities on how to arrive at local agreements and a timeline for when these agreements should be reached. If areas are unable to reach agreement the MHCLG Secretary of State will make a determination on the share of the settlement allocations to new authorities.

8.10 Key Assumptions

8.10.1 An overall allowance of £0.971m has been set aside for inflation. The inflationary increases allowed in the budget are:

Pay Award	2.5%
Pay – Increments	0.5%
Electricity	4.0%
Gas	0.0%
Water	3.5%
Insurance	5.0% - 18.0%
Rates	3.6%
Motor Fuel	0.0%
General Inflation	3.6%
Income (excluding Car Parks)	3.0%

8.10.2 A thorough review of all budgeted costs and income has been performed to help ensure adequate provision is made for inflation and where allowance has been made for a general inflationary increase, it has been provided for at 3.6% in-line with August 2025 CPI. Pay has been increased by 2.5% although there is a risk that this again may be lower than the actual amount agreed.

8.10.3 Interest is based on the existing loans that have been taken out and the amounts available for investment. Future borrowing requirements are based on rates of around 3.5% and the Council will seek to internally finance borrowing until rates stabilise from the present highs of around 5.8%.

8.11 Equality Impact Assessment

8.11.1 Equality Impact Assessments (EQIA) form part of the Council's decision-making process and are a tool to help the Council identify what effect or possible effects its work may have on different groups of people. All local authorities have a legal responsibility to assess their policies and functions, and to set out how they will monitor any possible negative impact on equality target groups.

8.11.2 An EQIA assessment has been undertaken for each of the 2026/27 budget proposals.

8.12 Latest Medium Term Revenue Plan (Appendix 2)

8.12.1 The latest Medium Term Financial Plan (MTFP) is set out in Appendix 2. The MTFP indicates that a balanced budget can be achieved within requiring any further savings required, with proposals of £2.081m already identified, as set out in Appendix 3.

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8.12.2 There are further uncertainties and factors that could affect the future financial position. These include potential costs arising from the Local Government Reorganisation, the annual pay award and additional borrowing and revenue costs in respect of any new capital programme commitments.

8.13 Balances and Reserves

8.13.1 The Council's current policy is that the minimum level of the General Fund Balance will remain above £3.100 million with a slight reduction to £3.010 million from 2026/27. As the Council is reliant on less secure forms of income such as car park and commercial rent income it is prudent to hold reserve levels at this level to offset sudden losses of income or unexpected expenditure. Section 11 below provides an assessment of the risk factors used to underpin the minimum level of reserves.

8.13.2 At the Quarter 2 stage of 2025/26 financial year, it was forecast that the Council's General Fund Balance would dip below the minimum level to £2.925 million. The latest estimated position of the General Fund Balance is that it will return to £3.267 million as at 31 March 2026, equivalent to 13.4% of Exeter's net revenue budget. The Council's latest medium-term financial plan (Appendix 1) indicates that the General Fund Balance will stand at to £3.350 million by the end of 2028/29, if the proposed reductions are delivered. This is in line with the minimum level required.

8.13.3 The Council also has other reserves that have been earmarked for specific purposes. The Council's proposed revenue budget for 2026/27 includes a net transfer to earmarked reserves of £0.261 million. This is broken down as follows:

Transfer to/(from) reserves:

	2026/27
	£'000
Transfers to Reserves	
Devon Home Choice	26
Surplus Income from Guildhall Shopping Centre (ring-fenced)	500
Sub total	526
Transfers from Reserves	
Governance Review	(53)
Household Support Admin	(82)
Well-being Exeter	(118)
Asset Improvement Maintenance	(200)
Leisure VAT refund	(215)
Net Zero Exeter	(119)
Sub total	(787)
Net Transfer to/(from)	(261)

8.13.4 Additionally, there is an earmarked reserve to control the impact of additional reliefs granted, and funded, by Government in respect of Business Rates. To provide consistency in the figures reported, these movements are shown in Business Rates

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income to allow Councillors to compare the impact on the Council's Business Rates funding to previous years.

8.14 Revenue Estimates 2026/27

8.14.1 Subject to the reductions being agreed, Service Committee Expenditure for 2026/27 is £19,484,43, an increase of £3,314,190 compared to 2025/26.

8.14.2 Once agreed by Council, Appendix 3 sets out the proposed reductions and additional income that will be reflected in the published budget book.

8.14.3 Once agreed by Council. Appendix 4 sets out the proposed budget increases to reflect unavoidable cost pressures or already committed from previous years and new revenue bids.

8.14.4 In addition, there are other items to consider, referred to as 'below the line' as they do not form part of the individual service controllable budgets. These include an estimate of £1,300,000 for net interest payments in respect of investments and borrowing, £3,084,000 towards repaying debt in respect of the Council's capital programme and transfers in respect of balances and reserves. The Council's total General Fund Expenditure budget requirement for 2026/27 is proposed at £23,948,160, an increase of £2,048,010 compared to 2025/26 as shown in Appendix 5.

8.14.5 Attached at Appendix 6 is a breakdown of the movements for each management unit taking out the amounts that have been removed or added, but that don't actually impact on the Council Tax. This is either because they have been transferred to / from another part of the budget or because there is a statutory override, which means that the costs are removed elsewhere in the budget.

8.15 Council Tax Budget Requirement 2026/27 (Appendix 7)

8.15.1 As stated above, the Government is setting the referendum trigger for District Councils at above £5 or 3%, whichever is higher. The budget has been set based on a 2.99% increase, although this is ultimately a Member decision. A 2.99% increase generates around £22,102 more for the Council than an increase of £5.

8.15.2 When all the Government Grant and Business Rates funding is taken into account the resultant net expenditure to be financed from council tax is £7,770,860 (indicated in Appendix 4), an increase of £264,070 compared to 2025/26.

8.15.3 Each year the Council must estimate the likely surplus or deficit position on its Collection Fund and any such amounts must be taken into account when determining the band D Council Tax amount. For next year, it is estimated that the collection fund will have a surplus of £82,783 (Exeter's share), which will be used to fund part of the expenditure to be financed from Council Tax.

8.15.4 After taking into account the surplus and the taxbase of 40,186, the proposed band D council tax for 2026/27 is £191.31, which means that the council tax would increase annually by £5.55 or 2.99%.

9 General Fund Capital Programme Resources (Appendix 8)

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9.1 Historically, the annual capital programme was financed from Government allocated grants together with money from the Council's own capital receipts and capital reserves. However, the funding from these sources has now reduced and as a result the Council has to use borrowing instead to fund a significant part of its proposed capital programme. This also has an ongoing impact on the Council's revenue budget, as borrowing incurs interest costs and repayment of debt (through a minimum revenue provision). The Council must ensure that any borrowing decisions remain affordable and to this end, has to adopt a number of prudential indicators, which are set out in the Prudential Code for Capital Finance in Local Authorities developed by CIPFA. A separate report to this meeting of the Executive sets out the Council's Prudential Indicators for approval by Members. Section 9.3.2 below sets out the current position, that without a robust, positive financial business case, the Council cannot afford to borrow any further than is already planned in the MTFP at this time.

9.2 The following capital resources are available for the General Fund (£17.769m) in 2026/27. The Capital Programme totals £27.513 million in respect of the General Fund. The borrowing requirement for the General Fund is £13.118 million. Appendix 8 sets out the forecast use of the resources available for the General Fund and the likely amounts of borrowing that will be necessary to fund the capital programme in the future.

9.3 General Fund Capital Programme (Appendix 9)

9.3.1 The proposed capital programme is set out in Appendix 9. The programme for 2026/27 totals £27.513 million. Other than £1.184 million for Digital and Data projects in accordance with the Strata Business Plan, there are no new schemes being requested at this stage. The rest of the programme consists of schemes approved in 2025/26 or before, that have already been deferred to 2026/27 at the earliest. It is anticipated that the programme will increase substantially at year end when further schemes from the 2025/26 capital programme are deferred into the new year.

9.3.2 As Members are aware, the costs of borrowing are prohibitive and the additional costs will simply require greater reductions in service provision, potentially in-year. The Council is therefore seeking to minimise any external borrowing until such time as interest rates reduce.

9.4 Flexible Use of Capital Receipts (Appendix 10)

9.4.1 Given the significant transitional costs of Local Government Reorganisation, it is proposed that the Council holds its capital receipts to fund these costs, rather than capital expenditure. Local authorities are currently permitted to utilise capital receipts (excluding right to buy receipts) to fund the revenue costs of transformation projects.

To enable the Council to make use of the Flexible Use of Capital Receipts Direction, it must prepare and approve a Flexible Use of Capital Receipts Strategy, which is set out in Appendix 10 for 2026/27.

10. Consultation

10.1 The Council undertook a public consultation on priorities in relation to the Council's Corporate Plan to help inform the setting of the budgets for 2026/27 and future years, which ran from 19 November to 31 December 2025. The survey was available on the

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Council's website to enable a wide audience of residents, visitors, and businesses to have their say. It resulted in 58 responses received.

A summary of responses to the Budget Consultation are set out in Appendix 11.

11. Risk Assessment

11.1 It has already been mentioned above in this report that our financial forecasts are based on a number of assumptions including the level of inflation, interest rates, income levels, support from the government and general prevailing economic conditions. The main risks to the Council's financial position are as follows:

- Economic volatility, higher interest rates and inflation have added substantial costs to running services. Whilst price inflation has settled, it still exceeds the increase in the Council's available resources.
- To deliver the services the Council operates, it is overly reliant on less secure forms of income such as car park income to balance its budget. Indeed, the cost of providing our statutory functions with associated support services and legal liabilities is well over £20 million. The Council has experienced significant volatility in a number of its income budgets in the last 12 months. Whilst these have been addressed in the production of this budget, it does demonstrate the risk of reliance on less secure income streams.
- The Council has a range of statutory obligations, which do not form part of a standard district council and for which it therefore receives no funding from Government. These include responsibility for the River Exe and Canal, the Roman Wall a host of historic listed buildings and a number of bridges. These add significant pressure to the budget and require significant maintenance, which will add further pressure;
- Local government reorganisation (LGR) is remodelling local government across large parts of England, redrawing boundaries, merging institutions and reframing democratic representation. However, implementing reorganisation while establishing new strategic authorities represents significant challenges, including financial risks.

11.2 Although the Council faces risks from the assumptions and uncertainties outlined above these have been mitigated by the following:

- The first multi-year provisional local government finance settlement in a decade provides greater certainty for financial planning
- Adopting a prudent approach to financial forecasting which involves obtaining information from external professional sources;
- Continuous monitoring and review of the key factors together with regular reports to Members on any key issues;
- Regular budget monitoring meetings with budget managers to ensure that budget pressures are identified at the earliest opportunity;
- The adoption of robust financial management arrangements including option appraisal, risk assessment and financial monitoring;
- Long-term borrowing at fixed interest rates
- Rigorous and robust financial planning has been performed in relation to LGR to help ensure cost savings are realistic and that transitional costs are accounted for
- Retaining a prudent level of reserves and balances.

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11.3 As part of the general budget-setting process the Council needs to also consider the risks inherent in the budgets set and the adequacy of the measures put in place to manage the potential risks.

11.4 Section 25 Statement of The Robustness of Estimates and Adequacy of Reserves

There is a requirement under Section 25 of the Local Government Act 2003 that requires the chief finance officer of a local authority to formally report to its members on the robustness of the estimates and the adequacy of its reserves when it is considering its budget and council tax.

11.5 Robustness of Estimates

This report has outlined the key assumptions that have been made in the budget proposals for next year including an assessment of the risks and mitigating factors. To assess the robustness of the estimates, the following have been considered:

- The strength of the medium term financial planning process in operation including the identification of significant service pressures, both unavoidable and through policy decisions;
- The strength of the budget monitoring process in identifying weaknesses and pressures in the existing budgets;
- The use of an annual process of engagement with senior managers and members to test out the robustness of proposals;
- Finance staff providing advice throughout the process on robustness, including vacancy factors, increments, current demand, and income levels.

The Section 151 Officer for this Council therefore considers that the budget estimates for 2026/27 that have been prepared are both robust and achievable.

11.6 Adequacy of Reserves and Balances

The Council's current policy is that the minimum level of the General Fund Balance will be £3.100 million. This equates to 14.2% of the net revenue budget, which is at the top end of what would normally be expected.

11.7 General Fund Working Balance

The Council provides more Services than you would normally expect a District Council to provide. It also has some significant funding streams from fees and charges and historic commercial property leases that are fundamental to producing a balanced budget. These are reliant on a vibrant economy delivering the income required.

There are a range of risk factors that must be taken into account and the Section 151 Officer has taken a risk based approach to assessing the level of reserves required. The framework for assessing the risks surrounding the budget needs to consider the following:

- Inflationary pressures;
- Planned savings measures;
- Reliance on income from fees & charges;

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- Business Rates volatility;
- Insurance excesses;
- Risk of litigation (including Planning appeals);
- Volume variations on demand led services (e.g. Homelessness);
- Interest Rate variations.

Area of Risk	Explanation	Amount
Inflationary pressures	As set out above, the budget is based on a set of assumptions. In particular, the impact of the pay award is not known when budgets are set. As Local Government tries to stay ahead of the National Living Wage, pay awards have outstripped estimates over recent years. A 1% increase would add £330,000 to costs. Similarly, a 1% variation in inflation on premises, supplies, services & transport £270,000 to costs.	600,000
Planned savings	There is a risk that for a number of reasons some proposed savings will not be achieved or will be achieved later than planned. This is particularly true in respect of additional income targets. The Council has a good track record of delivering planned savings. A 10% reduction would add £160,000 to costs	160,000
Income from fees & charges	The Council is reliant on significant income from fees & charges and rental income to balance the budget. A 5% reduction would add £1.6 million to the budget	1,600,000
Business Rates volatility	The risk element in relation to business rates is minimised for 2026/27 due to the Government's guarantee to ensure that 100% of income is protected	0
Insurance excesses	The Council does not budget for insurance excesses. The property insurance excess is £100,000 each claim and therefore 2 claims in a year would potentially cost £200,000	200,000
Risk of litigation	Planning appeals are expensive. It can cost the Council around £100,000 to defend an appeal.	100,000
Volume variations	Volume variations can impact on the Council's budget in services which are demand led. A cushion is therefore held to protect the financial position.	150,000
Interest Rates	A 0.5% variation in interest rates would cost the Council £200,000	200,000
		3,010,000

It is therefore proposed to reduce minimum reserves to £3.010 million. The latest estimated position of the General Fund Balance is that it will be £3.267 million as at 31 March 2027, equivalent to 13.6% of Exeter's net revenue budget. The Council's revised medium-term financial plan (Appendix 2) indicates that the General Fund Balance will be £3.350 million by the end of 2028/29, if the proposed reductions are delivered.

11.8 The Council's estimated General Fund revenue reserves are as follows: -

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<u>Earmarked</u>	31/03/2026	31/03/2027	31/03/2028
	£'000	£'000	£'000
Total Earmarked Reserves*	7,774	7,513	7,545
<u>Non-Earmarked</u>			
General Fund Balance	2,925	3,267	3,560

* Excludes Business Rates earmarked reserve to cover the deficit on the Collection Fund.

12. Precepts

12.1 Devon County Council, the Office of the Police and Crime Commissioner Devon and Cornwall (OPCC Devon and Cornwall) and the Devon and Somerset Fire Authority will all precept separately upon the council taxpayers in Exeter. The County Council, Devon and Cornwall OPCC and Devon & Somerset Fire Authority will meet on the 19 February, 30 January and 16 February respectively. The precepts will be tabled at the Council meeting for approval.

	2025/26	2026/27	Change
	£	£	£ %
Devon County Council	1,801.26	x,xxx.xx	xx.xx x.xx
OPCC Devon and Cornwall	288.20	xxx.xx	xx.xx x.xx
Devon and Somerset Fire Authority	104.68	xx.xx	x.xx x.xx
Total Precept	2,194.14	x,xxx.xx	xx.xx x.xx

12.2 Final Position

12.2.1 Based upon the recommendations above the aggregate requirements of Exeter City Council, Devon County Council, OPCC Devon and Cornwall and the Devon and Somerset Fire Authority will result in a council tax for the City of Exeter for 2026/27 of £x,xxx.xx per Band D property.

12.2.2 This is an overall increase of £xxx.xx (x.xx%) on the amount of £2,379.90 levied for 2025/26.

12.2.3 The detailed figures are: -

For enquiries please contact: democratic.services@exeter.gov.uk

Band	Exeter £	DCC £	Police £	Fire £	Total £
A	127.54	xxx.xx	xxx.xx	xx.xx	x,xxx.xx
B	148.80	xxx.xx	xxx.xx	xx.xx	x,xxx.xx
C	170.05	x,xxx.xx	xxx.xx	xx.xx	x,xxx.xx
D	191.31	x,xxx.xx	xxx.xx	xx.xx	x,xxx.xx
E	233.82	x,xxx.xx	xxx.xx	xx.xx	x,xxx.xx
F	276.34	x,xxx.xx	xxx.xx	xxx.xx	x,xxx.xx
G	318.85	x,xxx.xx	xxx.xx	xxx.xx	x,xxx.xx
H	382.62	x,xxx.xx	xxx.xx	xxx.xx	x,xxx.xx

13. How does the decision contribute to the Council's Corporate Plan?

13.1 The budget underpins the Corporate Plan by determining the amount of funds available to the Council to deliver its priorities.

14. What risks are there and how can they be reduced?

14.1 The key risks are set out in section 11 above.

15. Equality Act 2010 (The Act)

15.1 Under the Act's Public Sector Equalities Duty, decision makers are required to consider the need to:

- eliminate discrimination, harassment, victimisation and any other prohibited conduct;
- advance equality by encouraging participation, removing disadvantage, taking account of disabilities and meeting people's needs; and
- foster good relations between people by tackling prejudice and promoting understanding.

15.2 In order to comply with the general duty authorities must assess the impact on equality of decisions, policies and practices. These duties do not prevent the authority from reducing services where necessary, but they offer a way of developing proposals that consider the impact on all members of the community.

15.3 In making decisions the authority must take into account the potential impact of that decision in relation to age, disability, race/ethnicity (includes Gypsies and Travellers), sex and gender, gender identity, religion and belief, sexual orientation, pregnant women and new and breastfeeding mothers, marriage and civil partnership status in coming to a decision.

15.4 Any proposals made that require an EQIA will need to address this prior to implementation.

For enquiries please contact: democratic.services@exeter.gov.uk

16. Carbon Footprint (Environmental) Implications:

16.1 The report allocates resources and therefore does not in itself have carbon footprint implications. The impact of the Council's overall carbon footprint is reported separately.

17. Are there any other options?

17.1 Not applicable.

Strategic Director for Corporate Resources, Dave Hodgson

Author: Strategic Director for Corporate Resources, Dave Hodgson

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

List of Appendices:

- Appendix 1 – Core Spending Power;
- Appendix 2 – MTFP
- Appendix 3 – Budget Reduction Proposals;
- Appendix 4 - Budget Pressure Proposals;
- Appendix 5 – GF Summary;
- Appendix 6 – Summary of Estimate Movements;
- Appendix 7 – Council Tax;
- Appendix 8 – GF Capital Financing;
- Appendix 9 – Capital Programme;
- Appendix 10 – Flexible Use of Capital Receipts Strategy 2026-27;
- Appendix 11 – Balanced Budget Consultation 26-27.

Core Spending Power - Devon Authorities

Authority	Revenue Support Grant £ million	Baseline Funding Level £ million	Better Care Grant £ million	Council Tax Requirement £ million	Homeless, rough Sleeping & Domestic Abuse £ million	Families First Partnership £ million	Transitional payments £ million	Recovery Grant £ million	Total Core Spending Power £ million
Devon	127.5	121.6	35.9	614.3	1.8	7.4	0.0	0	908.5
Plymouth	69.1	75.9	16.0	157.1	3.8	4.0	0.0	7.1	333.0
Torbay	42.6	36.5	10.9	102.7	1.9	1.9	0.0	7.9	204.4
East Devon	8.2	3.3	0.0	11.8	0.9	0.0	0.1	0.0	24.3
Exeter	7.8	5.5	0.0	7.7	2.7	0.0	0.3	0.2	24.2
Mid Devon	4.6	2.3	0.0	7.7	0.5	0.0	0.0	0.1	15.2
North Devon	6.0	3.2	0.0	8.6	1.0	0.0	0.0	0.3	19.1
South Hams	4.0	1.5	0.0	9.3	0.5	0.0	0.0	0.0	15.3
Teignbridge	6.2	3.3	0.0	10.9	0.8	0.0	0.0	0.0	21.2
Torridge	3.9	2.00	0.0	5.4	0.6	0.0	0.0	0.3	12.2
West Devon	2.1	1.6	0.0	6.3	0.2	0.0	0.0	0.1	10.3

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MEDIUM TERM REVENUE PLAN (2024/25 - 2028/29)

	2024/25 £'000	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000
Resources					
Revenue Support Grant	1,799	1,113	7,759	7,023	6,238
Business Rates Income	8,858	9,929	5,452	5,576	5,689
SFA	0	0	0	0	0
Recovery Grant	0	271	271	271	271
Funding Floor	0	0	277	659	1,217
CIL income	774	798	862	793	793
New Homes Bonus	486	872	0	0	0
Extended Producer Responsibility Fund (EPR)	0	1,410	1,557	1,557	1,557
Council Tax	7,170	7,507	7,771	8,006	8,338
Likely resources	19,087	21,900	23,949	23,885	24,103
Expenditure					
Service net expenditure	18,059	22,089	21,100	19,690	19,867
Net Interest	1,277	1,648	1,300	1,300	1,300
Repayment of debt	1,805	2,680	3,084	3,035	3,115
RCCO	115	406	0	0	0
	21,256	26,823	25,484	24,025	24,282
Other funding					
Contribution to/ (from) earmarked reserves	(1,592)	(2,543)	(261)	32	31
Contribution to/ (from) balances - Other	(577)	(2,380)	342	293	(210)
	(2,169)	(4,923)	81	325	(179)
Further reductions required		0	0	0	0
Potential reductions identified		0	(1,616)	(465)	0
Total Net Budget	19,087	21,900	23,949	23,885	24,103
Balanced Budget	0	0	0	0	0

Opening General Fund Balance	5,882	5,305	2,925	3,267	3,560
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Service	Proposal	2026/27 Revenue Estimate (income/cost reduction) (£)	2027/28 Revenue Estimate (income/cost reduction) (£)	EQIA Assessment	Description
Energy	Review of electricity & gas budgets	645,000	50,000	Financial review exercise and no impact on people	Budgets reduced to reflect Corporate Energy Manager projections in conjunction with review of spend patterns, schedules produced for breakdown by service cost centre
Various	Asset Maintenance Contracts Review of existing procurement arrangements across the various directorates in terms of asset maintenance contracts to provide BVM/Cost Savings i.e PPM, Auto doors, Asbestos etc		10,000	Change to a small number of contracts and unlikely to impact on people	Potential cost savings via consolidated contracts. Requires support from Procurement. Expected benefits from economies of scale
Parks & Green Spaces	Events	10,000		Financial review exercise and no impact on people	Increase budget income recognising annual over performance
Parks & Green Spaces	Rental Income	23,000		Financial review exercise and no impact on people	Increase budget income recognising annual budget over performance
Waste Operations	Recyclate income	100,000		Financial review exercise and no impact on people	Realign budget with historic sales
Fleet	Reduced fuel costs	30,000		Financial review exercise and no impact on people	Savings can be realised due to electric vehicles powered by solar farm
Fleet	Fleet hire costs	100,000		Contractual arrangement unlikely to have any impact on people	More vehicles migrated across to the fleet contract with SFS
Homecall	Homecall	5,000	5,000	EQIA completed in relation to the increase in customers to meet the target income increase, and associated comms campaign. A further EQIA will be developed later for the overall review of Homecall	Work with Devon LA's in collaborative working for ECC to run and manage their respective systems. Comms campaign to increase customer base across Exeter and the wider area. Review of Homecall with a report presented to SMB winter 2025.
Local Plans	Cut Local Plan Evidence Budget	33,000		Financial review exercise and no impact on people	In base budget but not required on a recurring basis
Culture	Cultural Redesign Phase 2	30,000		EQIA completed and appended to the report	This is in addition to the savings being made in 2025/6. Further details to be scoped.
Culture	RAMM Exhibition income	10,000		EQIA completed and appended to the report	This is charging for exhibition space currently not charged for.
Sales and Marketing	Increased income	40,000		Income target will be raised through employment of extra post. There is no impact on the current team so an EQIA is not required	The figure listed for 26/27 is based on current establishment capacity.
	IDENTIFIED DURING 26/27 BUDGET CYCLE	1,026,000	65,000		
Various	Digitalisation	500,000	400,000		Implement digitalisation - up to £1.2m over 3 years (£0.3m in Year 1)
Markets	Increased income	90,000			Increase budget income recognising annual budget over performance
	PREVIOUSLY AGREED	590,000	400,000		
TOTAL REDUCTIONS IDENTIFIED		1,616,000	465,000		

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Appendix 4

	2026/27 £000's	2027/28 £000's	2027/28 £000's
Unavoidable or Already Committed from Previous Years			
Living Wage	25	25	
Housing Benefit Admin grant reduction	60	60	
External valuations	(90)		
Pension backfunding		50	40
Business Rates revaluation	207		
Reinstate Arena budget	294		
Apprenticeship Levy	45		
Cemeteries Income	89		
Customer Support Team Leader - reinstate budget removed in error	52		
DBS Checks HR	5		
Strata - increase in budget contribution	100		
Homeless Prevention Grant	1,692		
Sub total	2,479	135	40
New Revenue Bids - Recurring			
Deletion of pay point 2 agreed as part of national pay award	12		
Members Allowances	3		
Revenues - contract for year end	7		
Community Safety	335		
CCTV - additional Night Staff	58		
Cash Collection	63		
Reduction in Commercial Property Income	632		
Reinstate Mace Seargants budget	18		
Commercial Assets restructure	27		
Civic Centre rental	335		
Sub total	1,490	0	0
New Revenue Bids - Non Recurring			
LGR - Preparation	500	(400)	(100)
Well-being Exeter (funded by earmarked reserves & CIL)	210	(210)	
Sub total	710	(610)	(100)
TOTAL	4,679	(475)	(60)

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Appendix 5

	2025/26 Budget £	2026/27 Budget £	Change £
Chief Executive	1,139,480	1,650,220	510,740
Operations	12,591,810	13,455,710	863,900
Corporate	(6,753,370)	(6,677,310)	76,060
People and Communities	6,401,250	8,645,310	2,244,060
Place	8,167,790	8,310,060	142,270
less Notional capital charges	(5,376,720)	(5,899,560)	(522,840)
Service Committee Net Expenditure	16,170,240	19,484,430	3,314,190
Net Interest	1,475,000	1,300,000	(175,000)
Revenue Contribution to Capital	88,760	0	(88,760)
Minimum Revenue Provision	2,702,000	3,084,000	382,000
General Fund Expenditure	20,436,000	23,868,430	3,432,430
Transfer To/(From) Working Balance	16,370	340,730	324,360
Transfer To/(From) Earmarked Reserves	1,447,780	(261,000)	(1,708,780)
General Fund Net Expenditure	21,900,150	23,948,160	2,048,010
Revenue Support Grant	(1,113,000)	(7,759,000)	(6,646,000)
Business Rates	(9,929,000)	(5,452,000)	4,477,000
Recovery Grant	(271,000)	(271,000)	0
Funding Floor	0	(277,000)	(277,000)
CIL income	(798,360)	(861,650)	(63,290)
Extended Producer Responsibility	(1,410,000)	(1,556,650)	(146,650)
New Homes Bonus	(872,000)	0	872,000
Council Tax	(7,506,790)	(7,770,860)	(264,070)
	0	0	0
Working Balance	March 2026 2,925,660	March 2027 3,266,390	

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	BASE ESTIMATE 2025/2026	INFLATION	NEW PROPOSALS RECURRING	NEW PROPOSALS NON- RECURRING	DEPRECIATION ADJUSTMENTS	OTHER ADJUSTMENTS	BUDGET TRANSFERS	NEW ESTIMATE 2026/27	EXPLANATION
Chief Executive									
83C7 ACTIVE & HEALTHY PEOPLE	0	8,930	0	0	0	(8,930)	0	0	No significant changes
86B7 STRATEGIC MANAGEMENT	1,139,480	38,240	0	500,000	0	(26,770)	(730)	1,650,220	New budget for local government review work
Net Cost	1,139,480	47,170	0	500,000	0	(35,700)	(730)	1,650,220	
Operations									
81A1 ENVIRONMENTAL HEALTH & LICENSING	922,670	37,790	0	0	(430)	(14,510)	(56,480)	889,040	Budget transfer to Human Resources to facilitate new Health & Safety roles
81A6 PARKS & GREEN SPACES	1,982,020	53,410	(40,160)	0	6,190	(94,490)	(6,960)	1,900,010	New proposals are due to increase in rent & events income plus small savings in utilities. There have been adjustments due to the reduction of superannuation costs and staffing budgets have been re-aligned across the Operations service
81B2 BEREAVEMENT SERVICES	120,550	2,520	81,870	0	(5,790)	25,860	(430)	224,580	A proposal to reduce cemetery income has been made, to reflect the move away from traditional burials to cremations.
81C3 AFFORDABLE HOUSING DEVELOPMENT	410	30	0	0	0	(70)	0	370	No significant changes
81C5 SUNDRY LANDS MAINTENANCE	115,670	0	0	0	0	4,160	0	119,830	No significant changes
81D2 DOMESTIC REFUSE COLLECTION	3,502,260	104,760	(130,000)	0	199,170	684,370	(540)	4,360,020	New proposals to reduce motor fuel & fleet hire cost budgets have been made. An adjustment to move income to 81D8 Materials Reclamation Facility was made to correctly align budget with actuals
81D4 STREET CLEANING	1,873,620	48,970	0	0	(37,560)	(3,000)	(1,130)	1,880,900	No significant changes
81D5 PUBLIC CONVENIENCES	234,920	6,200	(8,080)	0	(14,920)	1,200	(210)	219,110	No significant changes
81D6 WASTE CHARGEABLE SERVICES	(412,460)	20,900	0	0	(18,500)	99,200	0	(310,860)	Adjustments to realign staff budgets have resulted in movements between management units within the same service
81D7 WASTE STRATEGY AND FACILITIES	368,130	12,920	(4,840)	0	1,270	(1,410)	(2,040)	374,030	No significant changes
81D8 MATERIALS RECLAMATION FACILITY	988,380	23,620	(118,790)	0	(25,400)	(732,520)	(910)	134,380	New proposals include increaseing recycles materials sales and decreasing utilities budgets. Adjustments have been made to move income from 81D2 Domestic Refuse collection (see above) as well as a movement in salaries due to budget realignments
83B4 ENGINEERING SERVICES	748,230	17,340	(29,360)	0	24,610	(14,190)	(270)	746,360	No significant changes
83C1 WATERWAYS	407,690	12,390	(9,020)	0	13,660	(12,070)	(790)	411,860	No significant changes
83C5 CORPORATE PROPERTY - ASSETS	1,139,020	60,050	(420)	0	(520)	420,550	(1,200)	1,617,480	Since the re-structure part of the internal recharge now comes from the Corporate Property - Estates budget
86B5 CORPORATE SUPPORT	600,700	28,110	337,360	0	113,240	(190,810)	0	888,600	The Civic Centre rental income budget has been reduced to reflect vacant office space within the building.
Net Cost	12,591,810	429,010	78,560	0	255,020	172,270	(70,960)	13,455,710	

	BASE ESTIMATE 2025/2026	INFLATION	NEW PROPOSALS RECURRING	NEW PROPOSALS NON- RECURRING	DEPRECIATION ADJUSTMENTS	OTHER ADJUSTMENTS	BUDGET TRANSFERS	NEW ESTIMATE 2026/27	EXPLANATION
Corporate									
83A1 CORPORATE PROPERTY - ESTATES	(4,865,430)	74,690	731,940	0	2,580	(402,380)	(300)	(4,458,900)	New proposals are a combination of a reduction in Senate Court rent (£632k), additional costs from staff reorganisation (£27k) and increased rates of £175k partially offset by a reduction in valuation fees (£90k). The majority of other adjustments relate to a review of support services recharges to other cost centers which increased by c£300k
83A3 PARKING SERVICES	(7,154,250)	(214,660)	(153,000)	0	454,190	1,840	(4,030)	(7,069,910)	New proposals are a combination of £141k electricity and £75k rates cost reductions partially offset by a £63k increase in staff costs for the Cash Collection team
83B9 MARKETS	(606,940)	7,040	(93,470)	0	(80,180)	(900)	0	(774,450)	New proposals are a combination of £90k increase in Auctioneers income and a small combined reduction in energy and rates costs
86A1 REVENUES & BENEFITS	2,035,120	105,960	67,000	0	0	0	(510)	2,207,570	New proposals are a combination of £60k reduction in expected subsidy, £20k for year end managed services for Council Tax and Business Rates, partially offset by £13k income from BID Administration
86A2 ELECTIONS & ELECTORAL REGISTRATION	405,080	12,510	0	0	(1,550)	(5,770)	0	410,270	No significant changes
86A3 CORPORATE	(55,160)	(2,760)	(500,000)	0	0	10,320	0	(547,600)	New proposal relates to savings anticipated from the implementation of digitisation
86A5 DEMOCRATIC REPRESENTATION	723,920	23,570	3,230	0	(3,910)	(5,810)	(10,380)	730,620	No significant changes
86A7 UNAPPORTIONABLE OVERHEADS	1,323,690	8,150	0	0	0	(12,840)	0	1,319,000	No significant changes
86B1 FINANCIAL SERVICES	937,960	33,860	0	0	0	9,320	(100)	981,040	No significant changes
86B2 INTERNAL AUDIT	121,290	(10)	0	0	0	4,350	0	125,630	No significant changes
86B4 LEGAL SERVICES	257,640	22,270	0	0	0	(32,930)	(20)	246,960	Adjustments were made to reflect the reduction in superannuation costs and an increase to support service recharges.
86B8 PROCUREMENT	123,710	7,370	0	0	0	22,870	(1,490)	152,460	No significant changes
Net Cost	(6,753,370)	77,990	55,700	0	371,130	(411,930)	(16,830)	(6,677,310)	
People & Communities									
81C2 HOUSING NEEDS & HOMELESSNESS	1,206,630	134,890	1,112,650	0	(38,050)	545,280	(2,220)	2,959,180	The budget includes £577k which was removed from the 25/26 budget and a request for £1,112k to replace the loss of grant anticipated in 2026/27.
81E1 GF HOUSING - PROPERTY	78,640	6,950	(1,560)	0	0	(25,660)	0	58,370	No significant changes
86A6 DIGITAL & DATA	266,940	8,090	0	0	0	5,450	(240)	280,240	No significant changes
86B3 HUMAN RESOURCES	821,670	21,950	50,000	0	0	(280)	59,350	952,690	A new proposal to increase the apprenticeship levy budget has been added. A transfer of budget from 81A1 Environmental Health & Licensing has been included to facilitate new Health & Safety roles
86B6 IT SERVICES	2,390,700	(3,070)	100,000	0	91,530	(109,710)	(350)	2,469,100	A new budget proposal was added due to the increase in the annual contract agreement with Strata. An adjustment was made to increase the support service recharges, after a review was carried out across all relevant services.
86B9 EXETER COMMUNITY GRANTS PROGRAMME	555,380	3,860	0	0	0	181,260	120,000	860,500	Adjustments were made to reflect the decrease in funding from the Neighbourhood Community Infrastructure Levy. Additional budget for the new Consultation & Engagement cost centre has been transferred across from various services across the Council.

	BASE ESTIMATE 2025/2026	INFLATION	NEW PROPOSALS RECURRING	NEW PROPOSALS NON- RECURRING	DEPRECIATION ADJUSTMENTS	OTHER ADJUSTMENTS	BUDGET TRANSFERS	NEW ESTIMATE 2026/27	EXPLANATION
86C3 CUSTOMER SERVICE CENTRE	975,180	31,330	51,850	0	0	(62,620)	(570)	995,170	A new budget proposal was added to re-instate a Team Leader post. Adjustments were made to remove 2025/26 non-recurring budgets for the Security & Assistance Officer and security patrol

	BASE ESTIMATE 2025/2026	INFLATION	NEW PROPOSALS RECURRING	NEW PROPOSALS NON- RECURRING	DEPRECIATION ADJUSTMENTS	OTHER ADJUSTMENTS	BUDGET TRANSFERS	NEW ESTIMATE 2026/27	EXPLANATION
86C4 ORGANISATIONAL CHANGE	43,470	30	0	0	(43,020)	(480)	0	0	No significant changes
86C6 PRIVATE HOUSING	62,640	10,250	0	0	0	(2,830)	0	70,060	No significant changes
Net Cost	6,401,250	214,280	1,312,940	0	10,460	310,090	175,970	8,645,310	
Place									
83A4 NET ZERO AND BUSINESS	860,570	20,130	(21,870)	0	320	5,730	(33,840)	831,040	Budgets have been transferred between Net Zero and Community Safety (see 86C7 below) to reflect operational needs
83A5 CULTURE	372,810	9,860	(89,650)	0	(3,700)	21,500	(139,610)	171,210	New proposals due to reduction in utilities and rates. Also the second phase of the Cultural redesign has been included in the Corn Exchange (where this saving will actually come from has yet to be determined). Budget transfers have been made to remove 2025/26 savings from phase one of the Cultural redesign which was added to Museum Services (see 83C2 below)
83A6 TOURISM	0	2,120	0	0	0	(2,120)	0	0	No significant changes
83A9 BUILDING CONTROL & LAND CHARGES	72,680	600	0	0	0	(130)	(150)	73,000	No significant changes
83B5 PLANNING SERVICES	869,850	27,090	(33,000)	0	23,560	(55,640)	(250)	831,610	The new proposal is from the removal of budget from Local Plan Evidence. An error in calculating national insurance was made in 2025/26 so this has been corrected as an adjustment
83C2 MUSEUM SERVICE	2,556,740	91,780	(227,850)	0	(69,770)	(57,610)	218,850	2,512,140	New proposals include material savings against utilities. The saving due to phase one of the Cultural redesign has now been removed so the budget transfer nets off with other transfers across the Culture service
83C3 LEISURE & SPORT	2,412,690	24,040	357,980	0	(36,120)	(117,480)	(34,060)	2,607,050	The budget for Exeter Arena has now been re-instated as a new proposal. A £34k budget was transferred as a contribution to the new Consultation & Engagement cost centre
83C9 VISITOR FACILITIES	89,090	5,240	(22,120)	0	(140)	26,980	(56,850)	42,200	The budget transfer reflects the removal of phase one Cultural redesign savings
86A4 CIVIC CEREMONIALS	260,020	6,060	5,890	0	(11,730)	(1,250)	6,870	265,860	No significant changes
86A8 COMMUNICATIONS	95,430	3,810	(40,240)	0	0	16,570	(82,070)	(6,500)	Advertising revenue has been increased as a new proposal. Budgets have been transferred to remove the 2025/26 savings from phase one of the Cultural redesign, as well as a £10k contribution toward the Consultation & Engagement budget
86C5 CCTV & HOMECALL	572,910	11,720	39,740	0	(16,190)	430	(150)	608,460	New proposals include an additional budget for two central controllers which has been offset with reductions in utilities and rates.
86C7 COMMUNITY SAFETY	5,000	180	335,000	0	0	0	33,810	373,990	The new proposal is a budget for a permanent Community Safety team. This also include a budget transfer from 83A4 Net Zero & Business (see above)
Net Cost	8,167,790	202,630	303,880	0	(113,770)	(163,020)	(87,450)	8,310,060	
TOTAL	21,546,960	971,080	1,751,080	500,000	522,840	(128,290)	0	25,383,990	

EXETER CITY COUNCIL
2026/27 COUNCIL TAX - SUMMARY

	2025/26		2026/27	
Council Tax Base	39,852		40,186	
	Total Expenditure £	Band D Council Tax £	Total Expenditure £	Band D Council Tax £
General Fund Budget	7,506,790	188.37	7,770,860	193.37
Collection Fund (Council Tax) Surplus	(103,692)	(2.60)	(82,783)	(2.06)
TOTAL	7,403,098	185.76	7,688,077	191.31

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GENERAL FUND AVAILABLE RESOURCES

GENERAL FUND	2025-26 £	2026-27 £	2027-28 £	2028-29 £	FUTURE YEARS £	TOTAL £
CAPITAL RESOURCES AVAILABLE						
Capital Receipts Brought Forward	0					0
GF Capital Receipts	9,104,506	3,375,000	0	0	0	12,479,506
Revenue Contributions to Capital Outlay	406,406	0	0	0	0	406,406
Disabled Facility Grant	1,216,990	800,000	800,000	800,000	800,000	3,616,990
Community Infrastructure Levy	1,815,042	6,848,504	0	0	0	8,663,546
Other - Grants/External Funding/Reserves/S106	3,100,019	6,745,706	1,454,000	0	0	11,299,725
Total Resources Available	15,642,963	17,769,210	2,254,000	800,000	800,000	36,466,173
GENERAL FUND CAPITAL PROGRAMME						
Capital Programme	26,175,170	27,512,651	11,866,060	1,263,910	1,263,910	68,081,701
Total General Fund	26,175,170	27,512,651	11,866,060	1,263,910	1,263,910	68,081,701

UNCOMMITTED CAPITAL RESOURCES:						
Capital Receipts Brought Forward	0	9,104,506	12,479,506	12,479,506	12,479,506	0
Resources in Year	15,642,963	17,769,210	2,254,000	800,000	800,000	37,266,173
Less Capital Receipts to carry forward	(9,104,506)	(12,479,506)	(12,479,506)	(12,479,506)	(12,479,506)	(12,479,506)
Less Spend in Year	(26,175,170)	(27,512,651)	(11,866,060)	(1,263,910)	(1,263,910)	(68,081,701)
Borrowing Requirement	19,636,713	13,118,441	9,612,060	463,910	463,910	43,295,034

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GENERAL FUND - CAPITAL PROGRAMME 2026/27 AND FUTURE YEARS

Schemes	NEW BID	2026/27	2027/28	2028/29	Future Years	Financed by	What the scheme is trying to achieve
		£	£	£	£		
Operations							
Depot Improvement Works		7,516,560				CIL / borrowing	Waste Depot improvement works including the MRF.
Capitalised Staff Costs		150,000	150,000	150,000	150,000	Borrowing	To provide for the cost of certain Council employees, which will be directly involved in the construction or acquisition of assets and qualify as capital expenditure, including engineers and surveyors.
Bowling Green Marshes Coastal Defence Scheme		386,260				Grant	To repair the coastal defences to retain the level of protection to the freshwater marshes. The scheme is entirely funded by the Environment Agency.
Parks Infrastructure		210,083				Borrowing	To ensure public safety in parks and open spaces. Works include resurfacing parking areas and repairs to steps, railings and gates.
Cemeteries & Churchyards Infrastructure Improvements		90,608				Borrowing	Reactive infrastructure improvements to cemeteries and churchyards.
Pinhoe Playing Field Upgrades		19,450				S106	Works to upgrade Pinhoe playing fields.
Cricklepit Bridge		84,000				Grant	Full Repair (specification dependent upon PI Report findings) & redecoration. Last full paint coat was 15 years ago and is due for renewal
Trews Weir refurb		5,877,782				Grant / borrowing	Stabilise and refurbish damaged weir.
District Street Lighting		200,000	200,000			Borrowing	Complete stock replacement of aging lighting columns to drop-down type and to LED lamps over 5 year programme.
Piazza Terracina		158,560				Borrowing	Repaving and landscaping Terracina, with new service points to improve suitability for events. Could include spaces for street food and pop-up stalls similar to Guildhall. Potential income from stalls and events which would help to offset some of the costs.
Ash Die Back Tree Replacement		75,000				Borrowing	Tree Removal & Replacement.
Fleet Lease costs		2,329,910	2,066,520			Borrowing	Fleet vehicles and plant replacement programme.
Bromhams Farm Playing Fields		14,669	15,000			Grant	Works to upgrade Bromhams Farm Playing Fields.
Farm Hill Retaining Walls (23 no.)		265,000				Borrowing	Stabilising works and other remedial actions.
Bonhay Rd/Andlaw House Footpath		104,815				Borrowing	Remedial works to replace existing gabion baskets or shore up existing gabion baskets - plus resurfacing of path with tarmac.
Heavitree Paddling Pools		526,690				CIL	Redesign and rebuild paddling pools, add new splash pad and replace dated plant and plant room.
Play Areas		303,630				CIL	Supply & Installation of new play equipment at multiple play areas across the city to replace old, end of life equipment. Cost includes 2 potential full redesigns where all equipment is old and the site could provide better play value and more accessible play in areas of multiple indices of deprivation (Lakeside Avenue & Chestnut Avenue).
Landfill Gas Extraction Systems		156,101				Borrowing	Significant upgrade or replacement of all three extraction systems.
Mincinglake Valley Park Reed Beds & Pipe Inlet		100,000				Borrowing	Re-lining of the lagoon to minimise leaks, coupled with design and construction of new debris screens to minimise blockage risks.

ECC Bridge Repair Programme	463,745					Borrowing	Due to number of required repairs identified in Principal Inspections, create new project for all bridge repairs.
Oxford Road Car Park Retaining Wall	100,000					Grant	ECC contribution towards retaining wall repairs
Outdoor Leisure Facilities - Newcourt	121,270					S106 / borrowing	To provide facilities at Newcourt.
Riverside Walls at Quay	50,000					Borrowing	Underpinning or sheet piling existing Quay walls. Potential opportunity to deliver alongside Trews Weir.
SUB TOTAL	19,304,131	2,431,520	150,000	150,000			
Corporate Resources							
BLRF - Clifton Hill	201,930					Grant	Brownfield Land Release Fund for Clifton Hill site.
SUB TOTAL	201,930	0	0	0			
People & Communities							
Annual Contribution to Strata	53,910	53,910	53,910	53,910		All Borrowing	IT projects
IT Replacement Programme	10,000	10,000	10,000	10,000			
EUC model equipment (replacement laptops)	150,000	150,000	150,000	150,000			
Telephony - Phase 2	NEW	35,936					
Purview	NEW	3,594					
Corporate Asset Management System	NEW	150,000					
Azure Virtual Desktop	NEW	25,155					
System Upgrades	NEW	35,936					
Civic Centre Closure	NEW	400,000					
XLPrint - Cloud Migration	NEW	12,578					
IKEN - Cloud Migration	NEW	28,749					
SDWANT (Discovery)	NEW	26,952					
AI Implementation plan	NEW	17,968					
Digitalisation of paper records	NEW	53,000					
Exeter Tickets Website	NEW	12,500					
One Housing Migration	NEW	100,000					
Parks and Green spaces self-service	NEW	20,000					
Exeter RIT	NEW	120,000					
Waste Management self-service	NEW	30,000					
Telephony routing	NEW	3,594					
Strata staff cost Capitalisation	NEW	107,808					
Disabled Facility Grants	800,000	800,000	800,000	800,000		Grant	To meet the legal duty to pay grants to enable disabled people to remain in their homes.
SUB TOTAL	2,197,680	1,013,910	1,013,910	1,013,910			
Place							
Riverside & RAMM Decarbonisation Phase 4	2,591,290	1,454,000				Grant	Decarbonisation works including roof, heating and cooling replacement works.
New Solar PV sites	1,029,500					Borrowing	To install Solar PV on 6 Council owned sites.
Leisure Equipment Replacement Programme	100,000	100,000	100,000	100,000		Borrowing	To ensure there is a pot available to replace equipment that is damaged or at the end of its useful life.
SUB TOTAL	3,720,790	1,554,000	100,000	100,000			
SUB TOTAL PLANNED CAPITAL PROGRAMME	25,424,531	4,999,430	1,263,910	1,263,910			
APPROVED COMMITTED SCHEMES WITH EXTERNAL FACTORS THAT IMPACT ON DELIVERY TIMESCALES							
Guildhall Shopping Centre Enhancements	2,000,000	6,866,630				Borrowing	Enhancements to Guildhall shopping centre.
St Nicholas Priory Roof	88,120					Borrowing	Contribution towards works on St Nicholas Priory roof.
TOTAL	2,088,120	6,866,630	0	0			
GENERAL FUND SERVICES TOTAL	27,512,651	11,866,060	1,263,910	1,263,910			

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Flexible Use of Capital Receipts

1.0 Introduction

Capital receipts are the money councils receive from asset sales, the use of which is normally restricted to funding other capital expenditure or paying off debt. The receipts cannot usually be used to fund revenue costs.

Since 2016, the Flexible Use of Capital Receipts Direction has allowed local authorities to use the proceeds from asset sales to fund the revenue costs of projects that result in ongoing cost savings or improved efficiency.

In November 2024, the Local Government Finance Policy Statement announced the extension of the flexible use of capital receipts to 2030.

Before the Council can flexibly use capital receipts it must prepare, publish, and maintain a 'flexible use of capital receipts strategy'. This must consider the impact of the flexibility on the affordability of borrowing and its prudential indicators.

Full Council must approve the strategy before any qualifying expenditure is incurred.

2.0 Qualifying Expenditure

The key criteria to use when deciding whether expenditure can be funded by the capital receipts flexibility is that it is forecast to generate ongoing savings to an authorities', or several authorities, and/or to another public sector body's net service expenditure.

Qualifying expenditure means expenditure on a project where incurring up-front costs will generate ongoing savings. Set up and implementation costs of any new processes or arrangements can be classified as qualifying expenditure. The ongoing revenue costs of the new processes or arrangements cannot be classified as qualifying expenditure.

3.0 Qualifying Disposal

Capital receipts used under the direction must be from qualifying disposals. That is, disposals where the authority does not retain an interest, directly or indirectly, in the assets once the disposal has occurred. Where the authority retains some exposure to the risks and rewards of the assets following disposal, it must not use any capital receipts from that disposal.

The direction does not allow authorities to use capital receipts generated by a disposal to an entity that is within the authority's group structure (subsidiaries, associates and joint ventures).

4.0 Accountability

Each authority should disclose the individual projects that will be funded or part funded through capital receipts flexibility to full Council. This requirement can be satisfied as part of the annual budget setting process.

It is a condition of the direction that authorities must send details setting out their planned use of the flexibility to the Secretary of State, in advance of its use for each financial year and must include:

- The amount of planned capitalisation using the flexibility
- The purpose of the expenditure to be capitalised
- The amount of expenditure that was capitalised using the flexibility in the prior year
- The efficiency savings that are directly attributable to the use of the flexibility that were achieved in the prior year

If any of this information is unavailable or unknown, the council must set this out with a description as to why it cannot be provided.

Flexible Use of Capital Receipts Strategy 2026/27

1.0 Objectives and Purpose

- 1.1 This strategy is intended to enable the Council to make use of the Flexible Use of Capital Receipts Direction.

The objectives of this Strategy are to:

- Outline the methodology for funding projects using this flexibility
- Identify actual and potential capital receipts that could be utilised to fund transformation projects
- Identify projects that are considered to be eligible, and which could flexibly be funded from capital receipts
- In subsequent years, report on the progress of projects approved in previous years

2.0 Methodology

- 2.1 To make use of this flexibility, capital receipts must arise in the period 2016/17 to 2029/30, and qualifying expenditure must take place in the same period.
- 2.2 If projects are identified in the Strategy, they can still be financed in whole or in part from other sources, e.g. revenue budgets. Having approved the Strategy, the Council is not obliged to fund these projects from capital receipts. It is Council policy that capital receipts are not relied upon to fund any expenditure until they are realised and as new capital receipts might not necessarily be available during the period of the Strategy, it is essential that alternative sources of funding are levered in, if necessary.

3.0 Project Details

- 3.1 In November 2025, the Council made a joint submission with Plymouth City Council for Local Government Reorganisation in Devon.

Across the Devon area (including Plymouth and Torbay), it is estimated that our proposal will deliver annual, ongoing efficiency savings of around £50m - £70m per annum. These figures are estimates based on detailed modelling and a range of assumptions. Savings from a number of categories are projected:

- Service consolidation savings
- Corporate service consolidation
- Optimising senior leadership
- Optimising costs of democracy
- Property rationalisation
- Service transformation savings
- Harmonisation of fees and charges

Project	2026/27 £m	2027/28 £m	2028/29 £m
Local Government Re-organisation transitional costs			
Redundancy / workforce exit	0	3.0	5.0
Programme Delivery Team	0.9	2.1	0.5
External communication and branding	0	0.3	0.3
Workforce onboarding and culture development	0	0.2	0.2
ICT set up and consolidation	0.5	5.0	3.0
New council establishment – policy & process	0.2	0.2	0.1
Shadow authority costs	0.4	0.8	0
Property rationalisation	0	0.2	0.3
Programme contingency	0	1.0	1.0
Total Estimate	2.0	13.8	10.4

- 3.2 It is for individual authorities to decide whether or not a project qualifies for the flexibility. Guidance sets out a wide range of projects that could generate qualifying expenditure and includes:

- Activities which support or enable efficiency savings, improved service delivery or transformation as part of local government re-organisation

On this basis, it is assessed that the project qualifies for the flexibility.

4.0 Eligible Capital Receipts and Impact on Prudential Indicators

- 4.1 The planned use of the flexibility shown in Section 3 for 2026/27 is set out below:

	2026/27 £m
Eligible General fund Capital Receipts b/fwd	1.5
Projected Capital Receipts	11.8
Planned Use of Flexible Use Direction	(1.5)
Eligible General Fund Capital Receipts c/fwd	11.8

- 4.2 It should be noted that the Council does not currently hold any other significant capital receipts in addition to those set out in the table above.
- 4.3 As it is Council policy not to rely on capital receipts until they are realised, the projected capital receipts above have not been factored into the Council's Capital Financing Requirement (CFR) by way of either reducing debt or financing capital expenditure. Consequently, the use of these receipts under this flexibility will have no effect on the Council's prudential indicators.
- 4.4 The capital receipts, received to date, have also not been earmarked as funding for any other proposed capital expenditure and therefore there is no anticipated additional impact on the Council's prudential indicators as set out in the Council's Treasury Management Strategy.
- 4.5 The Council will also have due regard to the Local Authority Accounting Code of Practice when determining and including the entries required from undertaking and funding this activity within the 2026/27 Statement of Accounts.

5.0 Approval

For 2026/27, the Council will approve the budgeted funding of the projects in the Strategy when approving the General Fund Budget and Capital Programme

January 2026

Balanced Budget 2026/27: Consultation findings

Due to the fact Exeter City Council expect to be able to put forward a balanced budget for 2026-27 without having to consider cutting or reducing services, the format of this consultation was different to last years.

Instead, we wanted to get a picture of what was important to residents in relation to:

- ✓ Local Economy
- ✓ People
- ✓ Homes
- ✓ Sustainable Environment
- ✓ A Well-run Council

To do this we asked people to rank their priorities for these 5 focus areas, giving us quantitative data. We also asked people for their opinions on these 5 focus areas through free text responses, giving us qualitative data.

Additionally, people we also asked to feedback via free text what they feel should be protected from any potential future cuts, and what they felt should be more open to future cost savings/ reductions.

We have displayed this feedback below, demonstrating what people thought was most important to them through the quantitative data, and theming responses from the qualitative data.

Moreover, we have also linked this feedback (where relevant to do so) to the information and data provided in the 2025 Resident Survey.

It should be noted that 58 people took part in the Balanced Budget 2026/27 survey and a total of 1882 people took part in the 2025 Resident Survey.

Contents

Local Economy: Priorities and Key Themes 3

People: Priorities and Key Themes 4

Homes: Priorities and Key Themes 5

Sustainable Environmental: Priorities and Key Themes 6

A Well-Run Council: Priorities and Key Themes 7

Areas to Protect from Budget Cuts: Key Themes 8

Where Reductions or Charges Might Be Acceptable: Key Themes 8

Areas of crossover with 2025 Resident Survey 9

Local Economy: Priorities and Key Themes

Respondents ranked these options in order of priority for the local economy, with number 1 being the highest priority.

1. Supporting independent shops and reducing empty retail units
2. Improving access to employment and skills
3. Attracting new businesses to Exeter
4. Community Safety Initiatives
5. Investing in cultural and tourism events and facilities

These themes come from all free text comments relating to the local economy:

1. City Centre Vitality & Footfall

- Reduce parking charges; make parking free after certain times.
- Encourage visitors and shoppers with cleaner streets and safer public spaces.
- Support independent shops and fill empty units.
- Address antisocial behaviour that deters footfall.

2. Business & Development

- Accelerate planning decisions and make development easier (e.g., disused sites).
- Support local SMEs through procurement rules rather than large consultancies.
- Promote street markets and cultural attractions as economic drivers.

3. Housing's Role in the Economy

- More truly affordable housing to support workforce retention.
- Better use of empty properties; convert unused spaces above shops.
- Prioritise local residents over students; apply stronger rules to student developers.

4. Tourism & Cultural Economy

- Invest in culture, museums, markets, murals, heritage, and green spaces.
- Consider introducing a tourist tax for hotel visitors.

5. Transport Infrastructure

- Improve public transport reliability to support the economy.
- Park & Ride expansion, better cycling infrastructure, congestion reduction.

People: Priorities and Key Themes

Respondents ranked these options in order of priority for people, (e.g. communities, wellbeing and social inclusion), with number 1 being the highest priority.

1. Supporting vulnerable groups and families
2. Reducing health inequalities
3. Maintaining Community buildings and facilities
4. Supporting community resilience and inclusion
5. Improving access to leisure and cultural activities

These themes come from all free text comments relating to people, communities, wellbeing and social inclusion:

1. Youth & Teen Provision

- More youth clubs, teen activities, safe spaces, library/RAMM programmes.
- Concern over cuts to youth work and SEND support.

2. Support for Vulnerable Groups

- Homeless outreach, addiction support, relocation of some services outside main shopping areas.
- More community builders and community initiatives.
- Better SEND services and support for families.

3. Accessibility & Inclusion

- Make public consultations easier; offer non-digital options.
- More welcoming events for autistic/ASD residents.
- More services for immigrant, trans and queer communities.

4. Community Pride & Local Spaces

- Cleaner streets, graffiti removal, weeding, better parks.
- Support community-run groups, neighbourhood collaboration and face-to-face contact.

5. Safety

- Tackle street drinking and antisocial behaviour, especially Sidwell/South Street.
- Improve evening safety and city centre enforcement.

Homes: Priorities and Key Themes

Respondents ranked these options in order of priority related to homes, with number 1 being the highest priority.

1. Building more affordable and social housing
2. Providing temporary accommodation to prevent homelessness
3. Improving housing standards and energy efficiency
4. Funding disabled facilities and warm home grants
5. Supporting tenants and landlords

These themes come from all free text comments relating to homes:

1. More Social & Affordable Housing

- Build more council homes; reduce homelessness.
- Ensure affordability for local residents, not just students or high-income earners.
- Use empty homes; repurpose underused buildings.

2. Quality & Maintenance of Existing Housing Stock

- Address damp, mould, asbestos; improve MEARS responsiveness for housing tenants.
- Improve maintenance and estate management.
- Ensure adapted homes for disabled residents are available and well-managed.

3. Housing Allocation & Planning Policy

- Stop prioritising developers who fail on affordable housing obligations.
- Ensure families or vulnerable residents are placed appropriately.
- Reduce over-focus on co-living blocks and student accommodation.

4. Infrastructure Must Match Housing Growth

- Doctors, schools, roads, transport must come with new developments.
- Concern that rapid housing expansion increases flooding risk.

5. Financial & Policy Measures

- Higher charges for second/third homes.
- Stricter enforcement on private landlords.
- Consider congestion or visitor taxes to support housing investment.

Sustainable Environmental: Priorities and Key Themes

Respondents ranked these options in order of priority for a sustainable environment, with number 1 being the highest priority.

1. Enhancing green spaces and biodiversity
2. Having cleaner streets
3. Improving recycling rates
4. Reducing carbon emissions from Council buildings and services
5. Expanding electric vehicle infrastructure

These themes come from all free text comments relating to a sustainable environment priorities:

1. Cleanliness & Public Realm

- Better street cleaning; weed control; litter removal.
- More bins; improved waste management.

2. Green Spaces, Biodiversity & Planting

- Plant more trees; living walls; rooftop gardens; biodiversity improvements.
- Protect parks and play areas; improve maintenance of green spaces.
- Better river care and environmental stewardship.

3. Active Travel & Transport Sustainability

- More cycle lanes, safer cycling, secure bike storage.
- Encourage walking and cycling over cars.
- Concerns about poorly implemented LTN changes.
- Public transport must improve to support sustainability.

4. Recycling & Waste

- Glass recycling from homes.
- Transparency on what happens to recycled waste.
- Reduce use of weed-control chemicals.

5. Energy & Buildings

- Support for solar panels and energy efficiency improvements.
- Clarify council vs. government responsibilities on energy improvements.

A Well-Run Council: Priorities and Key Themes

Respondents ranked these options in order of priority for a well-run council, with number 1 being the highest priority.

1. Engaging residents and including them in decision-making
2. Ensuring transparency and accountability
3. Enhancing customer service and responsiveness
4. Improving the accessibility of Council information
5. Expanding online and self-service options (e.g. MyExeter)

These themes come from all free text comments relating a well-run council:

1. Transparency & Trust

- Increase openness around planning decisions, housing partnerships, finances.
- Share clearer explanations of decisions and consultation outcomes.
- Address perception that consultation is “tick-box” or disingenuous.

2. Accessibility & Customer Service

- More face-to-face support; less reliance on online systems.
- Improve MyExeter portal; allow council tax visibility online.
- Quicker response times; better communication channels.

3. Staff Culture & Accountability

- More visible presence in communities.
- Concerns about senior roles being ineffective or detached.
- Improve diversity training and customer focus.

4. Operational Basics

- Focus on core services: street cleaning, bins, parks.
- Improve procurement processes; avoid inefficient spending.

5. Partnership Working

- Clarify responsibilities between ECC, DCC, NHS, and voluntary sector.
- Work better with police on ASB and with transport operators.

Areas to Protect from Budget Cuts: Key Themes

These themes come from all free text comments relating to protecting areas from potential future budget cuts:

1. Core Environmental & Public Realm Services

- Street cleaning, refuse collection, parks, green spaces.
 - These are seen as essential for city pride, safety and economy.

2. Vulnerable People & Social Care

- Homelessness support, social care, SEND services, youth work.
 - Many emphasise protecting vulnerable residents over other services.

3. Culture & Libraries

- RAMM, libraries, leisure centres, community groups.
 - It is felt these spaces build community resilience and sense of belonging.

4. Housing Support

- Maintenance of council housing; tackling damp, mould, poor landlords.
 - Affordable housing programmes.

5. Public Transport

- Essential for reducing congestion and ensuring equitable access.

Where Reductions or Charges Might Be Acceptable: Key Themes

These themes come from all free text comments relating to what respondents may be willing to see reduced or charged for in Exeter, to help balance future budgets:

budget in future years:

1. Increased Charges (Rather than making cuts)

- Higher parking permits.
- Some increases to museum or leisure fees if means-tested.
- Fees for planning applications, pest control, or certain recycling services.

2. Reductions in Select Areas

- Reduce police funding slightly to invest in transport.
- Less spending on non-statutory partnership projects (e.g., with university).
- Review inclusion & diversity budgets (not universally supported but repeated).

3. Efficiency Savings

- Cut excessive management layers and councillor expenses.
- Improve procurement efficiency.
- Audit spending on non-essential departments.

4. Waste & Recycling Adjustments

- Explore if some residents are willing to accept reduced refuse collections (e.g., monthly black bins).

5. Charging Visitors & Second Homes

- Tourist tax.
 - Increased charges on second/third homes and HMOs
-

Areas of crossover with 2025 Resident Survey

1. Trust, transparency and acting on resident concerns

Crossover:

Both datasets highlight a trust gap, especially around:

- Acting on resident concerns
- Transparency of decision-making
- Feedback and communication quality

2. Keeping residents informed and accessible information

Crossover:

Both identify a need for clearer, more inclusive communication, especially for:

- Older residents

- Residents with disabilities
- Those who feel digitally excluded

3. Safety and antisocial behaviour (ABS)

Crossover:

Community safety and ASB are major shared concerns, especially relating to:

- City centre (Sidwell Street, High Street, South Street)
- Evening safety
- Substance misuse/ addiction

4. Cleanliness, litter and green space

Crossover:

Both reflect widespread concern across:

- Street cleaning
- Waste and litter
- Maintenance issues (weeds, graffiti)
- Protection and enhancement of green spaces & biodiversity

5. Housing, affordability and homelessness support

Crossover:

Both sets of data highlight concern about:

- Homelessness support
- Availability of affordable/social housing
- Housing quality and maintenance
- Use of empty homes and redevelopment

6. City Centre vitality and business environment

Crossover:

Strong shared emphasis on:

- Supporting independent businesses
- Addressing ASB to drive footfall

- Improving cleanliness/safety to make the city centre more welcoming
- Investment in culture to revitalise the centre

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REPORT TO EXECUTIVE

Date of Meeting: 3 February 2026

REPORT TO COUNCIL

Date of Meeting: 24 February 2026

Report of: Strategic Director of Corporate Resources

Title: HRA Estimates and Capital Programme 2026/27

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 To propose the Housing Revenue Account (HRA) budget for 2026-27, covering both the revenue account and capital programme.

2. Recommendations:

It is recommended that:

2.1 The Council's overall spending proposals in respect of the HRA revenue are recommended to Council for approval.

2.2 Recommend to Council the approval of the HRA Capital Programme.

2.3 Members consider the budget assessment by the Section 151 Officer in Section 10 in agreeing the recommendations.

2.4 The HRA minimum Balance be set at £3.525 million for 2026/27.

3. Reasons for the recommendation:

3.1 To ensure that the Council is in a position to set a balanced budget for the HRA taking into account the resources available.

4. What are the resource implications including non-financial resources:

4.1 Section 10 of the report sets out the resource implications of the proposed budgets.

5. Section 151 Officer comments:

5.1 The HRA is in a position to deliver a balanced budget across the life of the Medium Term Financial Plan. Members should note however that the capital programme reduces over the life of the plan to be financed from the depreciation charge and the revenue contribution to capital. This is the normal amount that the HRA can afford to invest in its existing stock, without further government grant.

For enquiries please contact: democratic.services@exeter.gov.uk

6. What are the legal aspects?

6.1 The statutory requirement for a Housing Revenue Account (HRA) is set out in Part VI of the Local Government and Housing Act 1989. Section 74 of the Act sets out the duty to keep a HRA as a ring-fenced fund and sets out the structure within which the HRA operates. Part VI of the Act sets out the detailed statutory provisions on the operation of the HRA, including credits to the account (income) and debits to the account (expenditure). Section 76 sets out the duty to prevent a debit balance on the HRA. The authority must implement proposals that will secure that the account for each financial year will not show a debit balance. Members will also note the provisions of Schedule 4 of the Act which sets out the requirements concerning 'The Keeping of the Housing Revenue Account'.

7. Monitoring Officer's comments:

7.1 The Monitoring Officer has no additional comments.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal potential impact has been identified on people with protected characteristics as determined by the Act and an Equality Impact Assessment has been included in the background papers for Member's attention.

An EQIA has been completed in respect of Housing Rents and is attached as Appendix 5.

9. Carbon Footprint (Environmental) Implications:

9.1 The report allocates resources and therefore does not in itself have carbon footprint implications. The impact of the Council's overall carbon footprint is reported separately..

10. Report details:

10.1 Background

10.1.1 Since April 2012, the Council's HRA is expected to be self-financing. Thus, all income collected locally from rents, service charges and other sources are kept at a local level to deliver housing services to tenants and to maintain the housing stock.

10.1.2 Since April 2012 each local authority had a limit on the amount of borrowing it could have for the purposes of the HRA, called the 'debt cap'. For Exeter City Council, the debt cap was £57,882,413. The HRA debt cap was formally removed on 29 October 2018, as a result local authorities are now able to borrow for housebuilding in accordance with the Prudential Code.

10.2 Social Rent increases for 2026/27

10.2.1 The underlying rent for each council property is based upon a national rent formula.

The rent formula was established to ensure that social rents take account of:

- The condition and location of a property – reflected in its value;

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- Local earnings; and
- Property size (specifically, the number of bedrooms in a property)

The rent formula for each council dwelling is set, based upon January 1999 levels, and uplifted for inflation each year. On 11th June 2025 MHCLG announced that increases to social housing rents will be limited to the Consumer Price Index (CPI) plus 1% for a further 10 years from 2026. The CPI figure for September 2025 was 3.8%, so under this policy the Council is permitted to apply a rent increase of 4.8% for 2026/27.

10.2.2 For 2026/27 this will result in an average increase of £4.58 per week, over 52 weeks, per property. Rents are collected over 48 weeks, resulting in an average increase of £4.97 per collection week for 2026/27. On a typical 2-bedroom flat the weekly rent for 2026/27 will be £100.08 (over 52 weeks). For comparative purposes, the average weekly rents for a 2-bedroom property in Exeter as at 31st March 2025 were:

- £109.98 per week with a housing association; and
- £260.31 per week rented in the private sector.

10.2.3 Affordable rent allows local authorities to set rents at levels that are typically higher than social rents, at up to 80% of local market rent inclusive of service charges. The intention behind this is to maximise returns and generate capacity for further investment in new affordable housing, allowing more people in housing need to have access to a good quality home at sub-market rent. Affordable rent is charged on new properties built to Passivhaus standard, with the expectation that tenants would benefit from lower fuel bills. Affordable rents may also be increased by 4.8% in line with social rent rises.

10.2.4 Rentals of non-dwellings, such as garages, are outside the scope of the Government's social rent policy. However annual increases to garage rents are generally kept in-line with rises in social rents. Under self-financing local authorities are encouraged to review the rents of non-dwellings in order to ensure associated costs are fully recovered. Allowing for inflationary rises for employee costs and for general repair costs, a rise in line with rent charges is considered appropriate. A 4.8% increase in garage rents and parking spaces has therefore been approved by Executive in December 2025.

10.2.5 Services charges cover services and facilities provided by the authority to tenants which are not covered by their rent. Service charges reflect additional services which may not be provided to every tenant, or which may be connected with communal facilities. Different tenants receive different types of service reflecting their housing circumstances. Service charges are limited to covering the cost of providing the services. Government guidelines advised that authorities should endeavour to keep increases in-line with rent changes, at CPI + 1%, to help keep charges affordable. Increases above this may be made on rare occasions when an authority has increases in costs outside its control, such as increases in fuel costs. Service charge increases of 4.8% have also been approved by Executive in December 2025.

10.2.6 This gives total income in 2026/27 of £23.102m.

10.3 Key Assumptions

For enquiries please contact: democratic.services@exeter.gov.uk

10.3.1 A net overall allowance of (£0.745m) has been included for inflation. The inflationary increases allowed in the budget are:

Pay Award	2.5%
Pay – Increments	0.5%
Electricity	4.0%
Gas	0.0%
Water	3.5%
Insurance	5.0% - 18.0%
General Inflation	3.6%
Housing Rents and Service Charges	4.8%

10.3.2 A review of all budgeted costs and income has been performed to help ensure adequate provision is made for inflation and where allowance has been made for a general inflationary increase, it has been provided for at 3.6%. Pay has been increased by 2.5% although there is a risk that this again may be lower than the actual amount agreed.

10.3.3 Interest is based on the existing loans that have been taken out and the borrowing requirement within the capital programme. Future borrowing requirements are based on rates of around 5.36%, however the Council will seek to continue to internally finance borrowing until rates stabilise from the present elevated levels.

10.4 HRA Revenue Estimates 2026/27 (Appendix 1)

10.4.1 The proposed budgets for 2026/27 indicate that a total of £96,060 will be transferred to the HRA Working Balance. Other than allowances for inflation, the pay award and an anticipated reduction in utilities costs there have been no significant changes compared with the current financial year. The impact on the HRA Working Balance is set out below.

Movement on HRA Working Balance	£
Estimated HRA Working Balance, as at 1/4/26	£4,692,988
Budgeted Surplus for 2026-27	96,060
Balance resolved to be retained (HRA contingency)	(3,525,000)
Total Forecast Balance Available, as at 31/3/27	£1,264,048

10.5 Latest Medium Term Financial Plan (Appendix 2)

10.5.1 An updated Medium Term Financial Plan (MTFP) is set out in Appendix 2. The MTFP indicates that working balances will remain in excess of the £3.525m contingency over the next 4 years.

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10.5.2 There are further uncertainties and factors that could affect the future financial position. These include potential costs arising from increasing regulatory framework, contract inflation, the annual pay award and additional borrowing and revenue costs in respect of any new capital programme commitments.

10.6 HRA Available Resources (Appendix 3)

10.6.1 Appendix 3 sets out the forecast use of the resources available for the HRA. This includes the borrowing requirement of £2.8m in 2026/27 in addition to almost £5m assumed in the current financial year which is necessary to deliver the capital programme. There is a balance of £4.4m total uncommitted capital resources at the end of 2029/30.

10.7 HRA Capital Programme (Appendix 4)

10.7.1 For 2026/27 the HRA medium term financial plan provides for a capital programme of £12.636m. This is planned investment in existing stock and there is currently nothing included in the programme for the provision of new homes. This will be financed as follows;

HRA Capital Finance	£
Major Repairs Reserve	7,238,753
Revenue Contribution to Capital	1,000,000
Capital Receipts	1,597,000
Borrowing	2,800,000
Total HRA Capital Financing 2026/27	12,635,753

10.8 Risk Assessment

10.8.1 It has already been mentioned above in this report that our financial forecasts are based on a number of assumptions including the level of inflation, interest rates, income levels, and general prevailing economic conditions. Economic volatility, higher interest rates and inflation have added substantial costs to running services. In previous years permitted rent increases have not kept pace with the scale of increases seen.

10.8.2 Although the Council faces risks from the assumptions and uncertainties outlined above these have been mitigated by the following:

- Adopting a prudent approach to financial forecasting which involves obtaining information from external professional sources;
- Continuous monitoring and review of the key factors together with regular reports to Members on any key issues;
- Regular budget monitoring meetings with budget managers to ensure that budget pressures are identified at the earliest opportunity;

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- The adoption of robust financial management arrangements including option appraisal, risk assessment and financial monitoring; and
- Retaining a prudent level of reserves and balances.

10.8.3 As part of the general budget-setting process the Council needs to also consider the risks inherent in the budgets set and the adequacy of the measures put in place to manage the potential risks.

10.9 Section 25 Statement of the Robustness of Estimates and Adequacy of Reserves

10.9.1 There is a requirement under Section 25 of the Local Government Act 2003 that requires the Chief Finance Officer of a local authority to formally report to its members on the robustness of the estimates and the adequacy of its reserves when it is considering its budget.

10.10 Robustness of Estimates

10.10.1 I have already outlined above in this report the key assumptions that have been made in the budget proposals for next year including an assessment of the risks and mitigating factors. To assess the robustness of the estimates, the following have been considered:

- The strength of the medium-term financial planning process in operation including the identification of significant service pressures, both unavoidable and through policy decisions;
- The strength of the budget monitoring process in identifying weaknesses and pressures in the existing budgets;
- The use of an annual process of engagement with senior managers and members to test out the robustness of proposals;
- Finance staff providing advice throughout the process on robustness, including vacancy factors, increments, current demand, and income levels.

As the Section 151 Officer for this Council, I therefore consider that the budget estimates for 2026/27 that have been prepared are both robust and achievable.

10.11 Adequacy of Reserves

10.11.1 The HRA manages 4,800 Council Homes on behalf of tenants. It currently has a policy of maintaining a minimum level of reserves at £3.525 million. Like the General Fund, there are a range of risk factors that must be taken into account and the Section 151 Officer has taken a risk-based approach to assessing the level of reserves required. The framework for assessing the risks surrounding the budget needs to consider the following:

- Inflationary pressures;
- Income volatility;
- Insurance excesses;
- Increased repairs & maintenance costs (particularly from voids);
- Interest Rate variations.

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Area of Risk	Explanation	Amount
Inflationary pressures	The impact of the pay award is not known when budgets are set. As Local Government tries to stay ahead of the National Living Wage, pay awards have outstripped estimates over recent years. A 1% increase would add £40,000 to costs. Similarly, a 1% variation in inflation on premises, supplies, services & transport would add £140,000 to costs.	180,000
Income volatility	The HRA is reliant on Rental income to deliver its Services. These are in line with Government policy and the Council has very little room to address unexpected pressures. The Council makes provision for voids at 2.1%. An allowance of 1.5% is therefore held to protect against bad debt movements in year.	345,000
Insurance excess	The Council does not budget for insurance excesses. The property insurance excess is £100,000 each claim and therefore 5 claims in a year would potentially cost £500,000	500,000
Repairs & Maintenance	The Council holds a standard £500 per property in respect of unexpected repairs & maintenance	2,400,000
Interest Rate variations	A 0.5% variation in interest rates would cost the HRA £100,000 on the interest paid by the General Fund	100,000
		£3,525,000

It is therefore proposed to maintain minimum reserves at this level.

11. How does the decision contribute to the Council's Corporate Plan?

11.1 The budget underpins the Corporate Plan by determining the amount of funds available to the Council to deliver its priorities.

12. What risks are there and how can they be reduced?

12.1 The key risks are set out in section 10 above.

13. Are there any other options?

13.1 Not applicable.

Strategic Director for Corporate Resources, Dave Hodgson

Author: Strategic Director for Corporate Resources, Dave Hodgson

For enquiries please contact: democratic.services@exeter.gov.uk

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

List of Appendices:

- Appendix 1 – HRA Revenue;
- Appendix 2 – HRA MTFP;
- Appendix 3 – HRA Available Resources;
- Appendix 4 – HRA Capital; and
- Appendix 5 – EQIA.

HRA REVENUE ESTIMATES 2026/27

	2025/26 BUDGET £	2026/27 BUDGET £	CHANGE £
Management	8,414,530	8,572,670	158,140
Sundry Land Maintenance	641,700	499,140	(142,560)
Repair & Maintenance Programme	9,505,410	9,657,110	151,700
HRA SERVICE PROVISION EXPENDITURE	18,561,640	18,728,920	167,280
Revenue Contribution to Capital	1,000,000	1,000,000	0
Capital Charges	3,724,680	3,894,340	169,660
Net Interest	1,714,090	1,878,030	163,940
HRA EXPENDITURE	25,000,410	25,501,290	500,880
Dwelling Rents	(22,119,330)	(23,183,580)	(1,064,250)
Service Charges	(1,656,590)	(1,828,340)	(171,750)
Other	(663,420)	(585,430)	77,990
HRA NET EXPENDITURE	561,070	(96,060)	(657,130)
Transfer to / (from) HRA Working Balance	(561,070)	96,060	657,130
TOTAL NET HRA BUDGET	0	0	0
	0	0	

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HRA MEDIUM TERM FINANCIAL PLAN (2025/26 - 2029/30)

	2025/26 £'000	2026/27 £'000	2027/28 £'000	2028/29 £'000
Resources				
Rents	21,654	21,654	22,693	23,374
Service Charges	1,657	1,657	1,828	1,851
Other	1,220	1,220	1,207	1,235
Inflation on income	-	1,198	732	754
Likely resources	24,530	25,728	26,460	27,214
Expenditure				
HRA expenditure base budget	18,546	18,594	18,872	18,863
Inflation on expenditure	-	182	148	150
Repairs & Maintenance Programme	-	58	(197)	251
Depreciation	3,725	3,894	4,053	4,151
Revenue Contribution to Capital Outlay	1,000	1,000	2,000	2,000
Net interest	1,471	1,904	1,954	1,954
	24,742	25,632	26,830	27,369
Other Funding				
Contribution to / (from) HRA Working Balance	(212)	96	(370)	(156)
Total Net budget	-	-	-	-
Opening HRA Working Balance	4,905	4,693	4,789	4,419
Closing HRA Working Balance	4,693	4,789	4,419	4,263

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HRA AVAILABLE RESOURCES

HOUSING REVENUE ACCOUNT	2025-26 £	2026-27 £	2027-28 £	2028-29 £	2029-30 £	TOTAL £
CAPITAL RESOURCES AVAILABLE						
Usable Receipts Brought Forward						5,221,900
Major Repairs Reserve Brought Forward						4,999,469
Other HRA Sales	1,189,000	912,000				2,101,000
RTB sales	3,833,581					3,833,581
Major Repairs Reserve	3,724,680	3,894,340	4,052,900	4,151,040	4,390,480	20,213,440
Revenue Contributions to Capital	1,000,000	1,000,000	2,000,000	2,000,000	2,000,000	8,000,000
Grants & External contributions	1,841,290					1,841,290
Borrowing	4,948,380	2,800,000				7,748,380
Long leases	2,645,792					2,645,792
Total Resources available	19,182,723	8,606,340	6,052,900	6,151,040	6,390,480	56,604,852
CAPITAL PROGRAMME						
HRA Capital Programme	19,417,866	12,635,753	8,257,069	6,028,867	5,874,375	52,213,930
Total Housing Revenue Account	19,417,866	12,635,753	8,257,069	6,028,867	5,874,375	52,213,930
UNCOMMITTED CAPITAL RESOURCES:						
Usable Receipts Brought Forward	5,221,900	6,639,359	5,954,359	3,754,359	3,754,359	5,221,900
Major Repairs Reserve Brought Forward	4,999,469	3,346,867	2,454	(1,715)	120,458	4,999,469
Resources in Year	19,182,723	8,606,340	6,052,900	6,151,040	6,390,480	46,383,483
Less Estimated Spend	(19,417,866)	(12,635,753)	(8,257,069)	(6,028,867)	(5,874,375)	(52,213,930)
Uncommitted Capital Resources	9,986,226	5,956,813	3,752,644	3,874,817	4,390,922	4,390,922
WORKING BALANCE RESOURCES:						
Balance Brought Forward	4,905,388	4,692,988	4,789,048	4,419,399	4,263,279	4,905,388
HRA Balance Transfer - to/(from) Working Balance	(580,070)	96,060	(369,649)	(156,120)	36,781	(972,998)
Cumulative forecast under/(over)spend 2025-26	367,670					367,670
Balance Carried Forward	4,692,988	4,789,048	4,419,399	4,263,279	4,300,060	4,300,060
Balance Resolved to be Retained	(3,525,000)	(3,525,000)	(3,525,000)	(3,525,000)	(3,525,000)	(3,525,000)
Uncommitted HRA Working Balance (after balance resolved to be retained of £3.525m)	1,167,988	1,264,048	894,399	738,279	775,060	775,060
TOTAL AVAILABLE CAPITAL RESOURCES (after balance resolved to be retained of £3.525m)	11,154,214	7,220,861	4,647,043	4,613,096	5,165,982	5,165,982

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HRA - CAPITAL PROGRAMME 2026/27 to 2029/30

DESCRIPTION	2026-27	2027-28	2028-29	2029-30	Total
	£	£	£	£	£

INVESTMENT IN EXISTING STOCK					
Adaptations	360,000	360,000	360,000	360,000	1,440,000
Balcony Walkway Improvements	108,000	108,000	108,000	100,000	424,000
Bathroom Replacements (inc. Communal)	480,000	480,000	480,000	480,000	1,920,000
Boiler Replacement Programme & Central Heating	381,375	331,375	331,375	331,375	1,375,500
Common Area Footpath & Wall Improvements	125,000	92,000	92,000	85,000	394,000
Communal Area Improvements - New Flooring	17,178	12,936	25,662	50,000	105,776
Communal Door Entry System Instals	500,000	500,000	300,000	300,000	1,600,000
Electrical Central Heating	10,000	10,000	10,000	10,000	40,000
Electrical Rewires - Communal & Domestic	650,000	650,000	450,000	450,000	2,200,000
Energy retrofit	1,746,478	1,746,478	0	0	3,492,956
Fire Risk Assessment Works	1,235,000	883,000	883,000	883,000	3,884,000
Fire Safety Storage Facilities	109,462	0	0	0	109,462
Fire Alarm Systems Replacement	172,500	0	0	0	172,500
Kitchen Replacements (inc. Communal)	850,000	800,000	750,000	720,000	3,120,000
LAINGS Refurbishments	1,800,000	0	0	0	1,800,000
Lift Upgrades	80,000	80,000	80,000	80,000	320,000
Reroofing - Flats & Houses	1,249,900	1,030,500	1,003,550	1,000,000	4,283,950
Porch Canopies	111,700	99,100	81,600	0	292,400
Structural Repairs	609,160	342,680	342,680	300,000	1,594,520
Window and Door Replacements	1,395,000	606,000	606,000	600,000	3,207,000
Plastering	125,000	125,000	125,000	125,000	500,000
Heating Abbeville & Hamlin	520,000	0	0	0	520,000
Total HRA Capital Programme	12,635,753	8,257,069	6,028,867	5,874,375	32,796,064

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Equality Impact Assessment: Housing Rents and Service Charges 2025/26

The Equality Act 2010 includes a general duty which requires public authorities, in the exercise of their functions, to have due regard to the need to:

- **Eliminate discrimination**, harassment and victimisation and any other conduct that is prohibited by or under the Act.
- **Advance equality of opportunity** between people who share a relevant protected characteristic and people who do not share it.
- **Foster good relations** between people who share a relevant protected characteristic and those who do not

In order to comply with the general duty authorities must assess the impact on equality of decisions, policies and practices. These duties do not prevent the authority from reducing services where necessary, but they offer a way of developing proposals that consider the impacts on all members of the community.

Authorities which fail to carry out equality impact assessments risk making poor and unfair decisions which may discriminate against particular groups and worsen inequality.

Committee name and date:	Report Title	Decisions being recommended:	People with protected characteristics potentially impacted by the decisions to be made:
Executive Committee 16 th December 2025	Housing Rents and Service Charges 2026-2027	That Executive recommend that Council approves: <ul style="list-style-type: none"> • Rents of Council dwellings are increased by 4.8% from 1 April 2026 • Garage rents are increased by 	As the increase is applied universally and does not explicitly target any protected group, it could have an indirect adverse effect on individuals with lower incomes, some of whom may share protected characteristics.

Committee name and date:	Report Title	Decisions being recommended:	People with protected characteristics potentially impacted by the decisions to be made:
		4.8% from 1 April 2026 • Service Charges are increased by 4.8%, from 1 April 2026	The mitigations for this are set out at the end of this table.

Factors to consider in the assessment: For each of the groups below, an assessment has been made on whether the proposed decision will have a **positive, negative or neutral impact**. This must be noted in the table below alongside brief details of why this conclusion has been reached and notes of any mitigation proposed. Where the impact is negative, a **high, medium or low assessment** is given. The assessment rates the impact of the policy based on the current situation (i.e. disregarding any actions planned to be carried out in future).

High impact – a significant potential impact, risk of exposure, history of complaints, no mitigating measures in place etc.

Medium impact – some potential impact exists, some mitigating measures are in place, poor evidence

Low impact – almost no relevancy to the process, e.g. an area that is very much legislation led and where the Council has very little discretion

Protected characteristic/ area of interest	Positive or Negative Impact	High, Medium or Low Impact	Reason
Race and ethnicity (including Gypsies and Travellers; migrant workers; asylum seekers).	Positive	Low	<p>On 11 June 2025 a letter was sent from the Housing Minister to registered providers of social housing regarding the results of the Spending Review 2025.</p> <p>This letter confirmed that the government will permit social housing rents to increase by CPI+1% each year from April 2026. In response to a consultation undertaken by government, the length of this settlement has increased from 5 years to 10 years, giving Registered Providers, lenders, and investors greater long-term certainty.</p> <p>The CPI figure for September 2025 was 3.8%, so under this policy the Council is permitted to apply a rent increase of 4.8% for 2025/26.</p> <p>In addition the government also announced a convergence mechanism that would allow rents on social rent properties that are currently 'below formula' (i.e. lower than the usual maximum that may be charged when a property is let to a new tenant) to increase by an additional amount, over and above the CPI+1% limit, up to formula level.</p> <p>A lower than permitted increase would place a financial constraint on the HRA and result in a lower base-line position for future year rents.</p> <p>For information last years' rent increase was 2.7%.</p>
Disability: as defined by the Equality Act – a person has a disability if they have a physical or mental impairment that has a substantial and long-term adverse impact on their ability to carry out normal day-to-day activities.			See information provided above

Protected characteristic/ area of interest	Positive or Negative Impact	High, Medium or Low Impact	Reason
Sex			See information provided above
Gender reassignment			See information provided above
Religion and belief (includes no belief, some philosophical beliefs such as Buddhism and sects within religions).			See information provided above
Sexual orientation (including heterosexual, lesbian, gay, bisexual).			See information provided above
Age (children and young people aged 0-24; adults aged 25-50; younger older people aged 51-75/80; older people 81+; frail older people; people living with age related conditions. The age categories are for illustration only as overriding consideration should be given to needs).			See information provided above
Pregnancy and maternity including new and breast feeding mothers			See information provided above
Marriage and civil partnership status			See information provided above

Actions identified that will mitigate any negative impacts and/or promote inclusion:

We have a number of support mechanisms to manage potential hardship, which could mitigate the adverse effects of this increase in rents. These include:

- There are 3722 households which are not in receipt of full or partial housing benefit, however these households may be in receipt of other tenancy related benefit such as Universal Credit as many have been 'migrated over', but as the Department for Work and Pensions holds this information, we are not able to say how many of the number above this incorporates. Please note that these figures are correct as at the time of writing, week 33 (17/11/2025) but the numbers are subject to change in the future as people become eligible/ineligible for HB or move to UC

- Financial inclusion support: We have teams who can signpost to organisations offering money advice, we are able to refer our tenants for support and provide assistance in maximising income through benefit claims
- Discretionary Housing Payments (DHPs): we have funds available to support claimants who need help with housing costs
- Rent levels remain well below market rates in Exeter, ECC rents remain significantly below private market or 'affordable rent' levels as levied by housing associations
- Proactive arrears prevention: An in-house income collection team can take a supportive approach to preventing arrears.

Officer: Sarah Hemming
Date: 18.11.25

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REPORT TO EXECUTIVE

Date of Meeting: 3 February 2026

REPORT TO COUNCIL

Date of Meeting: 24 February 2026

Report of: Strategic Director – Corporate Resources & s151 Officer

Title: Capital Strategy 2026-27

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 To set out the proposed 2026/27 Capital Strategy.

2. Recommendations:

2.1 It is recommended that Council approve the Capital Strategy as set out in Appendix A.

3. Reasons for the recommendation:

3.1 The CIPFA 2021 Prudential and Treasury Management Codes require all local authorities to prepare a Capital Strategy report.

The aim of the strategy is to ensure that all elected members fully understand the overall long-term policy objectives and resulting Capital Strategy requirements, governance procedures and risk appetite.

4. What are the resource implications including non-financial resources:

4.1 The financial resources required are set out in the body of this report.

5. Section 151 Officer comments:

5.1 There are no significant changes to the strategy this year. As a result of Local Government Reorganisation, the Council is reliant on capital receipts to support the transition costs associated. Setting aside all capital receipts means the Council is even more reliant on borrowing to fund additional schemes, which will have a negative impact on the General Fund and HRA. As such, neither is in a position to take on further schemes without a fundamental improvement in interest rates.

6. What are the legal aspects?

6.1 The capital expenditure system is framed by the Local Government and Housing Act 1989 and the Local Government Act 2003. The CIPFA Prudential Code for Capital Finance in Local Authorities (Prudential Code) and the Treasury management in the Public Services Code of Practice and Cross-Sectoral Guidance notes (the Treasury Management Code) were updated in December 2021. The Codes set out the obligation on all local authorities to prepare a Capital Strategy report and the requirements of the report. The proposed Capital Strategy for Exeter City Council for 2026-2027 is set out on Appendix A.

7. Monitoring Officer's comments:

7.1 This report raises no issues for the Monitoring Officer.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal no potential impact has been identified on people with protected characteristics as determined by the Act because the report is for information only

9. Carbon Footprint (Environmental) Implications:

9.1 No direct carbon/environmental impacts arising from the recommendations.

10. Report details:

10.1 The Capital Strategy is reported separately from the Treasury Management Strategy Statement; non-treasury investments will be reported through the former. This ensures the separation of the core treasury function under security, liquidity and yield principles, and the policy and commercialism investments usually driven by expenditure on an asset.

The proposed Capital Strategy is attached at Appendix A.

10.2 The Capital Strategy is due to be reviewed and updated by the newly formed Capital Programme Board as part of a wider review of the process around the capital programme. The updated strategy will go to Council for approval within the next 12 months.

11. How does the decision contribute to the Council's Corporate Plan?

11.1 The Capital Programme contributes towards all of the key purposes, as set out in the Corporate Plan.

12. What risks are there and how can they be reduced?

12.1 Areas of budgetary risk are highlighted to committee as part of the quarterly budget monitoring updates.

13. Are there any other options?

13.1 No

Strategic Director Corporate Resources & s151 Officer, David Hodgson

Author: Kayleigh Searle, Finance Lead - Capital

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

List of Appendices:

- Appendix A – Capital Strategy 2026-27

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APPENDIX A

EXETER CITY COUNCIL CAPITAL STRATEGY 2026/27

1. Introduction

- 1.1. This Capital Strategy sets out how, when the City Council considers often competing demands for investments, it takes account of stewardship, value for money, prudence, sustainability and affordability in a long-term context, and gives due consideration to both risk and reward and impact on the achievement of the Council's priority outcomes. It is part of the Council's integrated operational, revenue, capital and balance sheet planning.
- 1.2. As local authorities become increasingly complex and diverse, it is vital that Councillors and Senior Officers are fully informed about the long-term context in which investment decisions are made and about all the financial and operational risks to which the authority is exposed. With local authorities having increasingly wide powers around commercialisation and being part of group arrangements or combined authorities, it is increasingly important for Councils to take into account the residual risks and liabilities all around them.
- 1.3. This Capital Strategy covers both the General Fund and the Housing Revenue Account, supporting service provision and linking with the Council's Corporate Plan and Medium Term Financial Strategy. It provides a framework for the development of the three-year capital programme.

2. Purpose and Aims

The Prudential Code for Capital Finance in Local Authorities (the Prudential Code) and the Treasury management in the Public Services Code of Practice and Cross-Sectoral Guidance notes (the Treasury Management Code) were updated by CIPFA in December 2021. The 2021 Prudential and Treasury Management Codes require all local authorities to prepare a Capital Strategy report which will provide the following:

- A high-level long-term overview of how capital expenditure, capital financing and treasury management activity contribute to the provision of services
- An overview of how the associated risk is managed
- The implications for future financial sustainability

The aim of the strategy is to ensure that all the Authority's elected members fully understand the overall long-term policy objectives and resulting Capital Strategy requirements, governance procedures and risk appetite.

- 2.1. The purpose of this Capital Strategy is to help achieve the Council's four strategic priorities set out in the Corporate Plan *2025-2028:
 - i. Local Economy
 - ii. Homes
 - iii. People
 - iv. Sustainable Environment

These priorities contribute to the Exeter Vision 2040:

"By the time they are an adult, a child born in Exeter today will live in a city that is inclusive, healthy and sustainable – a city where the opportunities and benefits of prosperity are shared and all citizens are able to participate fully in the city's economic, social, cultural and civic life."

3. What is Capital Expenditure?

- 3.1. An understanding of what constitutes capital expenditure is fundamental to realising the benefits that an authority can obtain under the Prudential framework. Unless expenditure qualifies as capital it will normally fall outside the scope of the framework and be charged to revenue in the period that the expenditure is incurred. If expenditure meets the definition of capital, there may be opportunities to finance the outlay from capital receipts or by spreading the cost over future years' revenues.

There are three ways in which expenditure can qualify as capital under the framework:-

- The expenditure results in the acquisition, construction or enhancement of fixed assets (tangible and intangible) in accordance with 'proper practices'.
- The expenditure meets one of the definitions specified in regulations made under the 2003 Local Government Act.
- The Secretary of State makes a direction that the expenditure can be treated as capital expenditure.

4. Approach to Capital Investment

- 4.1. The Council's approach to capital investment is fundamental to the Council's financial planning processes. It aims to ensure that:

- Capital expenditure contributes to the achievement of the Council's strategic plan.
- An affordable and sustainable capital programme is delivered.
- Use of resources and value for money is maximised.
- A clear framework for making capital expenditure decisions is provided.
- A corporate approach to generating capital resources is established.
- Access to sufficient long-term assets to provide services are acquired and retained.
- Invest to save initiatives to make efficiencies within the Council's revenue budget are encouraged.
- An appraisal and prioritisation process for new schemes is robust.

5. Governance Arrangements

5.1. Capital Programme Approvals

The Authority's constitution and financial regulations govern the capital programme as set out below:

- All capital expenditure must be carried out in accordance with the financial regulations (updated October 2025) and the Council's Constitution.

- The expenditure must comply with the statutory definition of capital purposes as defined within this document and wider financial standards.
- The Capital Programme approved by Full Council as part of the Council's annual budget report sets the capital funding availability for the Council, the prioritisation of funding and the schemes receiving entry into the Capital Programme.
- Officers are not authorised to commit expenditure without prior formal approval as set out in the financial regulations.
- Each scheme must be under the control of a responsible person / project manager.
- Any agreements (such as Section 106) which contractually commit to procure capital schemes will need to follow the same approval process as other capital expenditure before it can be formally incorporated into the capital programme.

Full Council:

- Approves the capital programme as part of the Annual Budget Report within the strategic boundaries set by the Council.
- Approves capital schemes into the approved capital programme to enable commencement of delivery and schemes to start to incur expenditure.

6. Funding Streams

Exeter City Council's Capital Programme is funded from a mix of sources including:

- **Prudential Borrowing** – The introduction of the Prudential Code in 2004 allowed the Council to undertake unsupported borrowing. This borrowing is subject to the requirements of the Prudential Code for Capital Expenditure for Local Authorities. The Council must ensure that unsupported borrowing is affordable, prudent and cost effective. This funding can also be used as an option to front fund development to stimulate growth. This has provided the Council with the flexibility to raise capital funding as demand and business need has dictated. This type of borrowing has revenue implications for the Council in the form of financing costs. An authority must not borrow to invest primarily for financial return.
- **External Grants** – Funding from external bodies for specific project or purpose, such as disabled facilities grant funding.
- **Section 106, Community Infrastructure Levy (CIL) and External Contributions** – Elements of the capital programme are funded by contributions from private sector developers and partners.
- **Revenue Funding** – The Council can use revenue resources to fund capital projects on a direct basis and this funding avenue has been used in the past. However, pressures on the Council's revenue budget has reduced options in this area and therefore the preference is for Invest to Save options to be adopted where feasible.
- **Capital Receipts** – The Council is able to generate capital receipts through the sale of surplus assets such as land and buildings. The Council seeks to maximise the level of these resources which will be available to support the Council's plans.

International Financial Reporting Standard (IFRS) 16 – Leases

From 1 April 2024 IFRS 16 replaced the previous lease accounting standard as the method to account for leases in the Council's annual accounts.

The main impact was to remove the traditional distinction between finance leases and operating leases. Now all leased-in agreements result in a 'Right of Use' asset on the Balance Sheet and a corresponding debt (lease liability) in the Council's accounts. Leases for items of low value and leases that expire within 12 months are exempt. The de minimis limit for IFRS 16 has been set at £10,000, in line with the Council's capital expenditure de minimis.

Future leases in (unless exempt) will constitute capital expenditure, and assets will be accounted for in the same way as if they had been acquired.

Capital Programme and Minimum Revenue Provision

The size of the Capital Programme will be influenced by funding sources and financing costs. The main limiting factor on the Council's ability to undertake capital investment is whether the revenue resource is available to support in full the implications of capital expenditure, both borrowing costs and running costs, after allowing for any support provided by central government, now mainly through capital grants.

The Council is required to set aside a Minimum Revenue Provision (MRP) in respect of capital expenditure previously financed by borrowing. The Annual Statement of Minimum Revenue Provision is set out in the Prudential Code for Capital Finance report. To reduce risk and minimise costs in light of elevated interest rates, it has been decided to defer borrowing where possible, or where necessary borrow for shorter periods with the intention of re-financing when rates are more favourable. However, some targeted long-term borrowing may be undertaken in 2026-27, where the costs will be offset against future income streams.

Revenue Implications

The revenue implications of capital investment must always be considered in investment decisions and prioritisation of projects. These include costs and savings implications. Costs to consider include:

- Cost of borrowing (including Minimum Revenue Provision)
- Loss of investment income if reserves or useable capital receipts are used
- Running costs associated with the asset.

Savings, including benefits, to identify in the proposal include:

- Any positive impact of investment and economic growth on the Council's council tax base and business rates income
- Capital projects that generate income, revenue savings or efficiencies.

7. Stewardship of Assets

The Council's Asset Management Plan sets out the condition of its assets and the arrangements for managing these effectively. The Council's Corporate Property Strategy enhances these arrangements, including increasing the awareness that efficient use of property is an important element of maximising the value obtained from the Council's overall resources.

An extensive stock condition survey has been carried out on the majority of the Council's assets. This underpins the capital programme and was updated to include the impact of our leisure portfolio of assets. The impact of rising costs and interest rates have caused the full capital programme to become unaffordable in the short-term and therefore the programme has been reduced to prioritise those assets which are considered highest risk.

8. Service Objectives

The option appraisal of proposed capital schemes overseen considers, amongst other factors, the following:

- How the proposal help achieve the objectives and priorities set out in the Council's Corporate Plan 2025-2028.
- How the proposal will help achieve objectives set out in Service Plans.
- The service improvements and other anticipated benefits expected to be delivered from the investment.

9. Monitoring

- Capital budget holders are responsible for providing quarterly forecasts to the Finance Team. Any slippage, acceleration, underspends or overspends on schemes is identified as soon as possible.
- All forecasts are collated by the Finance Team and reported to Council on a quarterly basis.

STRATEGIC DIRECTOR – CORPORATE RESOURCES & S151 OFFICER
JANUARY 2026

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REPORT TO EXECUTIVE

Date of Meeting: 3 February 2026

REPORT TO COUNCIL

Date of Meeting: 24 February 2026

Report of: Strategic Director – Corporate Resources & s151 Officer

Title: Treasury Management Strategy Report 2026/27

Is this a Key Decision?

No

Is this an Executive or Council Function?

Executive

1. What is the report about?

1.1 To seek adoption by the Council of the Treasury Management Strategy Report, incorporating the Annual Investment Strategy 2026/27, and revised supporting Treasury Management Practices, as required under section 15(1)(a) of the Local Government Act 2003.

2. Recommendations:

2.1 That Executive recommend to Council the adoption of the Treasury Management Strategy and Treasury Management Practices and the delegations contained therein

3. Reasons for the recommendation:

3.1 The Council has adopted the CIPFA Treasury Management in the Public Services: Code of Practice and Cross Sectoral Guidance Notes which require the Council to approve a Treasury Management Strategy before the start of each financial year. The Code of Practice was adopted in February 2012. The Code was updated in December 2021.

In addition, the Ministry of Housing, Communities and Local Government (MHCLG) Guidance on Local Authority Investments requires the Council to approve an investment strategy before the start of each financial year.

MHCLG and CIPFA have extended the meaning of 'investments' to include both financial and non-financial investments. This report deals solely with financial investments. Non-financial investments are covered in the Capital Strategy which is presented in a separate report to this Committee.

The Council has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk are therefore central to the Authority's Treasury Management Strategy.

4. What are the resource implications including non-financial resources:

4.1 Treasury Management is carried out by the Finance team of the Council, with advice procured from a specialist advisor. Prudent Treasury Management supports the Council's financial position by generating interest on investments / deposits and seeking to minimise the amount of interest paid on borrowing.

5. Section 151 Officer comments:

5.1 The Treasury Management Strategy sets the Council's strategy for both borrowing and lending money. It is critical therefore that members are familiar and comfortable with the range of institutions included within the Strategy. The Treasury Management Practices set the parameters for the day to day implementation of the strategy.

6. What are the legal aspects?

6.1 In February 2012 the Council adopted the updated *CIPFA Treasury Management in the Public Services: Code of Practice*, which requires the Council to approve a Treasury Management Strategy before the start of each financial year. Adoption of the Code is required by regulations laid under the Local Government Act 2003.

7. Monitoring Officer's comments:

7.1 This report raises no issues for the Monitoring Officer.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal no potential impact has been identified on people with protected characteristics as determined by the Act because the report is for information only.

9. Carbon Footprint (Environmental) Implications:

9.1 No direct carbon/environmental impacts arising from the recommendations.

10. Report details:

10.1 This is a statutory Strategy recommended for adoption by full Council. The key issues to be considered are:

- Investments in the CCLA – LAMIT fund have been made and details of the dividend yield are included in paragraph 3.1 of Appendix A attached to this report.
- Section 4.4 of Appendix A sets the limits on the value of investments to be held by any one institution and the type of institution that can be used.
- The maximum limit to be lent to any one organisation in respect of Property Funds was approved in December 2017, the maximum to be lent to any one organisation for this type of investment is £10m.
- All other limits on the value of investments to be held by one institution remains at £5m (other than the UK Government and money market funds).
- Section 3 of Appendix A sets out the current levels of borrowing and investments, along with the estimated changes and the financial impact for the year on both the General Fund and HRA.

- Sections 5 and 6 of Appendix A set out the planned strategy for the year, which Council must be satisfied meets their objectives and is in line with the level of risk they are comfortable to take.

11. How does the decision contribute to the Council's Corporate Plan?

11.1 Treasury Management supports the Council in generating additional funds for investing in Services, whilst minimising the amount of interest paid on borrowings. It does not in itself contribute to the Council's Corporate Plan.

12. What risks are there and how can they be reduced?

12.1 The investment limits are designed to reduce risk as far as possible, however with any investments there is a risk of default. The Council minimises this risk by imposing limits on where cash can be invested based on credit ratings from the two main rating agencies and setting monetary and time limits on investments. Investments tend to be in immediate access accounts, or short term (less than three months).

13. Are there any other options?

13.1 No

Strategic Director Corporate Resources & s151 Officer, David Hodgso

Author: Kayleigh Searle, Finance Lead - Capital

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

List of Appendices:

- Appendix A – Treasury Management Strategy
- Appendix B – Liability Benchmark

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EXETER CITY COUNCIL

TREASURY MANAGEMENT STRATEGY 2026/27

1. Introduction

- 1.1. The Council's Treasury Management Strategy (TMS) is based on the requirements of the MHCLG's Guidance on Local Government Investments ("the Guidance"), and CIPFA's Treasury Management Code and Prudential Codes as updated in December 2021. This Authority must have regard to these Codes of Practice when preparing the Treasury Management Strategy Statement including the Annual Investment Strategy and also related reports during the financial year.

The revised Treasury Management Code requires all investments and investment income to be attributed to one of the following three purposes:

Treasury management

Arising from the organisation's cash flows or treasury risk management activity, this type of investment represents balances which are only held until the cash is required for use. Treasury investments may also arise from other treasury risk management activity which seeks to prudently manage the risks, costs or income relating to existing or forecast debt or treasury investments.

Service delivery

Investments held primarily and directly for the delivery of public services including housing, regeneration and local infrastructure. Returns on this category of investment which are funded by borrowing are permitted only in cases where the income is "either related to the financial viability of the project in question or otherwise incidental to the primary purpose".

Commercial return

Investments held primarily for financial return with no treasury management or direct service provision purpose. Risks on such investments should be proportionate to an authority's financial capacity – i.e., that 'plausible losses' could be absorbed in budgets or reserves without unmanageable detriment to local services. An authority must not borrow to invest primarily for financial return.

2. Economic Context

The third quarter of 2025/26 (October to December 2025) saw:

- A -0.1% m/m change in real GDP in October, leaving the economy no bigger than at the start of April.
- The 3myy rate of average earnings growth excluding bonuses fall to 4.6% in October, having been as high as 5.5% earlier in the financial year.
- CPI inflation fall sharply from 3.6% to 3.2% in November, with core CPI inflation easing to 3.2%.
- The Bank of England cut interest rates from 4.00% to 3.75% in December, after holding in November.
- The 10-year gilt yield fluctuate between 4.4% and 4.7%, ending the quarter at 4.5%.

In the UK, the CPI measure of inflation is at 3.2% (November 2025), somewhat above the target of 2% the Bank of England's Monetary Policy Committee is trying to achieve over a two to three years' time horizon. Although recent inflation and employment data points towards a reduction in headline inflation through 2026, the Bank will need to exercise fine judgment as to the degree of inflation emanating from the 26 November Budget, and the tariff policies of President Trump. Moreover, geo-political events may play a meaningful part in impacting monetary policy over the coming months.

Interest rate forecasts

The Council has appointed MUFG Corporate Markets (formerly Link Group) as its treasury advisor and part of their service is to assist the Council to formulate a view on interest rates. The following table gives MUFG Corporate Markets forecast to March 2029.

MUFG Corporate Markets Interest Rate View 22.12.25													
	Mar-26	Jun-26	Sep-26	Dec-26	Mar-27	Jun-27	Sep-27	Dec-27	Mar-28	Jun-28	Sep-28	Dec-28	Mar-29
BANK RATE	3.75	3.50	3.50	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25	3.25
3 month ave earnings	3.80	3.50	3.50	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30	3.30
6 month ave earnings	3.80	3.50	3.50	3.40	3.30	3.30	3.30	3.40	3.40	3.40	3.40	3.40	3.40
12 month ave earnings	3.90	3.60	3.60	3.50	3.40	3.50	3.50	3.50	3.50	3.50	3.60	3.60	3.60
5 yr PWLB	4.60	4.50	4.30	4.20	4.10	4.10	4.10	4.10	4.10	4.10	4.10	4.10	4.10
10 yr PWLB	5.20	5.00	4.90	4.80	4.80	4.70	4.70	4.70	4.70	4.60	4.60	4.60	4.70
25 yr PWLB	5.80	5.70	5.60	5.50	5.50	5.40	5.30	5.30	5.30	5.20	5.20	5.20	5.20
50 yr PWLB	5.60	5.50	5.40	5.30	5.30	5.20	5.10	5.10	5.10	5.00	5.10	5.00	5.00

3. Current and Expected Treasury Portfolios

3.1. Investments

The Council's fixed term deposits held at 31 December 2025 were:

Property Funds

Amount	Investment	Dividend Yield as at Q2
£5,000,000	CCLA – LAMIT Property Fund	4.34%

Money Market Funds

Amount	Investment	Interest rate*
£10,000,000	Federated Investors	4.20%
£0	CCLA - The Public Sector Deposit Fund	4.17%
£10,000,000	Black Rock Asset Management	4.10%
£10,000,000	Aberdeen Standard Investments	4.19%
£30,000,000	Total	

* Interest rate is variable (therefore rates quoted are an average to 31st December 2025)

3.2. Borrowings

The Council's long-term borrowing is currently £162.124 million (£89.880 million General Fund and £72.244 million HRA) and short-term borrowing is £10 million. Details of loans are set out below:

Principal Amount outstanding as at 31 December 2025	Lender	Interest rate	Loan type	Date of repayment
£56,884,000	PWLB (HRA)	3.48%	Maturity	28/03/2062
£1,744,752	PWLB	2.34%	Annuity	11/01/2044
£1,693,143	PWLB	2.08%	Annuity	04/04/2044
£3,889,847	PWLB	1.61%	Annuity	26/09/2049
£7,638,227	PWLB	1.71%	Annuity	26/09/2054
£33,181,286	PWLB	1.80%	Annuity	26/09/2069
£15,360,000	PWLB (HRA)	1.31%	Maturity	14/04/2070
£41,732,722	PWLB	1.78%	Annuity	24/12/2071
£10,000,000	PWLB	4.87%	Maturity	12/03/2026

3.3. Expected changes

The current capital programme 2026/27 to 2028/29 indicates a further borrowing requirement of £42.059 million for the General Fund and £6.278 million for the HRA.

The decision of whether to take external long-term borrowing will be made in light of current and forecast interest rates and the decision is delegated to the Section 151 Officer and Leader of the Council.

3.4. Budget implications

The tables below show the expected interest payments on existing PWLB debt and fleet and other lease arrangements, and budgeted interest on balances for both General Fund and HRA for 2026/27.

If actual levels of investments and borrowing, and actual interest rates differ from forecast, performance against budget will differ correspondingly.

General fund interest	2026/27 Estimate
Interest payable	£2,269,000
Total Interest receivable	(£1,439,000)
Less interest to HRA and other	£795,000
Net interest payable	£1,625,000
CCLA LAPF dividend	(£225,000)
Net interest after dividends	£1,400,000

HRA interest (including COB)	2026/27 Estimate
Interest payable	£2,655,030
Interest receivable	(£795,000)
Net interest payable	£1,860,030

The expected Minimum Revenue Provision for repayment of debt for 2026/27 is £3.084 million.

4. Investment Strategy

- 4.1. The Council holds surplus funds, which represent income received in advance of expenditure plus balances and reserves held. Both the CIPFA Code and the MHCLG Guidance require the Council to invest its funds prudently, and to have regard to the **security** and **liquidity** of its investments before seeking the highest rate of return, or **yield**.
- 4.2. Council approved a Treasury Management Environmental, Social and Governance policy in December 2024 which includes consideration of ESG issues as part of its Treasury Management activity, provided that the key priorities of security, liquidity and yield are met.
- 4.3. Specified Investments

Specified investments are those expected to offer relatively high security and liquidity, and can be entered into with the minimum of formalities. The MHCLG Guidance defines specified investments as those:

- denominated in pounds sterling,
 - due to be repaid within 12 months of arrangement,
 - not defined as capital expenditure by legislation, and
 - invested with one of:
 - the UK Government,
 - a UK local authority, parish council or community council, or
 - a body or investment scheme of “high credit quality”.
- 4.4. The Council defines the following as being of “high credit quality” for making specified investments, subject to the monetary and time limits shown.

In-house investment	Monetary limit ¹	Time limit
UK owned banks and building societies holding short-term credit ratings no lower than F1+ and P-1	£4m each	12 months
Foreign owned banks that deal in sterling holding short-term credit ratings no lower than F1+ and P-1	£3m each	9 months

UK owned banks and building societies holding short-term credit ratings no lower than F1 and P-1	£3m each	6 months
Money market funds ² and similar pooled vehicles holding the highest possible credit ratings (AAA)	£10m each	3 months
Property Funds	£10m each	3 months
UK Central Government	no limit	12 months
UK Local Authorities ³		
Upper Tier	£5m each	12 months
Lower Tier	£5m each	12 months

¹ banks within the same group ownership are treated as one bank for limit purposes

² as defined in the Local Authorities (Capital Finance and Accounting) Regulations 2003

³ as defined in the Local Government Act 2003

- 4.5. The maximum that will be lent to any one organisation (other than the UK Government) will be £5 million, with the exception of Property Funds and Money Market Funds where the limit is £10m. For an individual bank, the limit is £4 million. A group of banks under the same ownership will be treated as a single organisation for limit purposes.

4.6. Non specified Investments

No non specified investments will be made by the Council.

4.7. Foreign countries

Investments in foreign countries will be limited to those that hold a AAA or AA+ sovereign credit rating from all three major credit rating agencies, and to a maximum of £3 million per country. Only banks that are domiciled in the UK but are owned in another country will be used and need to meet the rating criteria of and will count against the limit for both countries. There is no limit on investments in the UK.

Liquidity management

The Council uses purpose-built cash flow forecasting to determine the maximum period for which funds may prudently be committed. The forecast is compiled on a pessimistic basis, with receipts under-estimated and payments over-estimated to minimise the risk of the Council being forced to borrow on unfavourable terms to meet its financial commitments.

Limits on long-term investments are set by reference to the Council's medium term financial plan and cash flow forecast.

4.8. Credit ratings

The Council uses credit ratings from two main rating agencies Fitch Ratings Ltd and Moody's Investors Service to assess the risk of loss of investments. The lowest available credit rating will be used to determine credit quality.

Credit ratings are obtained and monitored by the Council's treasury advisers, who will notify changes in ratings as they occur. Where an institution has its credit rating downgraded so that it fails to meet the above criteria then:

- no new investments will be made,

- any existing investments that can be recalled at no cost will be recalled, and
- full consideration will be given to the recall of any other existing investments

Where a credit rating agency announces that it is actively reviewing an organisation's credit ratings with a view to downgrading it so that it is likely to fall below the above criteria, then no further investments will be made until the outcome of the review is announced.

Sole reliance will not be placed on the use of this external service. In addition, the Council will also use market data and market information, as well as information on any external support for banks to help support its decision-making process.

4.9. Other information on the security of investments

Full regard will be given to other available information on the credit quality of banks and building societies, including credit default swap prices, financial statements and rating agency reports. No investments will be made with an organisation if there are substantive doubts about its credit quality, even though it may meet the above criteria.

4.10. Other information on the security of investments

Full regard will be given to other available information on the credit quality of banks and building societies, including credit default swap prices, financial statements and rating agency reports. No investments will be made with an organisation if there are substantive doubts about its credit quality, even though it may meet the above criteria.

4.11. Investment instruments

Investments may be made using any of the following instruments:

- interest paying bank accounts
- fixed term deposits
- call or notice deposits (where the Council can demand repayment)
- certificates of deposit
- treasury bills and gilts issued by the UK Government
- bonds issued by multilateral development banks
- shares in money market funds

5. **Planned investment strategy for 2026/27 – In-House**

5.1. The cash flow forecast will be used to divide surplus funds into three categories:

- Short-term – cash required to meet known cash outflows in the next month, plus a contingency to cover unexpected cash flows over the same period.
- Medium-term – cash required to manage the annual seasonal cash flow cycle, including amounts to cover forecast shortages, planned uses of reserves, and a longer-term contingency.
- Long-term – cash not required to meet cash flows and used primarily to generate investment income.

5.2. The Council's in-house managed funds are based on the likely cash flow position. Investments will be made to ensure that cash flow is protected, and borrowing is minimised. In the current economic climate, it is considered appropriate to keep

investments short term to cover cash flow needs. However, where appropriate (from an internal as well as external perspective), the Council will also consider investments for a longer period up to 12 months. These are funds which are not required for day-to-day cash management purposes.

- 5.3. The Council will seek to utilise money market funds (Aberdeen, Blackrock, Federated, and CCLA) and use short-dated deposits to ensure liquidity of assets for day-to-day cash flow. Although these are essentially cash, a monetary limit in line with the banks' credit rating is retained on the accounts. The Council can also make use of the Government's Debt Management Office to ensure the highest possible security for cash. Additionally, the Council will hold a balance on its general account to cover any payments due. On occasion, to facilitate cash flow requirements, there may be in excess of £3 million in this account.

6. Borrowing Strategy

- 6.1. The Council's capital financing requirement (CFR, or underlying need to borrow) as at 31 March 2026 is expected to be £237.477 million and is forecast to rise to £242.393 million by March 2027 as capital expenditure is incurred.
- 6.2. The maximum expected long-term borrowing requirement for 2026/27 is:

	£m
Borrowed in prior years (GF)	89.88
Long term borrowing (HRA)	72.244
Not borrowed in previous years	75.353
Forecast increase in CFR	4.916
TOTAL	242.393

- 6.3. The Council is expected to be in an under-borrowed position as at 31 March 2026. This means that the capital borrowing need (the Capital Financing Requirement), has not been fully funded with loan debt as cash supporting the Council's reserves, balances and cash flow has been used as a temporary measure. This strategy is prudent as borrowing costs remain elevated and to mitigate exposure to counterparty risk.

Against this background and the risks within the economic forecast, caution will be adopted with the 2026/27 treasury operations. The Section 151 Officer will monitor interest rates in financial markets and adopt a pragmatic approach to any change in circumstances.

- 6.4. To reduce risk and minimise cost on the General Fund, it has been decided to defer borrowing where possible, however some targeted long-term borrowing may be undertaken in 2026/27, where the costs will be offset against future income streams.
- 6.5. In addition, the Council may borrow for short periods of time (normally up to two years) to cover cash flow shortages.
- 6.6. If borrowing is required advice will be sought from the treasury management advisors in order that the most cost-effective form of borrowing can be secured.

6.7. Sources of borrowing

The approved sources of long-term and short-term borrowing will be:

- Public Works Loan Board
- any institution approved for investments above
- any other bank or building society on the Financial Services Authority list.

6.8. Debt instruments

Loans will be arranged by one of the following debt instruments:

- fixed term loans at fixed or variable rates of interest
- lender's option borrower's option (LOBO) loans.

As an alternative to borrowing loans, the Council may also finance capital expenditure and incur long-term liabilities by means of:

- leases
- Private Finance Initiative.

6.9. Borrowing strategy to be followed

With high levels of uncertainty and short-term interest rates currently close to long-term rates, it continues to be more cost effective in the short-term to not borrow and reduce the level of investments held instead, or to borrow short-term loans. However, with long-term rates not forecast to reduce in the near future, any such short-term savings will need to be balanced against potential longer-term costs.

If required, the council may arrange forward starting loans during 2026/27, where the interest rate is fixed in advance, but the cash is received in a later period.

7. Policy on Use of Financial Derivatives

- 7.1. Local authorities have previously made use of financial derivatives embedded into loans and investments both to reduce interest rate risk (e.g. interest rate collars and forward deals) and to reduce costs or increase income at the expense of greater risk (e.g. LOBO loans).
- 7.2. The Localism Bill 2011 includes a general power competence that removes the uncertain legal position over local authorities' use of standalone financial derivatives (i.e. those that are not embedded into a loan or investment). The latest CIPFA Code requires authorities to clearly detail their policy on the use of derivatives in the annual strategy.
- 7.3. The Council will only use standalone financial derivatives (such as swaps, forwards, futures and options) where they can be clearly demonstrated to reduce the overall level of the financial risks that the Council is exposed to. Additional risks presented, such as credit exposure to derivative counterparties, will be taken into account when determining the overall level of risk. Embedded derivatives will not be subject to this policy, although the risks they present will be managed in line with the overall treasury risk management strategy.

7.4. Derivative counterparties

Financial derivative transactions may be arranged with any organisation that meets the approved investment criteria. The current value of any amount due from a derivative counterparty will count against the counterparty credit limit and the relevant foreign country limit.

- 7.5. In reality, whilst the Council is required to include the above policy, the only type of transaction that might be used is the forward deal, which means the Council agrees to borrow funds at a set price for a set period, in advance of the date the loan is actually taken. This is done to ensure the availability of funds at the time that they are needed.

8. Treasury Management Prudential Indicators

- 8.1. The Council sets each year, in February, prudential indicators for Treasury Management, to ensure that proper control of borrowing and investing is maintained. These indicators have been updated to reflect the requirements in the 2021 Code and can be found in the Council's budget book.
- 8.2. To support the risk management of the capital financing requirement a graphical indication of the Council's borrowing liability and actual loans as a whole and for the General Fund and HRA is shown in Appendix B to this report.

9. Other Matters

The revised MHCLG Investment Guidance also requires the Council to approve the following matters each year as part of the investment strategy:

9.1. Investment consultants

The Council uses MUFG Corporate Markets as its external treasury management advisors.

The Council recognises that responsibility for treasury management decisions remains with the organisation at all times and will ensure that undue reliance is not placed upon the services of our external service providers. All decisions will be undertaken with regards to all available information, including, but not solely, our treasury advisers. The services received include:

- advice and guidance on relevant policies, strategies and reports,
- advice on investment decisions,
- notification of credit ratings and changes,
- other information on credit quality,
- advice on debt management decisions,
- accounting advice,
- reports on treasury performance,
- forecasts of interest rates, and
- training courses.

The quality of the advisory service is monitored by the Strategic Director Corporate Resources.

9.2. Training

The CIPFA Treasury Management Code requires the responsible officer to ensure that members with responsibility for treasury management receive adequate training in treasury management. This especially applies to members responsible for scrutiny. A knowledge and skills register for officers and members involved in the treasury management function should be maintained.

Furthermore, the Code states that they expect “all organisations to have a formal and comprehensive knowledge and skills or training policy for the effective acquisition and retention of treasury management knowledge and skills for those responsible for management, delivery, governance and decision making.

The scale and nature of this will depend on the size and complexity of the organisation's treasury management needs. Organisations should consider how to assess whether treasury management staff and board/ council members have the required knowledge and skills to undertake their roles and whether they have been able to maintain those skills and keep them up to date.

As a minimum, authorities should carry out the following to monitor and review knowledge and skills:

- Record attendance at training and ensure action is taken where poor attendance is identified.
- Prepare tailored learning plans for treasury management officers and board/council members.
- Require treasury management officers and board/council members to undertake self-assessment against the required competencies (as set out in the schedule that may be adopted by the organisation).
- Have regular communication with officers and board/council members, encouraging them to highlight training needs on an ongoing basis.”

In further support of the revised training requirements, CIPFA's Better Governance Forum and Treasury Management Network have produced a 'self-assessment by members responsible for the scrutiny of treasury management', which is available from the CIPFA website to download.

The Strategic Director Corporate Resources covers treasury management as part of the induction process. The needs of the Council's members and treasury management staff for training in investment management are assessed annually as part of the appraisal process, and additionally when the responsibilities of individual members of staff change. Staff regularly attend training courses, seminars and conferences provided by MUFG Corporate Markets and CIPFA.

A formal record of the training received by officers central to the Treasury function will be maintained by the Section 151 Office. Similarly, a formal record of the treasury management/capital finance training received by members will also be maintained by the Section 151 Office.

9.3. Investment of money borrowed in advance of need

The Council may, from time to time, borrow in advance of spending need, where this is expected to provide the best long-term value for money. Since amounts borrowed will be invested until spent, the Council is aware that it will be exposed to the risk of loss of the borrowed sums, and the risk that investment and borrowing interest rates may change in the intervening period. These risks will be managed as part of the Council's overall management of its treasury risks.

The total amount borrowed will not exceed the authorised borrowing limit. The maximum periods between borrowing and expenditure is expected to be two years, although the Council does not link particular loans with particular items of expenditure.

9.4. The Treasury Management Role of the Section 151 Office

- recommending clauses, treasury management policy/practices for approval, reviewing the same regularly, and monitoring compliance
- submitting regular treasury management policy reports
- submitting budgets and budget variations
- receiving and reviewing management information reports
- reviewing the performance of the treasury management function
- ensuring the adequacy of treasury management resources and knowledge and skills, and the effective division of responsibilities within the treasury management function
- ensuring the adequacy of internal audit, and liaising with external audit
- recommending the appointment of external service providers
- preparation of a capital strategy to include capital expenditure, capital financing, non-financial investments and treasury management, with a long-term timeframe (say 20+ years)
- ensuring that the capital strategy is prudent, sustainable, affordable and prudent in the long term and provides value for money
- ensuring that due diligence has been carried out on all treasury and non-financial investments and is in accordance with the risk appetite of the authority
- ensure that the authority has appropriate legal powers to undertake expenditure on non-financial assets and their financing
- ensuring the proportionality of all investments so that the authority does not undertake a level of investing which exposes the authority to an excessive level of risk compared to its financial resources
- ensuring that an adequate governance process is in place for the approval, monitoring and ongoing risk management of all non-financial investments and long term liabilities
- provision to members of a schedule of all non-treasury investments including material investments in subsidiaries, joint ventures, loans and financial guarantees
- ensuring that members are adequately informed and understand the risk exposures taken on by an authority

- ensuring that the authority has adequate expertise, either in house or externally provided, to carry out the above
- creation of Treasury Management Practices which specifically deal with how non treasury investments will be carried out and managed, to include the following
 - Risk management (TMP1 and schedules), including investment and risk management criteria for any material non-treasury investment portfolios
 - Performance measurement and management (TMP2 and schedules), including methodology and criteria for assessing the performance and success of non-treasury investments
 - Decision making, governance and organisation (TMP5 and schedules), including a statement of the governance requirements for decision making in relation to non-treasury investments; and arrangements to ensure that appropriate professional due diligence is carried out to support decision making
 - Reporting and management information (TMP6 and schedules), including where and how often monitoring reports are taken
 - Training and qualifications (TMP10 and schedules), including how the relevant knowledge and skills in relation to non-treasury investments will be arranged.

10. Investment Reports

10.1. The Council is currently required to receive and approve, as a minimum, three main treasury reports each year, which incorporate a variety of policies, estimates and actuals.

- a. **Prudential and treasury indicators and treasury strategy** (in budget book) - The first, and most important report is forward looking and covers:
 - the capital plans (including prudential indicators)
 - a Minimum Revenue Provision (MRP) policy (how residual capital expenditure is charged to revenue over time)
 - the Treasury Management Strategy (how the investments and borrowings are to be organised), including treasury indicators; and
 - an Annual Investment Strategy (the parameters on how investments are to be managed).
- b. **A mid-year treasury management report** – This is primarily a progress report and will update members on the capital position, amending prudential indicators as necessary, and whether any policies require revision.
- c. **An annual treasury report** – This is a backward-looking review document and provides details of a selection of actual prudential and treasury indicators and actual treasury operations compared to the estimates within the strategy.
- d. **Quarterly Treasury Management updates** – reports on progress and performance are not required to be reported to full Council and are included in the Scrutiny Bulletin.

Scrutiny

The above reports a) to c) are required to be adequately scrutinised before being recommended to the Council. This role is undertaken by the Executive Committee.

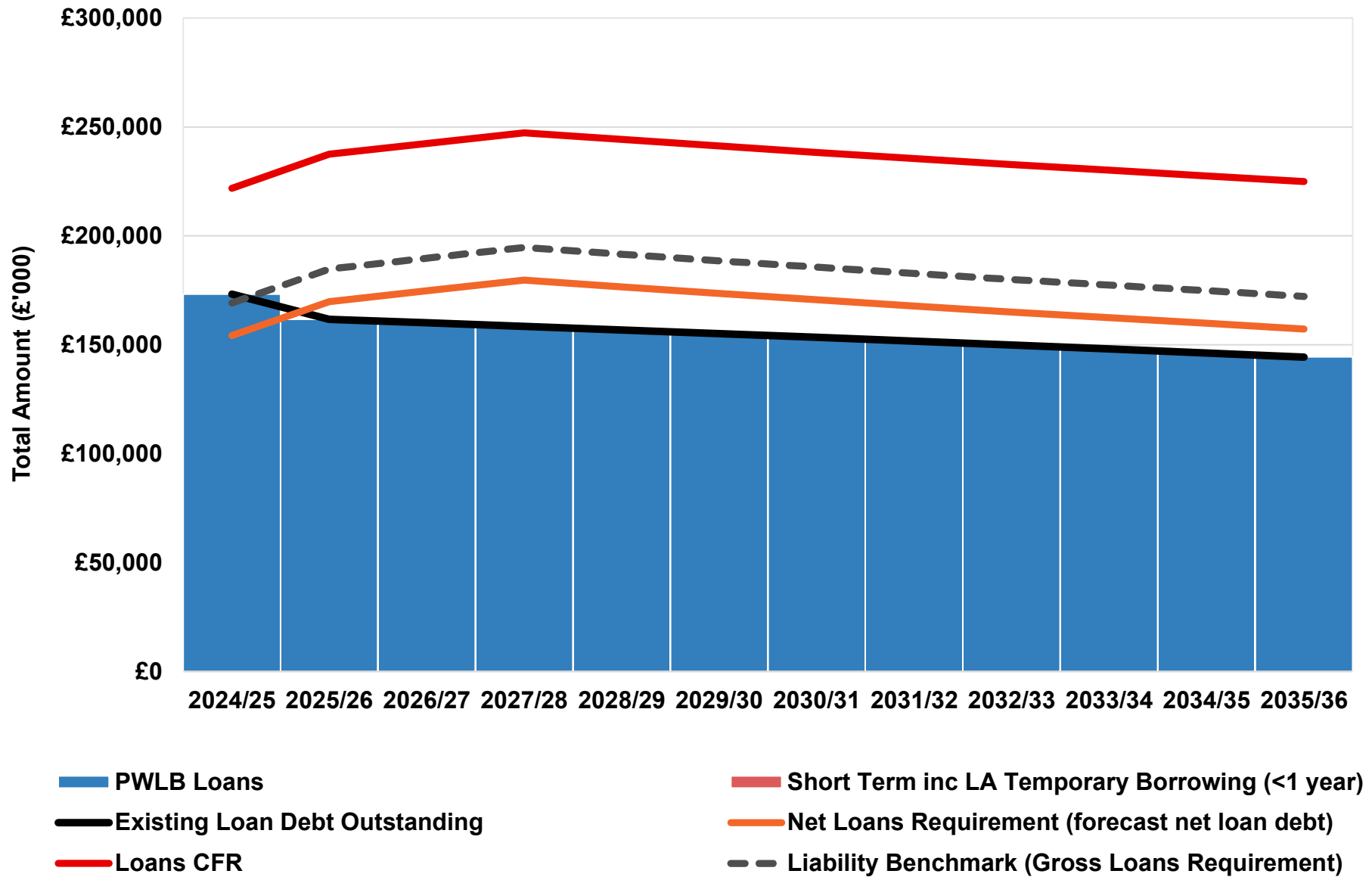
Quarterly reports

In addition to the three major reports detailed above quarterly reports are not required to be reported to Full Council so are circulated in the Councillors' Information Bulletin.

STRATEGIC DIRECTOR – CORPORATE RESOURCES & S151 OFFICER
JANUARY 2026

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Liability Benchmark (GF & HRA combined)



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REPORT TO EXECUTIVE

Date of Meeting: 3 February 2026

REPORT TO COUNCIL

Date of Meeting: 24 February 2026

Report of: Strategic Director – Corporate Resources & s151 Officer

Title: The Prudential Code for Capital Finance in Local Authorities (Incorporating the Annual Statement of Minimum Revenue Provision)

Is this a Key Decision?

No

Is this an Executive or Council Function?

Executive

1. What is the report about?

1.1 To set out the proposed 2026/27 Prudential Indicators for capital finance for adoption by the Council and set the annual statement of Minimum Revenue Provision (MRP).

2. Recommendations:

2.1 That Executive recommends that Council approves the adoption of:

- a) the Prudential Indicators set out in Appendices A-C; and
- b) the Annual Statement of Minimum Revenue Provision for the Council.

3. Reasons for the recommendation:

3.1 With effect from 1 April 2004, the Government abolished the capital finance legislation in Part 4 of the Local Government and Housing Act 1989 and the Local Authorities (Capital Finance) Regulations 1997 (Statutory Instrument 1997/319) and replaced it with a new prudential system based on self-regulation. This means that Councils are free to borrow for capital investment where the borrowing is affordable.

3.2 The Local Authorities (Capital Finance and Accounting) (England) Regulations 2003 as amended require Full Council to approve an Annual Statement of Minimum Revenue Provision which is the amount set aside from revenue for the repayment of debt principal relating to the General Fund only. The Housing Revenue Account remains exempt from making MRP although it can make voluntary set asides if it wishes.

3.3 The Prudential Indicators / MRP report will be incorporated within the Budget Book for approval at the full Council meeting as per the statutory requirement.

4. What are the resource implications including non-financial resources:

4.1 The financial resources required are set out in the body of this report.

5. Section 151 Officer comments:

5.1 These indicators reflect the impact on the revenue accounts of capital expenditure in both the General Fund and Housing as well as the impact across the Council as a whole. Members should pay particular attention to the Capital Financing Requirement (our underlying need to borrow), the Operational Boundary and the Authorised Limit (the maximum we can legally borrow).

6. What are the legal aspects?

6.1 With effect from 1 April 2004, the Government abolished the capital finance legislation in Part 4 of the Local Government and Housing Act 1989 and the Local Authorities (Capital Finance) Regulations 1997 (Statutory Instrument 1997/319) and replaced it with a new prudential system based on self-regulation. More detailed information is set out in paragraph 3 above.

7. Monitoring Officer's comments:

7.1 This report raises no issues for the Monitoring Officer.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal no potential impact has been identified on people with protected characteristics as determined by the Act because the report is for information only.

9. Carbon Footprint (Environmental) Implications:

9.1 No direct carbon/environmental impacts arising from the recommendations.

10. Report details:

10.1 The Prudential Code requires authorities to look at capital expenditure and investment plans in the light of overall organisational strategy and resources and ensure that decisions are being made with sufficient regard to the long-term financing implications and potential risks to the authority. Effective financial planning, option appraisal, risk management and governance processes are essential in achieving a prudential approach to capital expenditure, investment and debt.

The Authority's capital expenditure plans are the key driver of treasury management activity. The output of the capital expenditure plans is reflected in the prudential indicators, which are designed to assist members' overview and confirm capital expenditure plans.

This Authority must have regard to the CIPFA Prudential and Treasury Management Codes of Practice as updated in 2021 when preparing this report and the Treasury Management Strategy Statement which includes the Annual Investment Strategy.

10.2 Key issues to consider

Appendix C summarises the Prudential Code indicators for the Council and of particular importance are:

- The Capital Financing Requirement - demonstrates the amount that the Council has an underlying need to borrow, regardless of whether that amount has actually been borrowed.
- The Operational Boundary - this sets the amount of borrowing that the Council intends to keep within over the period covered by the indicators.
- The Authorised Limit - the maximum that the Section 151 Officer is allowed to borrow to cover the Operational Boundary and day to day cash flow needs. The Council is not allowed to exceed this amount of borrowing without first authorising an increase to the limit.

10.3 Lifting of the HRA Borrowing Cap

Since April 2012, each local authority had a limit on the amount of borrowing it could have for the purposes of the HRA, called the 'debt cap'. For Exeter City Council, the debt cap was £57,882,413.

The HRA debt cap was formally removed on 29 October 2018, as a result local authorities are now able to borrow for housebuilding in accordance with the Prudential Code.

The HRA have borrowed an additional £15.3m for the development of new sites since the debt cap was lifted. Further sites are being identified for the development of new council housing to make use of this new flexibility and to contribute to local housing delivery and further investigations by officers for further new sites are ongoing. However, given the current high interest costs and pressures on the HRA budget there is no provision in the current MTFP for new housing other than Vaughan Road.

10.4 Capital Financing Requirement

Within the range of prudential indicators there are a number of key indicators to ensure that the Council operates its activities within well-defined limits. One of these is that the Council needs to ensure that its gross debt does not, except in the short term, exceed the total of the CFR in the preceding year plus the estimates of any additional CFR for 2026/27 and the following two financial years. This allows some flexibility for limited early borrowing for future years but ensures that borrowing is not undertaken for revenue or speculative purposes.

The implementation of International Financial Reporting Standard 16 has resulted in more leases constituting capital expenditure. These assets will be accounted for as if they had been acquired and will increase the Capital Financing Requirement. It is important that the Council does not enter into any unauthorised leases or this may result in breaching the authorised limit.

The Strategic Director – Corporate Resources and s151 Officer reports that the Council complied with this Prudential Indicator in the current year and does not envisage difficulties for the future. This view takes into account current commitments, existing plans, and the proposals in this budget report.

10.5 ANNUAL STATEMENT OF MINIMUM REVENUE PROVISION

The Regulations require that "a local authority shall determine for the current financial year an amount of minimum revenue provision which it considers to be prudent".

Minimum Revenue Provision (MRP) is an amount set aside from revenue to meet the repayment of debt principal. It is in effect a replacement for depreciation that you would normally expect to see within a Company's Accounts. Under the old Regulations this was 4% of principal outstanding for the General Fund and no requirement to set aside MRP in the Housing Revenue Account. In local government accounting depreciation is charged and then reversed out so it does not affect the level of Council Tax, however MRP is charged to the General Fund and therefore does affect levels of Council Tax.

The Secretary of State for Communities and Local Government has issued guidance under section 21(1A) of the Local Government Act 2003. This states that "the broad aim of prudent provision is to ensure that debt is repaid over a period that is either reasonably commensurate with that over which the capital expenditure provides benefits, or, in the case of borrowing supported by Government Revenue Support Grant, reasonably commensurate with the period implicit in the determination of the grant."

The guidance notes detail five options which the Secretary of State considers prudent. These are described in section 10 below:

- (a) Regulatory Method;
- (b) Capital Financing Requirement Method;
- (c) Asset Life (Equal Instalment) Method;
- (d) Asset Life (Annuity) Method; and
- (e) Depreciation Method

10.6 Key issue to consider

Section 8.7 sets out the proposed policy for MRP, which matches the amount set aside against the useful life of the assets. The only exception to this is the writing off of historic debt which is being undertaken over 50 years.

10.7 MRP OPTIONS

Regulatory Method

MRP is equal to the amount determined in accordance with the former regulations 28 and 29 of the 2003 Regulations as if they had not been revoked. In effect this is 4% of the debt principal outstanding.

Capital Financing Requirement Method

MRP is equal to 4% of the non-housing Capital Financing Requirement, which is a Prudential Indicator.

Asset Life (Equal Instalment) Method

Where capital expenditure on an asset is financed wholly or partly by borrowing then MRP is determined by reference to the life of the asset and an equal amount charged in each year.

Asset Life (Annuity) Method

MRP is the principal element for the year of the annuity required to repay over the asset life the amount of capital expenditure financed by borrowing.

Depreciation Method

MRP is equal to the provision required in accordance with depreciation accounting in respect of the asset, including any amount of impairment chargeable to the Income and Expenditure Account. As standard depreciation rules are used where an asset is part financed by loan, e.g. 50% loan, 50% Capital Receipt, then the full 100% depreciation charge on the asset is required to be charged as MRP. MRP is required to be charged annually until the cumulative amount of the provision is equal to the original expenditure financed by borrowing. Should the asset be disposed of then the charge needs to continue as if the asset had not been disposed of unless the debt is repaid.

10.8 MINIMUM REVENUE PROVISION POLICY 2026/27

The Council's MRP policy is to match borrowing against specific capital investment and adopt either the Asset Life (Equal Instalment) or the Asset Life (Annuity) method for MRP. In this way the funding for the asset will be paid off over the useful life of that asset. This will ensure that loans are repaid over the asset life thus freeing financial resources for investment in other schemes or in asset renewal. They are also simple to operate and gives certainty in each year as to the level of charge for principal.

The other advantage is that it makes business cases and scheme appraisals easier to compile. As a general rule the Council will seek to borrow over the same period of the asset life up to a maximum of 50 years in line with the Regulations. The total capital financing requirement at the end of 2025/26 is likely to be approximately £237.477 million. The MRP for 2026/27 will be calculated based on the capital financing requirement at the end of 2025/26 using the varying periods of repayment. The MRP charge for 2026/27 will be approximately £3.084 million. For the avoidance of doubt, it is proposed to use both options from 2016/17 onwards, depending on the asset being financed. However, unless there is a good reason, for not doing so, all borrowing will adopt the Asset Life (Annuity) method.

10.9 MRP Overpayments

A change introduced by the revised MRP Guidance was the allowance that any charges made over the statutory minimum revenue provision (MRP), voluntary revenue provision (VRP) or overpayments, can, if needed, be reclaimed in future years if deemed necessary or prudent. In order for these sums to be reclaimed for use in the budget, this policy must disclose the cumulative overpayment made each year. There are currently VRP overpayments of £186,000 available to be used.

10.10 Capital Financing Requirement

Within the range of prudential indicators there are a number of key indicators to ensure that the Council operates its activities within well-defined limits. One of these is that the

Council needs to ensure that its gross debt does not, except in the short term, exceed the total of the CFR in the preceding year plus the estimates of any additional CFR for 2026/27 and the following two financial years. This allows some flexibility for limited early borrowing for future years but ensures that borrowing is not undertaken for revenue or speculative purposes.

Where the authority has acquired assets under leases, an MRP charge will be made for the amount by which the liabilities recognised for rents due over the remaining terms of the leases have been reduced by payments of rent in the financial year. The overall impact of this policy is that the annual charge against the General Fund balance for leases will be the rents payable for each financial year.

The Strategic Director – Corporate Resources and s151 Officer reports that the Council complied with this prudential indicator in the current year and does not envisage difficulties for the future. This view takes into account current commitments, existing plans, and the proposals in this budget report.

11. How does the decision contribute to the Council's Corporate Plan?

11.1 The Capital Programme contributes to all of the key purposes, as set out in the Corporate Plan.

12. What risks are there and how can they be reduced?

12.1 Areas of budgetary risk are highlighted to committee as part of the quarterly budget monitoring updates.

13. Are there any other options?

13.1 No

Strategic Director Corporate Resources & s151 Officer, David Hodgson

Author: Kayleigh Searle, Finance Lead - Capital

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

List of Appendices:

- Appendix A – Prudential Indicators – General Fund
- Appendix B – Prudential Indicators – HRA
- Appendix C – Prudential Indicators – General Fund and HRA combined

General Fund Prudential Indicator Calculations

The purpose of the prudential indicators is to demonstrate that the Council's financial plans meet the statutory requirement to be affordable, prudent and sustainable.

General Fund Capital Expenditure

The prudential indicator for capital expenditure should be based upon a capital programme that takes into account the Council's asset management and capital investment strategies.

Director	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Operations	5,344	13,218	19,304	2,432	150
Corporate	129	7,014	2,290	6,867	0
People & Communities	2,028	2,660	2,198	1,014	1,014
Place	933	2,973	3,721	1,554	100
Total General Fund Capital Expenditure	8,434	25,865	27,513	11,867	1,264

General Fund Financing costs

The figures for the actual financing costs will be taken from the Council's financial statements using the definition of financing costs specified in the Prudential Code. Estimates for the current and future years should be calculated in a manner consistent with this definition.

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Interest payable with respect to short term borrowing	1,132	1,173	1,253	1,199	1,199
Interest payable under 'irredeemable' long term liabilities	1,900	1,824	1,811	1,795	1,795
Interest and investment income	(1,755)	(1,348)	(1,664)	(1,564)	(1,464)
Replacement for Minimum Revenue Provision (England and Wales)	2,505	2,680	3,084	3,035	3,115
Voluntary contribution to financing costs in respect of short-life assets	(700)	0	0	0	0
Total General Fund Financing Costs	3,082	4,329	4,484	4,465	4,645

General Fund Estimates of the ratio of financing costs to net revenue stream

The net revenue stream is the estimate of the amounts to be met from government grants and local taxpayers.

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Financing costs	3,082	4,329	4,484	4,465	4,645
Net revenue stream	18,313	21,102	23,087	23,092	23,310
Ratio of financing costs to net revenue stream %	16.8	20.5	19.4	19.3	19.9
	%	%	%	%	%

General Fund Capital Financing Requirement

The Capital Financing Requirement will reflect the Council's underlying need to finance capital expenditure.

Actual General Fund Capital Financing Requirement at 31 March 2025

	£'000
Property, Plant and Equipment	183,789
Investment Properties	86,761
Heritage Assets	23,341
Intangible Assets / Other Long term Assets	4,168
Revaluation Reserve	(99,257)
Capital Adjustment Account	(49,514)
General Fund Capital Financing Requirement 31 March 2025	149,288

Estimated General Fund Capital Financing Requirement at 31 March 2025

General Fund Capital Financing Requirement 31 March 2025	149,288
Estimate of change in Property, Plant and Equipment	25,865
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(17,197)
Estimate of General Fund Capital Financing Requirement 31 March 2026	157,956

Estimated General Fund Capital Financing Requirement at 31 March 2027

Estimate of General Fund Capital Financing Requirement 31 March 2026	157,956
Estimate of change in Property, Plant and Equipment	27,513
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(22,597)
Estimate of General Fund Capital Financing Requirement 31 March 2027	162,872

Estimated General Fund Capital Financing Requirement at 31 March 2028

Estimate of General Fund Capital Financing Requirement 31 March 2027	162,872
Estimate of change in Property, Plant and Equipment	11,867
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(6,903)
Estimate of General Fund Capital Financing Requirement 31 March 2028	167,836

Estimated General Fund Capital Financing Requirement at 31 March 2028

Estimate of General Fund Capital Financing Requirement 31 March 2028	167,836
Estimate of change in Property, Plant and Equipment	1,264
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(4,380)
Estimate of General Fund Capital Financing Requirement 31 March 2029	164,720

HRA Prudential Indicator Calculations

Local authorities that have a Housing Revenue Account (HRA) are required to prepare separate calculations for their HRA and non-HRA elements.

HRA Capital Expenditure

The prudential indicator for capital expenditure should be based upon a capital programme that takes into account the Council's asset management and capital investment strategies.

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
INVESTING IN EXISTING STOCK	15,324	14,832	12,636	8,257	6,028
PROVISION OF NEW COUNCIL HOMES	7,079	4,586		0	0
Total HRA Capital Expenditure	22,403	19,418	12,636	8,257	6,028

HRA Financing costs

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Interest payable with respect to short term borrowing	0	0	0	0	0
Interest payable under 'irredeemable' long term liabilities	2,181	2,502	2,655	2,655	2,655
Interest and investment income	(1,061)	(800)	(795)	(745)	(745)
Voluntary Revenue Provision (England and Wales)	0	0	0	0	0
Voluntary contribution to financing costs in respect of short-life assets	0	0	0	0	0
Total HRA Financing Costs	1,120	1,702	1,860	1,910	1,910

HRA Estimates of the ratio of financing costs to net revenue stream

For the Housing Revenue Account the net revenue stream, for the purposes of the Code, is the amount to be met from rent income.

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Financing costs	1,120	1,702	1,860	1,910	1,910
Net revenue stream	21,994	22,111	23,102	23,795	24,509
Ratio of financing costs to net revenue stream %	5.1 %	7.7 %	8.1 %	8.0 %	7.8 %

HRA Capital Financing Requirement

The Capital Financing Requirement will reflect the Council's underlying need to finance capital expenditure.

Actual HRA Capital Financing Requirement at 31 March 2025

Description	£'000
Property, Plant and Equipment	322,526
Investment Properties	0
Intangible Assets / Other Long term Assets	0
Revaluation Reserve	(66,212)
Capital Adjustment Account	(183,072)
Actual HRA Capital Financing Requirement 31 March 2025	73,242

Estimated HRA Capital Financing Requirement at 31 March 2026

Actual HRA Capital Financing Requirement 31 March 2025	73,242
Estimate of change in Property, Plant and Equipment	19,418
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(13,140)
Estimate of HRA Capital Financing Requirement 31 March 2026	79,520

Estimated HRA Capital Financing Requirement at 31 March 2027

Estimate of HRA Capital Financing Requirement 31 March 2026	79,520
Estimate of change in Property, Plant and Equipment	12,636
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(12,636)
Estimate of HRA Capital Financing Requirement 31 March 2027	79,520

Estimated HRA Capital Financing Requirement at 31 March 2028

Estimate of HRA Capital Financing Requirement 31 March 2027	79,520
Estimate of change in Property, Plant and Equipment	8,257
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(8,257)
Estimate of HRA Capital Financing Requirement 31 March 2028	79,520

Estimated HRA Capital Financing Requirement at 31 March 2029

Estimate of HRA Capital Financing Requirement 31 March 2028	79,520
Estimate of change in Property, Plant and Equipment	6,028
Estimate of change in Investment Properties	0
Estimate of change in Intangible Assets / Other Long term Assets	0
Estimate of change in Revaluation Reserve	0
Estimate of change in Capital Adjustment Account	(6,028)
Estimate of HRA Capital Financing Requirement 31 March 2029	79,520

Limit on indebtedness

The HRA borrowing cap was limited to £57,882k, but the cap was formally removed on 29 October 2018 so Local Authorities can now borrow for housebuilding.

Prudential Indicator Calculations**PRUDENTIAL INDICATORS OF AFFORDABILITY****Total Actual / Estimates of Capital Expenditure**

The prudential indicator for capital expenditure should be based upon a capital programme that takes into account the Council's asset management and capital investment strategies.

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Total General Fund Capital Expenditure	8,434	25,865	27,513	11,867	1,264
Total HRA Capital Expenditure	22,403	19,418	12,636	8,257	6,028
Total Actual / Estimates of Capital Expenditure	30,837	45,283	40,149	20,124	7,292

Total Actual / Estimates of Financing Costs

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Total General Fund Financing Costs	3,082	4,329	4,484	4,465	4,645
Total HRA Financing Costs	1,120	1,702	1,860	1,910	1,910
Total Actual / Estimates of Financing Costs	4,202	6,031	6,344	6,375	6,555

Actual / Estimates of Ratio of Financing Costs to Net Revenue Stream

The net revenue stream is the estimate of the amounts to be met from government grants and local taxpayers, and for the Housing Revenue Account, is the estimate of the amounts to be met from rent income.

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
General Fund Ratio of Financing Costs to Net Revenue Stream	16.8	20.5	19.4	19.3	19.9
HRA Ratio of Financing Costs to Net Revenue Stream	5.1	7.7	8.1	8.0	7.8

The estimates of financing costs include current commitments and the proposals in this budget report.

Prudential Indicator Calculations**Actual / Estimates of Capital Financing Requirement**

The Capital Financing Requirement will reflect the Council's underlying need to finance capital expenditure.

Description	2024/25 Actual £'000	2025/26 Estimate £'000	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
General Fund Capital Financing Requirement	149,288	157,956	162,872	167,836	164,720
HRA Capital Financing Requirement	73,242	79,520	79,520	79,520	79,520
Total Actual / Estimates of Capital Financing Requirement	222,530	237,476	242,392	247,356	244,240

Authorised Limit

In England and Wales the prudential indicator for the Authorised Limit for external debt for the current year is the statutory limit determined under Section 3 (1) of the Local Government Act 2003: 'A local authority shall determine and keep under review how much money it can afford to borrow'

The Authorised Limit should not be set so high that it would never in any possible circumstances be breached. It should reflect a level of borrowing which, while not desired, could be afforded but may not be sustainable. The Authorised Limit must therefore be set to establish the outer boundary of the Council's borrowing, based on a realistic assessment of the risks.

Description	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Borrowing	305,000	305,000	305,000
Other long term liabilities	12,000	12,000	12,000
Authorised Limit	317,000	317,000	317,000

Prudential Indicator Calculations**Operational Boundary**

The Operational Boundary is the focus of day-to-day treasury management activity within the authority. It is a means by which the authority manages its external debt to ensure that it remains within the self-imposed Authorised Limit. The Operational Boundary may be breached temporarily on occasions due to variations in cashflow. However, a sustained or regular trend above the Operational Boundary would be significant and should lead to further investigation.

Description	2026/27 Estimate £'000	2027/28 Estimate £'000	2028/29 Estimate £'000
Borrowing	285,000	285,000	285,000
Other long term liabilities	10,000	10,000	10,000
Operational Boundary	295,000	295,000	295,000

The Authorised Limit and the Operational Boundary have been increased to include capacity to enable the establishment of a HRA development programme following removal of the debt cap.

Actual External Debt

The prudential indicator for actual external debt will not be directly comparable to the authorised limit and operational boundary, since the actual external debt will reflect the actual position at one point in time.

Description	2024/25 Actual £'000	To be repaid	
		within 12 months	after 12 months
Actual borrowing as at 31 March 2025	173,616	11,590	162,026
Actual long term liabilities as at 31 March 2025	4,123	1139	2,984
Actual External Debt as at 31 March 2025	177,739	12,729	165,010

Prudential Indicator Calculations
PRUDENTIAL INDICATORS OF PRUDENCE

Gross Debt and Capital Financing Requirement

The Code makes it necessary, if a financial strategy is to be prudent, that it is one in which in the medium term gross debt is only used for capital purposes. In the Code this requirement is to be demonstrated through a comparison of gross debt with the Capital Financing Requirement.

Description	£'000
Total Capital Financing Requirement at 31 March 2025	222,530

2025/26 Estimated Change in Capital Financing Requirement	
Capital expenditure	45,283
Application of useable capital receipts	(3,605)
Application of capital grants/contributions	(24,051)
The replacement for MRP	(2,680)
Additional voluntary contributions	0
Total Estimated Change in Capital Financing Requirement 2025/26	14,947

2026/27 Estimated Change in Capital Financing Requirement	
Capital expenditure	40,149
Application of useable capital receipts	(1,347)
Application of capital grants/contributions	(30,802)
The replacement for MRP	(3,084)
Additional voluntary contributions	0
Total Estimated Change in Capital Financing Requirement 2026/27	4,916

Prudential Indicator Calculations

2027/28 Estimated Change in Capital Financing Requirement	
Capital expenditure	20,124
Application of useable capital receipts	(2,000)
Application of capital grants/contributions	(10,126)
The replacement for MRP	(3,035)
Additional voluntary contributions	0
Total Estimated Change in Capital Financing Requirement 2027/28	4,963

Capital Financing Requirement:	
Opening Balance 2024/25	222,530
Estimated Closing Balance 2027/28	247,356
This is an increase over the three years of	24,826

Operational Boundaries to Exposure to Interest Rate Risks

Interest rate risk management is a top priority for local authority management. The setting of upper limits has the effect of setting ranges within which the Council will limit its exposure to both fixed and variable interest rate movements.

Description	2025/26 £'000	2026/27 £'000	2027/28 £'000
Total projected interest payable on borrowing	5,719	5,649	5,649
Total projected interest receivable on investments	(2,459)	(2,309)	(2,209)
Net Interest	3,260	3,340	3,440

Description	Upper Limit
Upper limit - fixed rates = 100%	100%
Upper limit - variable rates = 20%	20%

This means that the Chief Finance Officer will manage fixed interest rate exposure within the range 0% to 100% and variable interest rate exposure within the range 0% to 20%

Prudential Indicator Calculations

Operational Boundary to the Exposure Inherent in the Maturity Structure of Borrowings

This indicator is designed to be a control over the Council having a large concentration of fixed rate debt needing to be replaced at times of uncertainty over interest rates. The indicator is, in effect, a limit on longer term interest rate exposure and is set for the forthcoming year.

The analysis of borrowing by maturity used in the Code uses the same periods as that required in the local authority SORP.

Amount of projected borrowing that is fixed rate maturing in each period as a percentage of total projected borrowing that is fixed rate.

Period	Upper Limit	Lower Limit	Estimated debt maturity %		
			2025/26	2026/27	2027/28
Under 12 months	100%	0%	5%	5%	5%
12 months and within 24 months	20%	0%			
24 months and within 5 years	20%	0%			
5 years and within 10 years	20%	0%			
10 years and above	100%	0%	95%	95%	95%

Investments

Description	At 31/3/2025 £'000	2025/26 £'000	2026/27 £'000	2027/28 £'000
Long-term investments	6,785	5,000	5,000	5,000
Short-term investments	0	0	0	0
Cash and cash equivalents	19,307	33,000	25,000	20,000
Total Investments	26,092	38,000	30,000	25,000

REPORT TO EXECUTIVE

Date of Meeting: 3 February 2026

REPORT TO COUNCIL

Date of Meeting: 3 March 2026

Report of: Strategic Director for Corporate Resources

Title: Local Council Tax Support Scheme 2026/27

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 This report seeks Member's agreement on the Local Council Tax Support (CTS) scheme for working age residents for 2026-27.

Members are required to agree working age scheme rules annually

2. Recommendations:

2.1 That Executive RECOMMENDS to Council that the scheme in place for the current year continues for 2026-27.

3. Reasons for the recommendation:

3.1 There are no immediate financial or practical reasons to recommend changes to the existing scheme for 2026-27.

4. What are the resource implications including non-financial resources:

4.1 Council Tax Support caseload has remained virtually static over the past 12 months, with a small reduction in both pension age and working age cases. The scheme costs have risen in line with increases to the Council Tax charges each year.

5. Section 151 Officer comments:

5.1 There are no significant financial implications from approving the scheme as it stands.

6. What are the legal aspects?

6.1 Paragraph 5 of Schedule 1B to the Local Government Finance Act 1992 requires billing authorities to adopt a Council Tax Support scheme each year, no later than 11 March of the preceding financial year.

For enquiries please contact: democratic.services@exeter.gov.uk

7. Monitoring Officer's comments:

7.1 This report raises no issues for the Monitoring Officer.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal, no potential impact has been identified on people with protected characteristics as determined by the Act as no change to the current support scheme is being proposed.

9. Carbon Footprint (Environmental) Implications:

9.1 No direct carbon/environmental impacts arising from the recommendations.

10. Report details:

10.1 The Local Council Tax Support Scheme (CTS) was introduced from 1 April 2013 and reduces the Council Tax bill for low-income residents of working age, currently awarding £4.6m to 4300 households (2025/26 projection). It replaced the previous national Council Tax Benefit Scheme. For working age applicants, the scheme is determined by local policy and for pension age applicants it is a national scheme subject to prescribed legislation. The pensioner scheme supports a further 2650 households.

10.2 Exeter City Council's CTS scheme is a means tested scheme, largely based on the rules from Council Tax Benefit which it replaced. The means test used to determine entitlement is still closely tied to the Housing Benefit scheme.

10.3 From April 2024 the working age scheme has included a class of full support for relevant care leavers without a means test. Since April 2024, a total of 79 individuals has received support, with awards totalling £115,000 over the last 2 years.

10.4 In December 2025, 62% of households and 57% of expenditure on Council Tax Support was for working age customers.

10.5 The migration of working age claims to Universal Credit is due to complete before April 2026. 97% of our working age Council Tax Support households are now receiving Universal Credit, up from 65% one year ago.

11. How does the decision contribute to the Council's Corporate Plan?

11.1 The Council Tax Support scheme assists Exeter's people in their communities and neighbourhoods by helping low income residents meet their Council Tax liability. The Exceptional Hardship policy strengthens this support by ensuring that the scheme rules do not cause inadvertent hardship in individual cases.

12. What risks are there and how can they be reduced?

12.1 The current scheme of Local Council Tax Support is well known and understood. Retaining it in the current form presents little risk.

13. Are there any other options?

13.1 Changes can be made to the local scheme of support annually from 1 April, agreed by Council by 11 March. Proposed changes must be subject to a public consultation before adoption. Failure to agree a new scheme results in the retention of the current scheme by default.

Strategic Director for Corporate Resources, Dave Hodgson

Author: Chris Buckman, Benefits & Welfare Lead

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

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REPORT TO EXECUTIVE

Date of Meeting: 3rd February 2026

REPORT TO COUNCIL

Date of Meeting: 3rd March 2026

Report of: Strategic Director for People and Communities

Title: Consultation and Engagement Strategy

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 This report seeks approval for the adoption of the Consultation and Engagement Strategy 2026–2028 (Appendix A). The strategy sets out Exeter City Council's approach to understanding, consulting, and engaging with communities, ensuring that diverse voices are heard and integrated into decision-making. This report also summarises the findings of the public survey and engagement with VCSE sector (Appendices B and C) on the draft strategy and outlines changes in response to feedback received.

2. Recommendations:

2.1 That Executive recommends to Council approval adoption of the Consultation and Engagement Strategy 2025–2028, (Referred to in this paper as the Strategy)

3. Reasons for the recommendation:

3.1 The strategy provides a clear, principles-based framework for consultation and engagement, aligned with the Council's Corporate Plan. Survey feedback demonstrates broad support for the strategy's aims and principles, but also highlights areas for improvement, particularly around clarity, accessibility, trust, and inclusivity. Adopting the amended strategy will help ensure that engagement is meaningful, representative, and responsive to community needs.

4. What are the resource implications including non-financial resources:

4.1 Since February 2025 a new Consultation and Engagement Manager has been in post, helping to develop the strategy and guide consultation activity. Implementation of the Strategy will require officer time for training, monitoring, and delivery of engagement activities. Some additional resources may be needed to support non-digital and specialist large-scale engagement methods and to ensure accessibility for all communities. There is £120,000 allocated in the Customers and Communities service budget to deliver this work. This budget has already contributed to delivering large scale consultation, such as

the 2025 Residents survey and the Local Government reorganisation engagement activity.

5. Section 151 Officer comments:

5.1 There are no additional financial implications for Council to consider.

6. What are the legal aspects?

6.1 The purpose of the strategy is to support compliance with statutory consultation requirements and the Equality Act 2010.

6.2 The Strategy states that where there is a defined legal process for consultation, then those processes will be followed. However, these consultations will take into consideration the principles of the consultation and engagement strategy and the consultation charter.

7. Monitoring Officer's comments:

7.1 The Monitoring Officer has no additional comments.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal potential impact has been identified on people with protected characteristics as determined by the Act and an Equality Impact Assessment has been included in the background papers for Member's attention (Appendix D).

9. Carbon Footprint (Environmental) Implications:

9.1 No direct carbon/environmental impacts arising from the recommendations. However, the strategy encourages digital engagement where appropriate, which may reduce travel-related emissions.

9.2 Where travel is required, to ensure wider community engagement, lower carbon options will be the preferred option

10. Report details:

10.1 This section summarises the findings from the consultation process and outlines the recommended changes to the Consultation and Engagement Strategy 2025–2028. The strategy sits alongside the Consultation Charter, (which sets out corporate guidance - Appendix E), and outlines Exeter City Council's approach to improving how we understand, consult, and engage with communities, and other stakeholders, ensuring that diverse voices are heard and integrated into decision-making. It is informed by public survey results and engagement with the VCSE sector, with recommended changes made in response to feedback.

10.2 The areas for strategic focus outlined in the strategy are as follows:

10.2.1 Understand Communities: Use research, empathy mapping, and community data to gain meaningful insights and build trust.

10.2.2 Define Scope & Objectives of all Activities: Use data to create consistent, transparent processes and ensure community voices are central to decision-making.

10.2.3 Innovative, Inclusive and Representative Methods: Embrace digital platforms, go to where people are, and use workshops and community representation to reach diverse groups.

10.2.4 Prototype, Test & Improve: Foster a culture of learning, pilot new methods, and adapt based on feedback.

10.3 Equity, Empathy, Collaboration, Transparency, Trust, Flexibility, Co-Design, Accountability and Time are the core principles guiding all engagement activities. The strategy commits to meeting the Gunning Principles for fair consultation and aligns with the Central Government Civil Society Covenant.

10.4 Success will be measured continually and reported on annually by:

- number and diversity of consultations and participants;
- positive feedback and timely reporting;
- increased trust and sense of influence among residents;
- reduction in FOI requests and improved engagement outcomes.

10.5 The focus of the consultation was to gather in-depth qualitative feedback from VCSE representatives, as well as individuals and other stakeholders. One hundred community groups were invited to participate, and the Communities team also held several meetings with VCSE representatives outlining the strategy. In total 47 responses were received. This feedback is captured in the full detail report (Appendix C) and in the Summary of Feedback, which outlines the key themes and responses (Appendix B).

10.5.1 Whilst generally supportive and positive, (72% felt the strategy was relevant or very relevant to communities and stakeholders), consultation responses highlighted the need for clearer aims and purpose, greater clarity around the focus areas, more accessible language, stronger commitments to inclusion and representation, and clarity around which stakeholders the Strategy included. Respondents also emphasised the importance of addressing participation bias, digital exclusion, and ensuring that engagement methods were genuinely accessible to all parts of the community.

10.5.2 Key improvements made in response to this feedback:

Purpose and Aims

- Added a dedicated section detailing the purpose and aims of the strategy.
- Linked these aims to the wider work of the Council.

Definitions

- Defined what consultation and engagement mean in practice.
- Clarified that consultation and engagement are not equivalent to a referendum.
- Set clear expectations for these processes.

Focus Areas

- Increased detail in each focus area to show what will be done and how.
- Removed jargon and ensured clarity on how aims will be achieved.

- Assigned responsibility for delivering each focus area.
- Added an 'Expected Outcomes' section for each focus area.
- Reduced focus areas from five to four.
- Created a separate section on implementation, listing enablers.
- Strengthened partnership working with community groups.
- Added detail on improving representation through inclusive and equitable approaches.
- Addressed self-selection bias and outlined steps to reduce its impact.

Key Principles

- Expanded principles to include co-design and accountability.
- Changed 'inclusive' to equity for clearer commitment to representation.

References and Frameworks

- Added clarity on Gunning Principles and Civil Society Covenant.

Measures of Success

- Made success measures more meaningful for ECC and Exeter residents.
- Reduced emphasis on purely numerical metrics.
- Added measures on how people feel about involvement and representative feedback

10.5.3 These changes ensure the updated strategy is clearer, more inclusive, and more accountable to the needs and expectations of Exeter's communities, in response to the consultation feedback (Appendices B).

11. How does the decision contribute to the Council's Corporate Plan?

11.1 The strategy supports all of the Corporate Plan's priorities by ensuring that services reflect the needs and aspirations of Exeter's diverse communities. For example, it can help the Council understand concerns around community safety and experiences of Exeter's culture offer, as well as barriers that prevent access to essential services

12. What risks are there and how can they be reduced?

12.1 Risks include low participation, unrepresentative feedback, and failure to act on engagement outcomes. These can be mitigated by adopting the recommended changes, ensuring robust monitoring, and maintaining transparent communication with communities.

13. Are there any other options?

13.1 The Council could choose not to adopt the strategy or to adopt it without amendment. However, this would risk missing the opportunity to address community concerns and improve engagement practice.

Strategic Director for People and Communities, Jo Yelland

Author: Stephen Clayton

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

- Red Quadrant Report – Customer Intelligence at Exeter City Council (2023)

List of Appendices:

- Appendix A: Consultation and Engagement Strategy 2026–28
- Appendix B: Consultation and Engagement Strategy 2026-28 Summary of Feedback Themes and Responses
- Appendix C: Consultation and Engagement Strategy 2026-28 Full details Responses Report
- Appendix D: Consultation and Engagement Strategy 2026-28: EQIA
- Appendix E: Consultation Charter

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Consultation and Engagement Strategy 2026 - 2028



Exeter
City Council

Purpose

We are dedicated to creating a city where decisions reflect the voices of our communities. Listening and involving residents is not just a principle, it's the foundation to help shape services, neighbourhood priorities, and citywide priorities. Meaningful consultation and engagement enable us to understand diverse needs, build trust, and co-design solutions that improve quality of life for everyone. By embedding inclusion, transparency, and collaboration into every stage of this strategy, we ensure that community insight drives better, more responsive services and lasting change.

The consultation and engagement strategy will guide how we listen, consult and involve people. This, together with our [Consultation Charter](#), will help ensure that our consultation and engagement is meaningful, effective, and accountable across the Council.

It's fundamental to us that we build trust and confidence in our systems and processes if we want more people and communities to get involved in our consultation and engagement activities. A first step to building trust and confidence is to help people understand why we are consulting them, what we are consulting on, and what they can expect from us. We believe that setting key principles for best practice in this strategy and being accountable for meeting them, we will be able improve and deliver consistently good consultation and engagement activities.

Aims

- Make our consultation and engagement processes meaningful, consistent and insightful.
- Strive to deliver inclusive consultation and engagement activities, enabling better access and participation so everyone an opportunity to contribute.
- Be open and transparent with consultation and engagement activities to help increase trust and confidence.
- Increase accountability through a consistent and continually improving use of our consultation and engagement processes.

Where there's a defined statutory and legal process for consultations, then those processes will be followed. However, these consultations will take into consideration the principles of the consultation and engagement strategy and the consultation charter.

Who

By taking part in meaningful consultation and engagement activities, we want **everyone** in Exeter to feel included, heard, and able to shape the future of our city. For us, **everyone** means:



**Service
users**



**Exeter
residents**



Business



**People who
visit Exeter**



**People who
work in Exeter**



**Public sector
(e.g. local/national
government & agencies)**



**Voluntary, community &
social enterprise
organisations (VCSEs)**

What we mean by consultation and engagement

For this strategy, it's useful to distinguish what we mean by both consultation and engagement. Consultation is just one form of engagement but is typically focused on decisions or changes which the council is proposing or considering. [Local Government Association](#) states: "Consultation is technically any activity that gives local people a voice and an opportunity to influence important decisions. It involves listening to and learning from local people before decisions are made or priorities are set."

By contrast, engagement does not start and end when there are decisions or changes being considered. Engagement is an ongoing process which helps the council to continuously learn from communities, share information and ideas, and build deep and meaningful relationships with stakeholders.

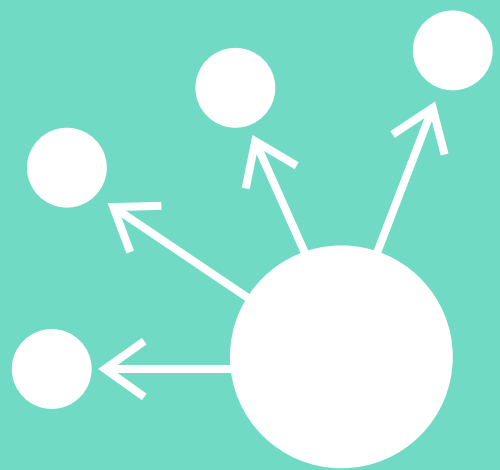
Levels of community involvement will vary depending on the nature of each consultation or engagement activity and what it is aiming to achieve. For example, some activities will be hyper-local, while others will be city-wide, which may lead to differing levels of involvement and different methods of data/ information collection.

To help explain the potential for different levels of involvement, public bodies developed the 'ladder of public engagement' concept which we have adapted and presented below.



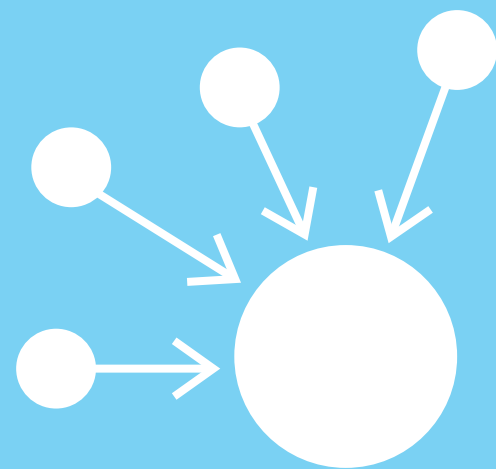
Increasing levels of community engagement

Page 159



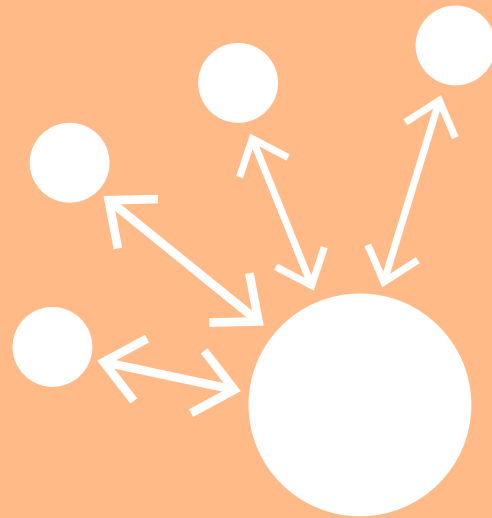
Inform

Provide people and communities with balanced and objective information about our services and decisions we take about those services



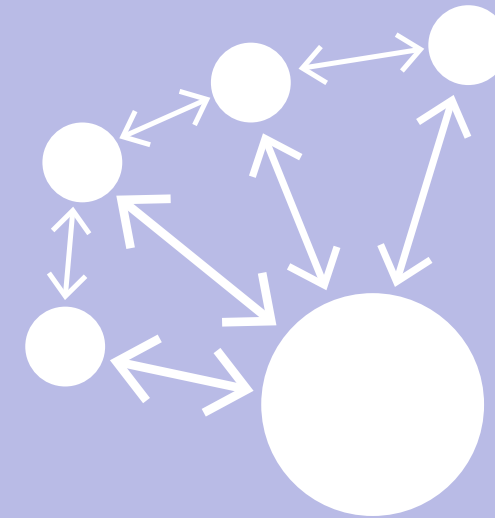
Consult

Gather and deeply consider feedback and input on issues, ideas and decisions taken about our services so we understand community views



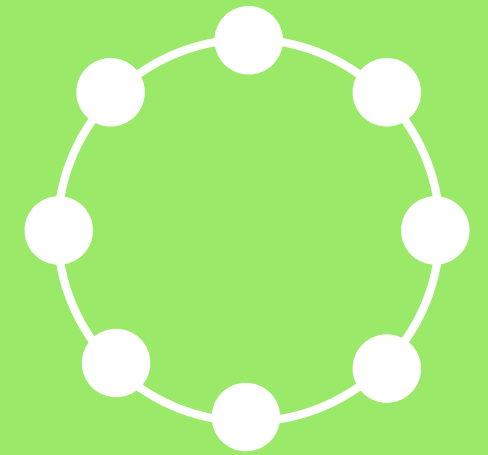
Involve

Work directly with communities to understand issues, needs and aspirations to ensure they are reflected in the development of service options and our decisions



Collaborate

Work in partnership with communities, sharing the decisions taken to change, improve or design new services and programmes, embedding partnership working in all decisions



Empower

The community owns change, and the council is a stakeholder to help implement that change – the community can create and deliver services and programmes

A green-tinted photograph of a busy city street. Pedestrians are walking across the street, and buildings line the background. The text is overlaid in white, bold font.

**Four focus areas to help us
achieve the purpose and
aims of our consultation
and engagement strategy**

1

Understand Communities in Exeter

What we'll do

- Implement a continuous 'Community Insight' programme that generates qualitative and quantitative evidence about needs, preferences, barriers, and assets across Exeter's wards and neighbourhoods.
- Develop a citywide 'Voices Index' that tracks and highlights representative resident voice and identifies gaps (e.g. digitally excluded, young people, older residents, carers, disabled residents, minority language speakers).
- Work closely with all stakeholders to increase our visibility and trust in our methods and approaches to consultation and engagement.

How we'll do it

- **Use mixed-methods research:** surveys & quick-polls (online + paper), interviews (telephone & face-to-face), focus groups, ethnography, empathy mapping, workshops.
- **Broad engagement tools:** youth forums, use social & traditional media, college/ university partnerships, healthcare provider partnerships, daytime, evening & weekend sessions, large-print options, audio and visual information.
- **Amplify voice of rarely heard from groups:** use interpreters when appropriate, work with community builders, supply refreshments at events, run child friendly events.
- **Utilise existing data & links:** work closely with internal teams (e.g. housing) and partner with community groups and organisations to share insights and community mapping, as well as access to a broad range of service users.

Expected Outcomes

Running a continuous programme of engagement will support us to:

1. *Gather data and insights to support more effective and targeted consultation and engagement activities*
2. *Form stronger, trusting working relationships with communities, groups, and organisations in the city*

2

Define Scope & Objectives of All Activities

What we'll do

- Align consultation and engagement activities to the Corporate Plan 2025–2028 priority areas and statutory requirements (e.g. for housing, commercial assets, etc), prioritised by urgency of need and impact on residents.
- Ensure that the objectives of consultation and engagement activities are always clear.
- Strive to hear diverse community voices that are proportionately weighted to visibly influence decisions the Council makes.
- Build consistency, buy-in, and ownership of consultation and engagement activities across Exeter City Council services.

How we'll do it

- **Forward planning:** publish annual roadmap detailing planned consultations and linking to the Corporate Plan.
- **Equality impact assessments:** each consultation activity will have an EQIA completed prior to launch, highlighting residents most impacted by potential change and guiding how we will engage with them.
- **Consistent communication standards:** accessible plain-English summaries, further information, visual storytelling, short audio versions, translations.
- **ECC governance:** cross-service Consultation & Engagement group meet regularly to review consultation plans, risks, and evaluation/ reporting.
- **Regular reporting:** accessible reporting with community voices front and centre (e.g. 'you said—we did') – targeting 12-weeks after the end of a consultation.

Expected Outcomes

Defining the scope and objectives of all consultation and engagement activities, will help us to:

1. *Clearly demonstrate our body of work in this area, setting realistic expectations for residents and increasing transparency and trust in our processes.*
2. *Increase and improve accountability for consultation and engagement activities across all ECC service areas.*

3

Innovative, Inclusive & Representative Methods

What we'll do

- Embrace innovation to help us reach more people continuously, in ways they want and expect.
- Reach a more diverse range of people and communities through consultation and engagement.
- Share best practice across the whole of ECC and engage with partners outside of ECC to learn from them.
- Enhance the confidence and power of community voices, encouraging active citizenship.
- Deliver consultation and engagement work that is representative of Exeter's population, so we don't just hear the loudest voices.
 - where capacity and allocation of funding allow (e.g. resident survey)

How we'll do it

- **Maintain & develop Engage Exeter:** a single online home for all consultation and engagement activities, but with awareness that 'online' is not for everyone.
- **Go to where people are:** pop-up engagement (markets, libraries, sports fixtures) and partnerships with, community spaces, ECC places and local institutions.
- **Creative options for feedback:** scenario labs, world café formats, priority voting tools - combining in-person with online participation.
- **Community representation:** recruit members to join existing community panels (youth, older adults, disability, carers, renters, minority language speakers); and explore peer research models.
- **Look to the future:** constantly explore new ways to support and improve participation and equity in our work.

Expected Outcomes

Adopting innovative, inclusive and representative methods for consultation and engagement, will help us to:

1. *Improve the reach and diversity of voice in our consultation and engagement work to support decision making processes.*
2. *Offer involvement processes that residents want and expect, now and in the future.*

4

Prototype, Test & Improve

What we'll do

- Introduce a test and learn culture for consultation and engagement work across ECC service areas – if mistakes are made, they are owned, communicated and learnt from.
- Openness and transparency in our work and methods and processes we use for consultation and engagement work.
- Evaluate processes and methods to understand what works and adapt them to meet shifting needs.

How we'll do it

- **Pilot method 'sprints'**: run small scale and focused engagement activities which have clear success metrics with the potential to scale.
- **Robust feedback opportunities**: run participant experience surveys (paper/phone/online), and community retrospectives related to consultation and engagement activities – sharing findings with ECC service areas and participants.
- **Review & Adapt**: Yearly method reviews and updates; publish 'What we tested / What we changed' report.
- **Open learning**: host 'lunch and learn' sessions and share case studies internally and with partners to spread effective practices for consultation and engagement activities.

Expected Outcomes

Testing, prototyping and improving our consultation and engagement methods and process, will help us to:

1. *Be able to identify areas for continuous improvement.*
2. *Strive for improvements in transparency, to improve trust in our methods and processes.*

Enablers

To be successful in implementing this strategy and improving our consultation and engagement activities, we have identified the following enablers:

- **Accountability:** All ECC service areas are accountable in achieving the four focus areas of the strategy to improve consultation and engagement activities.
 - *The strategy will work in tandem with the [Consultation Charter](#) – increasing expectations of consultation delivery and accountability*
- **Launch & Embed:** Publish the strategy in multiple formats (web, print, audio) both internally and externally to raise awareness and maintain its relevance to our work.
- **Monitor & Adapt:** Develop robust data monitoring tools such as dashboards and hold regular check-ins during active consultation and engagement activities.
- **Capability Building:** The strategy is ambitious, so to meet that ambition we will train staff in co-design principles, research methods, inclusive facilitation, plain-English writing, accessibility standards, and trauma-informed approaches.
- **Benchmarking:** We will compare our outputs and progress in our drive to improve consultation and engagement activities with other local authorities, sharing best practice.
- **Partnerships:** Explore formal Memorandum of Understanding (MOUs) with key partners to share venues, communication channels, interpreters, and data standards.

Implementing the consultation and engagement strategy



Key principles and ways of working to help us meet the aspirations of our four focus areas

Empathy

We enter consultation and engagement work with this mindset and prioritise understanding and addressing the community needs and concerns. We don't consider ourselves as the experts

Equity

We make our consultation and engagement activities equitable, so we hear diverse views and opinions to avoid self-selection bias. We are open to learning opportunities to improve inclusive practices

Collaboration

We strive to always involve diverse stakeholders, including residents, community organisations, community groups, and local businesses.

Co-Design

When and where appropriate, we will co-design with residents and communities to we work in partnership and embed user voice into our work and services.

Transparency

Ensure clear communication about our consultation and engagement processes, the topics we are exploring, and how community input will be used.

Time

Awareness of time needed to build strong relationships and links to ensure that we are building an accurate and representative picture of communities in Exeter.

Trust

Following these principles overtime will foster trust until it becomes the foundation of our consultation and engagement work.

Flexibility

Be adaptable and open to changing the strategy, methods, and approaches based on feedback and new insights.

Accountability

We are strong with the accountability for delivering on this strategy across all ECC service areas, and report to residents with clarity and humility.

Satisfy the Gunning Principles

The Gunning Principles form an important pillar of our Consultation Charter and so are very relevant to this strategy. Delivering on the four focus areas of this strategy, meeting our key principles, and improving our ways are all aspiration that will take us past satisfying the Gunning Principles – however this does not mean they should not be used and referred to when holding us account for our consultation activities.

The Gunning Principles are:

1. Proposals are still at a formative stage.
2. There is sufficient information to give ‘intelligent consideration’.
3. There is adequate time for consideration and response.
4. ‘Conscientious consideration’ must be given to the consultation responses before a decision is made.

[The Gunning Principles can be viewed in full](#)

Link to Central Government Civil Society Covenant

This is a new agreement to improve and reset the relationship between civil society and government. As this Covenant evolves over time, we will work to ensure that we use it to improve our consultation and engagement activities, enhance and strengthen our working relationships with stakeholders in Exeter, and improve shared learning.

The key principles of the Civil Society Covenant are:

- **Recognition:** To ensure a strong and independent civil society.
- **Partnership:** to ensure effective service delivery and policy making, and shared learning of best practices.
- **Participation:** to ensure people and communities can be heard and make a difference.
- **Transparency:** to ensure civil society and government have the information needed to best serve people and communities.

[More information regarding the Civil Society Covenant](#)

Measuring Success

How much

- Increase in the number of people taking part in consultations
- Increase in diversity of participant voice
- Increase in representative participation
- Increase in activities linked to community engagement across ECC
- Increase meaningful attendance at activities linked to community engagement

How well

- Increase in positive feedback from those we consult and engage with
- Increase in ‘on time’ public reporting and feedback to participants
- Reduction in Freedom of Information requests linked to consultations
- Residents feel safe and supported to participate in consultation and engagement activities

How connected

- Increase in people feeling like they have a say
- Increase in number of people who feel listened to and respected
- Increase in the number of people who have trust in the council’s consultation and engagement processes
- Increased partnership working with all stakeholders

Tell us what you think



We have put a lot of thought into this strategy and have incorporated changes based on feedback received after a 6-week public consultation. However, the strategy will be reviewed so that we can aim to continuously improve consultation and engagement activities in Exeter. We are open to ideas and suggestions for improvement. If you have any comments or suggestions, please get in touch with us using the contact details.

This strategy is about driving improvement and making sure that people have a voice on the issues that affect them and can help shape services, neighbourhood priorities, and citywide priorities.



[Contact Us](#)



[Engage Exeter](#)

Consultation Feedback Summary of Themes and Responses

Introduction.

This summary provides an overview of the key themes identified through the consultation on the Draft Consultation & Engagement Strategy, conducted between 23 October and 18 December 2025. It explains how the insights gathered have informed and shaped the final Consultation and Engagement Strategy 2026–28, ensuring clear alignment with the priorities and concerns expressed by residents, partners, and stakeholders. In total, 47 survey responses were received through targeted outreach to more than 100 VCSE organisations, supplemented by several face-to-face conversations and a member briefing, offering a broad and representative range of perspectives on how consultation and engagement should operate across the city.

Overall, respondents expressed positive support for the strategic direction, and the qualitative feedback—often rich, thoughtful, and detailed—was analysed to identify common themes and areas for improvement. These insights have directly contributed to strengthening the final strategy, ensuring it reflects best practice, supports trust-building across communities, and responds meaningfully to the issues raised throughout the consultation process.

Summary of Feedback Themes

1. Clarity of Purpose, Aims and more detail around how aims will be met
2. Plain-English Communication and Accessible Explanations
3. Inclusivity, Representation and Reaching Seldom-Heard Groups
4. Building Trust and Demonstrating Accountability
5. Early, Ongoing and Deeper Engagement
6. Stronger Partnership Working
7. Methodological Rigour and Representativeness
8. Consistency Across All Council Services

How the Strategy Responds to These Themes

The Consultation and Engagement Strategy 2026–28 incorporates a range of features and commitments that directly align with, and respond to, the themes identified during the consultation process.

1. Clarity of Purpose, Aims and Detail on Delivery

The Strategy sets out a clear Purpose that explains the importance of consultation and engagement, how these processes shape services and priorities, and how they contribute to building trust and improving quality of life across the city. It outlines four aims focused on meaningful, inclusive, open and accountable practice.

A dedicated section defines consultation and engagement, drawing on Local Government Association definitions and an adapted Ladder of Public Engagement.

The Council has reduced the number of focus areas from five to four and added a separate section describing how the Strategy will be implemented, including the key enablers required.

Each focus area now provides clearer detail on the actions the Council will take and how these will be delivered. An Expected Outcomes subsection has also been added to show what each focus area is intended to achieve.

The key principles have been expanded to include co-design and accountability, emphasising the Council's commitment to working collaboratively with communities.

While these principles are explained in greater depth, they are not the primary focus. By delivering the Strategy's aims through the four focus areas, the Council will naturally meet the Gunning Principles and embed the Civil Society Covenant across all community-facing activity.

2. Accessible and Plain-English Communication

The Strategy incorporates communication standards that include plain-English summaries, visual storytelling, audio and translated materials, accessible formats, and consistent explanations of scope and objectives.

3. Inclusive and Representative Approaches

The Strategy commits to mixed-methods research, the use of interpreters, accessible events, outreach in community spaces, Equality Impact Assessments, and a commitment to identifying under-represented groups, all within a framework of ongoing Community Insight development.

The Council has also replaced the term inclusive with equity to provide greater clarity regarding its commitment to improving representation and diversity in user voice.

4. Trust, Transparency and Accountability

Trust is one of the Strategy's core principles and is supported by transparent reporting, clear communication of how public input will be used, strengthened governance arrangements, application of the Consultation Charter, and alignment with the Gunning Principles.

5. Early, Ongoing and Deeper Engagement

The Strategy clearly distinguishes between consultation and engagement, emphasising that engagement is an ongoing process. The ladder of involvement (inform, consult, involve, collaborate, empower) provides clarity, alongside the Consultation Charter, which supports a proportionate approach to consultation activity.

6. Partnership Working

Partnership working has been strengthened across the Strategy, including collaboration with VCSE organisations, community groups, businesses, public sector partners and education institutions.

7. Rigour, Reliability and Mitigating Bias

The Strategy commits to mixed research methods, proportional representation where feasible and appropriate, continuous insight gathering, regular review and adaptation, and a test-and-learn approach.

The Council has also addressed the issue of self-selection bias and set out how it will work to reduce the potential impact of this on consultation findings.

8. Consistency Across Council Services

The Strategy clearly identifies responsibility for delivering each focus area.

Corporate ownership is embedded through cross-service governance, annual roadmaps, staff training, monitoring tools, benchmarking and shared accountability.

9. Meaningful Measures of Success for Residents and the Council

The Strategy reduces the emphasis on purely numerical success measures. While quantitative indicators remain important, the Council has added additional measures

relating to resident experience, perceptions of involvement and levels of representative feedback.

Success measures are defined across three dimensions:

How much: participation levels, diversity and representative involvement.

How well: quality of feedback, timeliness of reporting and participant experience.

How connected: sense of influence, feeling listened to, trust and partnership working.

Conclusion

The Consultation and Engagement Strategy 2026–28 provides a comprehensive response to the themes identified through consultation. It sets out a structured, principles-led and organisation-wide approach that emphasises inclusion, accessibility, transparency, rigour and partnership working. The Strategy establishes clear expectations for meaningful and consistent involvement of communities across all Council services.

Draft Consultation and Engagement Strategy

RESPONSE REPORT – FULL DETAIL

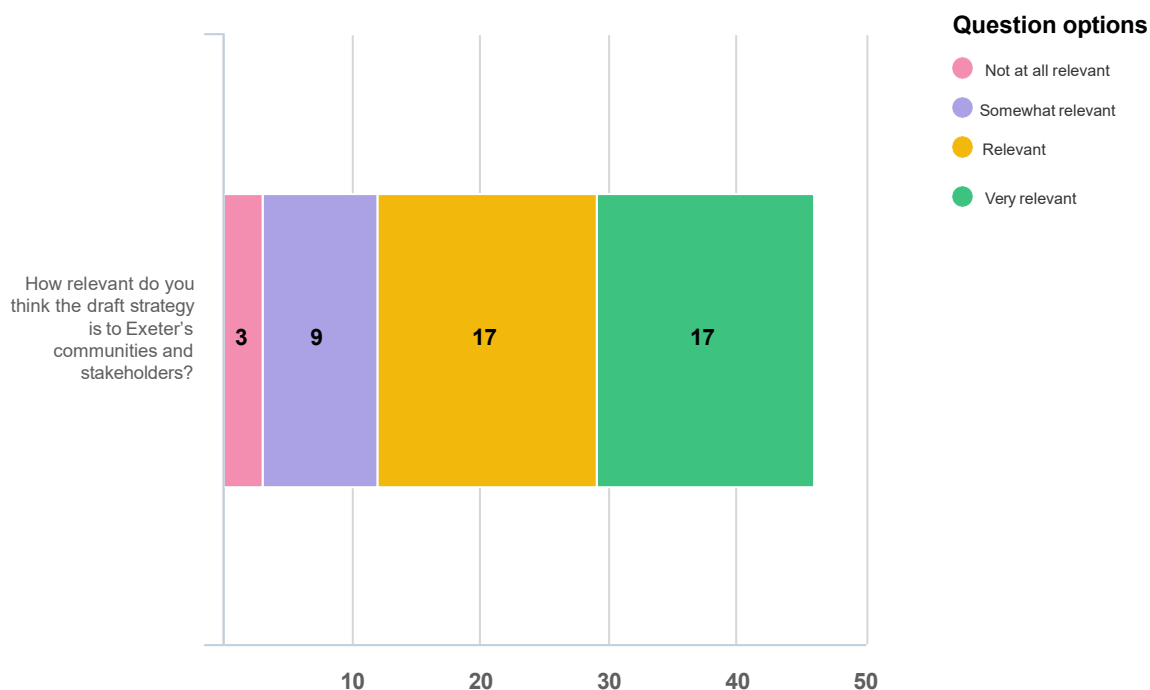
23 October 2025 - 11 December 2025

PROJECT NAME:

Consultation & Engagement Strategy

SURVEY RESPONSES

Q1 | Purpose and Aims



Mandatory Question (46 response(s))

Question type: Likert Question

Q1 | Purpose and Aims

How relevant do you think the draft strategy is to Exeter's communities and stakeholders?

Not at all relevant : 3

Somewhat relevant : 9

Relevant : 17

Very relevant : 17

2 4 6 8 10 12 14 16 18

Q2 | In what way do you think the it could be improved or strengthened?

Screen Name Redacted

10/23/2025 01:11 PM

Listen to all people

Screen Name Redacted

10/23/2025 04:13 PM

Commit to a mechanism allowing the 'community' to request a consultation topic not on the current council agenda.

Screen Name Redacted

10/23/2025 04:26 PM

I moved to Exeter in April 2025. I have not seen any notices that there is a neighbourhood watch group in the area.

Screen Name Redacted

10/23/2025 04:50 PM

Close scrutiny is required over time to ensure that group or sectoral contributions, political or polarized, are not submitted as mass individual responses to imbalance the Councils considerations of the issues presented. Such as might have occurred with planning consultations.

Screen Name Redacted

10/24/2025 01:21 AM

Ensure consultation responses are both accessible and demographically representative

Screen Name Redacted

10/24/2025 09:31 AM

The principles are fine, it will be in the delivery. How will you know you have found the most excluded and unheard from individuals and groups. In what ways will you as a council change your approach from previous consultations to ensure you are approachable and really listening to communities voices.

Screen Name Redacted

10/24/2025 03:21 PM

Turning up the volume on the smaller voices and encouraging active citizenship and co-creation, where communities actively shape outcomes, not just respond to proposals.

Screen Name Redacted

10/25/2025 12:37 PM

Making the statements clearer & more concise

Screen Name Redacted

10/30/2025 01:09 PM

Be prepared to be flexible and to listen to what residents have to say are their priorities, not necessarily the targets that you want to achieve.

Screen Name Redacted

10/31/2025 02:52

Reaching out to disability groups in the local area especially to those individuals who are challenged by online technology

Screen Name Redacted

10/31/2025 05:03 PM

By saying what will be actually be done rather than having a long list of management speak and waffle.

Screen Name Redacted

11/01/2025 01:01 PM

ECC has lost a lot of trust from Exeter residents in recent years and there seems to be a huge bias and discontentment around local politicians and what the residents feel is best for their city. The strategy needs to focus on building up trust and listening and being more transparent. Not sure if this strategy does that.

Screen Name Redacted

11/02/2025 07:46 PM

Publicise as you are already doing

Screen Name Redacted

11/03/2025 11:37 AM

I think you need to spell out purpose and aims. There isn't a point in the document or on the supporting webpage where you explicitly say "purpose" or "aims". I can see from the slide deck that "The five areas of strategic focus: what they are and how they can be achieved" would be the aim of the document, but I'm not sure everyone will understand that.

Screen Name Redacted

11/03/2025 02:26 PM

I think you would engage more people by responding to their concerns and desires for the city. It's good to want to engage people but there needs to be a section on "what comes next" post engagement - what is the benefit of engaging

Screen Name Redacted

11/03/2025 02:59 PM

There's a lot of emphasis on ensuring communities / people are consulted. This is of course important and central to this strategy. I would have liked to see some reference to how the consultation process enables the council to deliver on their agreed strategies and political manifesto commitments. i.e. we elect our political leaders with a mandate and we have strategies in place and agreed. The consultation process shouldn't really be a means of subverting or halting these. The consultation process should really be a means of improving the delivery, with citizen input, of these agreed strategies and political commitments

Screen Name Redacted

11/04/2025 01:45 PM

They are good, the importance of the Gunning principles resonates throughout the strategy.

Screen Name Redacted

01:34 PM

The aims look great, but they need to be actually implemented (unlike the 11/05/2025 consultation charter)

Screen Name Redacted 11/06/2025 08:02 AM	cOMMUNICATION
Screen Name Redacted 11/06/2025 06:05 PM	The Jigh Street could be more vibrant with more retail units if the rents were reduced.
Screen Name Redacted 11/07/2025 02:17 PM	More specific in nature
Screen Name Redacted 11/07/2025 03:22 PM	collect diverse feedback and experiences from all arts organisations, big and small that work in Exeter.
Screen Name Redacted 11/08/2025 10:43 PM	I don't actually know what the purpose and aims of the strategy are. Where are these listed in the strategy document? I can find fiffive areas of strategic focus but not the aims. You need to use consistent language.
Screen Name Redacted 11/10/2025 05:40 PM	You haven't stated what the Aims or Purpose are, that I can find on your website or the document itself, so I guess that would be a strong place to start. There's How and What, but no Why.
Screen Name Redacted 11/20/2025 10:21 AM	Really good aims. It may just be embedding these aims that is the challenge. Communicating them well, ensuring they are a part of everyone's workplan, ensuring everyone knows and feels that engagement is vital.
Screen Name Redacted 11/21/2025 11:52 AM	As a tool, it will only work with people who interact - there is a whole subset that ignore any municipal information completely. The results therefore will be biased towards those responses.
Screen Name Redacted 11/21/2025 11:56 AM	Nees to make it more simplified and in a way that reflects the majority of Exeter's residents. To the majority of the residents it's all gobbledygook. It appears weighted in the favour of the local authority. Just listen, pure and simple. Get out of your offices and listen. And do the job expected rather than seek confirmation over everything you.
Screen Name Redacted 11/21/2025 08:41 PM	I think you need to tailor your strategies to the best way to use the funding you have. All of the people, all of the time, getting what they want is not viable. You need to strategize to find out how much you can do realistically with the funding you have.

Screen Name Redacted

11/24/2025 05:48 PM

I couldn't see any section in the strategy document called purpose and aims, and was therefore unable to answer question 1 or this question. Only clicked 'somewhat relevant' in order to move to other questions

Screen Name Redacted

12/02/2025 05:51 PM

By actually doing what the strategy says. By reimbursing people for their time, effort and lived experience. By consulting right at the start before planning begins.

Screen Name Redacted

12/02/2025 05:57 PM

Emphasise use of established tools, e.g. online survey platforms, and processes which work in other parts of the country or are recommended by central government. This is to reduce effort, provide good facilities that people will use repeatedly and increase the value of feedback obtained.

Screen Name Redacted

12/02/2025 11:28 PM

I have two main comments about areas where I think the strategy could be strengthened. 1. Mitigating "Participation Bias" and Self-Selection The current draft mentions the need for diverse viewpoints, but the use of surveys and a digital engagement platform will suffer from inherent "participation bias." Surveys capture the views of those with the most time or the strongest grievances, while failing to hear from the "silent majority" (working families, younger people, and those supportive of change but too busy to engage). To strengthen the Strategy, the Council must differentiate between "Open Consultation" and "Representative Engagement." Specifically: Commit to Representative Sampling: For major strategic decisions (e.g., transport changes or spatial planning), the strategy should mandate the use of professional market research (polling) with demographic quotas (age, geography, tenure) to establish a statistically accurate baseline of public opinion. Demographic Weighting: When reporting on engagement results, the Council should commit to comparing participant demographics against Census data. If a specific group (e.g., under-30s or renters) is underrepresented, this must be explicitly highlighted in the decision-making reports. Sortition (Citizens' Panels): To capture genuine "lived experience" without self-selection bias, the Strategy should consider pilot schemes for Citizens' Juries or panels selected by lottery. This ensures the Council hears from a cross-section of Exeter, not just established pressure groups. 2. Clarifying the Purpose of consultation: Data vs. Referendum The Strategy should explicitly state that consultation is a process of qualitative intelligence gathering, not a quantitative referendum. There is a danger that the public views consultation as a "vote," leading to disillusionment when a proposal proceeds despite numerical opposition. The text should clarify that the goal of consultation is to identify unforeseen impacts and implementation issues, rather than to provide a veto mechanism for necessary policy. This protects officers from having to treat "volume of correspondence" as the primary metric of success.

Screen Name Redacted

12/03/2025 10:18 PM

The conventional model for public consultation in transport and traffic planning—often characterised by brief engagement windows, formal documents, and static public meetings—is increasingly viewed as counter-productive. It's hard work and generates anger and resentment. It's important to avoid The Noise vs. Data Problem: The model favours the "loudest" opposition group, often ignoring the "silent majority" who may support the changes but do not engage in adversarial public forums. Start early. Focus on the "Why." Make material easy to understand. Iterate to avoid finding desired solutions are unattainable. Support ideas with cheap pop-up examples (planters) and get feedback on a small scale at first, Actively seek feedback from underrepresented groups (e.g., low-income families, elderly residents, young people, shift workers) using targeted methods (surveys, community group visits) to ensure the feedback received is representative of the whole community, not just the organised supporters or opposition. Invest in data and trust data over opinion. Defend the data. Have data driven goals and be transparent through delivery. What do you want to change and what evidence is there for the need to change.

Screen Name Redacted

12/04/2025 07:52 PM

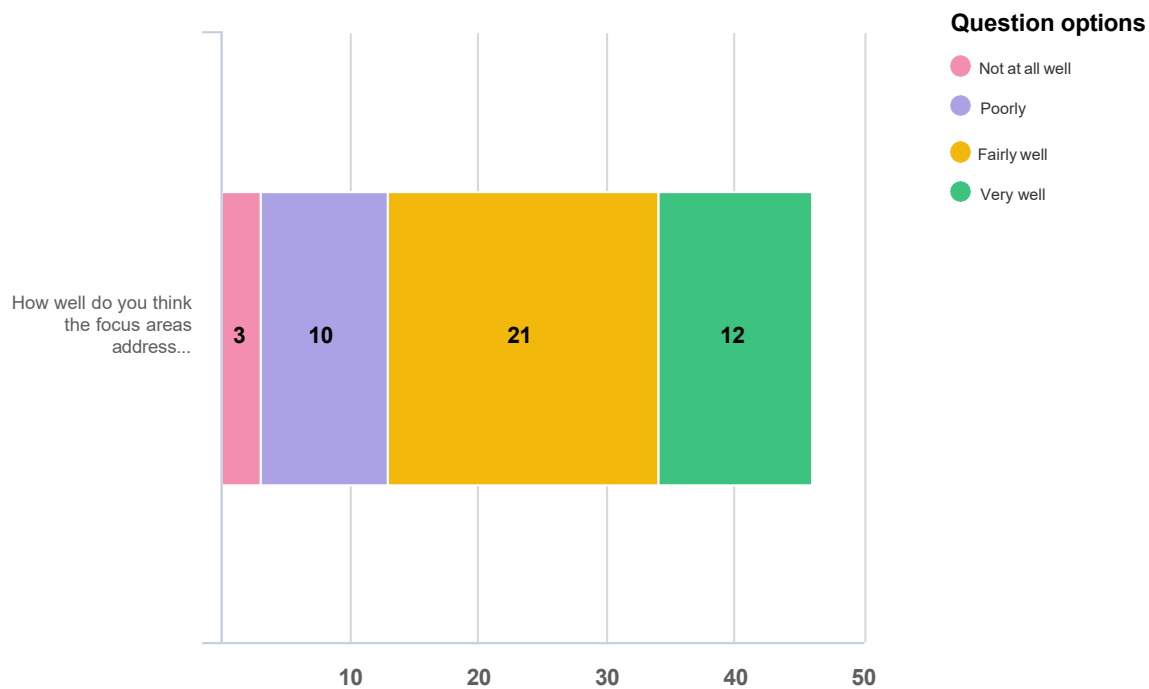
To include actual residents of Exeter, particularly those born & bred in Exeter

Screen Name Redacted

12/04/2025 09:37 PM

Follow the Official consultation principles:
https://assets.publishing.service.gov.uk/media/5ae6d71ae5274a702130dc30/Consultation_principles_.pdf

Optional question (35 response(s), 11 skipped)**Question type:** Essay Question

Q3 | Five Focus Areas

Mandatory Question (46 response(s))

Question type: Likert Question

Q3 | Five Focus Areas

How well do you think the focus areas address the needs of Consultation and Engagement for people living in Exeter?

Not at all well : 3

Poorly : 10

Fairly well : 21

Very well : 12

2 4 6 8 10 12 14 16 18 20 22 24

Q4 Are there any focus areas you feel are missing or need improvement?

Screen Name Redacted

10/23/2025 04:13 PM

Expand on who selects the topics and why? Do they just relate to current administrative obsessions.

Screen Name Redacted

10/23/2025 04:50 PM

I hope that communities covers and recognises the contribution of business to any city wide consultations.

Screen Name Redacted

10/24/2025 01:21 AM

Demographic representation

Screen Name Redacted

10/24/2025 03:21 PM

I think the strategy covers a lot of important ground, especially around being inclusive and using different ways to engage. It could go further to really meet the needs of people who are often excluded, like those facing digital exclusion, or social isolation. For example, it would help to see more emphasis on reaching people where they are, whether that's through trusted community groups, face-to-face conversations, or using formats that don't rely on digital access. Also, involving people earlier in the process would make engagement feel more genuine and empowering. It's also important that the strategy recognises that not everyone feels confident or safe speaking up, so creating spaces that feel welcoming and supportive is key. That could mean working with community leaders/champions, peer support groups, offering translation or interpretation, more visual and arts based approaches, or just being more flexible in how people can take part.

Screen Name Redacted

10/25/2025 12:37 PM

Clarity & accessibility

Screen Name Redacted

10/30/2025 01:09 PM

I'm sure that your aims are wide enough to encompass everything but that might mean your focus is drawn elsewhere.

Screen Name Redacted

10/31/2025 02:52 PM

Balancing bias and managing expectations.

Screen Name Redacted

10/31/2025 05:03 PM

These are so generic that they allow for no comment that is worthy of the name.

Screen Name Redacted

10/31/2025 09:34 PM

More accessible places, including D/deaf accessible communities and communication- not text relay

Screen Name Redacted

11/01/2025 01:01 PM

Innovative and inclusive engagement is paramount to try and build back the mis-trust the public has with the Council.

Screen Name Redacted

11/03/2025 02:26 PM

Outline the point of engagements and outcomes you're hoping for once people have engaged. It's missing the "therefore"

Screen Name Redacted

11/03/2025 02:59 PM

I would urge very careful engagement with social media as a means of seeking citizen views. Most SoMe platforms are not now places where one can seek balanced views or positive engagement. SoMe is _not_ actually where most people are. Email/on-line surveys to your citizen database is probably a more balanced way of seeking engagement. There are existing groups within the city that you could access to get a balanced and positive engagement: faith groups/churches/mosques; Civic Society, Exeter Cycling Campaign etc

Screen Name Redacted

11/04/2025 01:45 PM

Would be good to see consideration being given to how young people are consulted.

This survey, for example, has a clear document with clear objectives etc.. The same does not apply to all council consultations (for example the Grace Road disposal consultation) - There should be a real focus on ensuring that all consultations meet the high standards this consultation is providing an exemplar for

Screen Name Redacted

11/05/2025 01:34 PM

Screen Name Redacted

11/06/2025 08:02 AM

n/a

Screen Name Redacted

11/06/2025 06:05 PM

People's views seemed to ignored and overruled

Screen Name Redacted

11/07/2025 02:17 PM

No, as long as the right people are involved who are dealing with issues on the ground

Screen Name Redacted

11/07/2025 03:22 PM

Need for a bigger music venue more green, open spaces, free to be enjoyed by all

Screen Name Redacted

11/08/2025 10:43 PM

I really dont think people care about this level of detail. They just want to know that they are being listened to and consulted. I couldn't care less whether you are going to pilot and test and improve. This is very internally focused. You should be reassuring your management about these things but we as the public dont need this level of detail.

Screen Name Redacted

11/10/2025 05:40 PM

Reflection, should probably sit under number 4

Screen Name Redacted

11/21/2025 11:56 AM

I can't see how what is proposed with make for an understanding of the communities.

Screen Name Redacted

11/21/2025 08:41 PM

I feel the best way forward is for better policing, within the city centre itself, leading to a hopefully better outcome for places like Sidwell Street.

Screen Name Redacted

11/24/2025 05:48 PM

as for question 1, I am unable to understand what section of the draft engagement strategy this question refers to. When using a 'find' function, the only reference to focus areas mentioned the council's corporate plan but no other headings or information in the document as to what the 5 focus areas are.

Screen Name Redacted

12/02/2025 05:51 PM

Working with existing local communities, groups and organisations to reach people who will not engage directly with the council because of prior experiences

Screen Name Redacted

12/02/2025 11:28 PM

The overarching need across all five focus areas is for a commitment to scientific rigor in data collection and analysis. Without this, the Strategy risks being well-intentioned but fundamentally flawed due to self-selection bias. To genuinely achieve the goal of "Understanding Communities," the Council must move beyond reliance on open, self-selecting surveys, which overwhelmingly sample the angry or the time-rich. This requires embedding methodologies like representative polling and demographic weighting within the "Understanding Communities" and "Implement & Monitor" stages. Simply counting responses is not sufficient; the Strategy must ensure the data it gathers is a statistically representative sample of Exeter's diverse population, thereby making the resulting policy decisions robust, fair, and defensible.

Screen Name Redacted

12/03/2025 10:18 PM

See previous comments. Take care that in the feedback loops, you are not listening to the loudest voices. Social media does not represent a good cross section of the community. You need to ensure that processes stop groups gaming the system (response from outside the area, multiple responses from one person). See out minority groups.

Screen Name Redacted

12/04/2025 02:45 PM

Reporting - A clear roadmap of the consultation process and transparent reporting of the output and outcomes of consultation. Transparently inform participants of what was said, what that means in the context of the consultation, and the impact for residents of Exeter.

Screen Name Redacted

12/04/2025 07:52 PM

Easier ways to consult with members of the public; particularly those born in Exeter

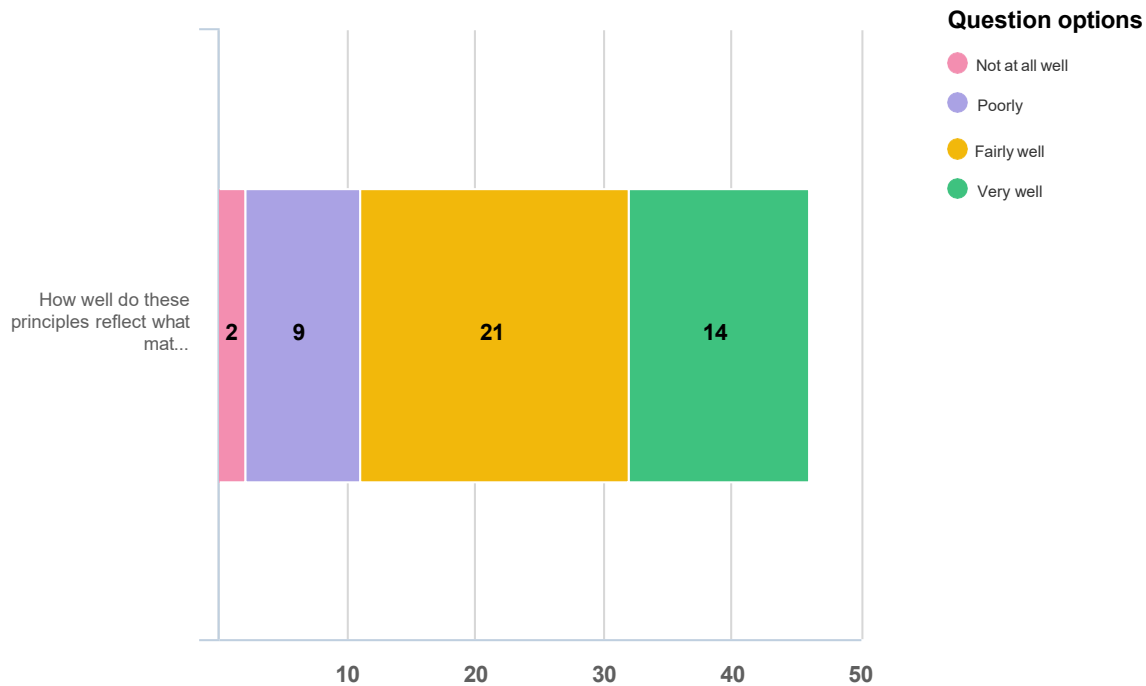
Screen Name Redacted

12/04/2025 09:37 PM

The proposed focus areas are waffly. You should follow SMART objectives https://en.wikipedia.org/wiki/SMART_criteria

Optional question (29 response(s), 17 skipped)

Question type: Essay Question

Q5 Principles guiding the strategy

Mandatory Question (46 response(s))

Question type: Likert Question

Q5 Principles guiding the strategy**How well do these principles reflect what matters to you when engaging with the Council?**

Not at all well : 2

Poorly : 9

Fairly well : 21

Very well : 14

2 4 6 8 10 12 14 16 18 20 22 24

Q6 Are there any principles you think should be added or strengthened?

Screen Name Redacted

10/23/2025 04:13 PM

The methodologies will favour squeaky wheel/loudest voice responses. How will those who are not already minded to engage be canvassed?

Screen Name Redacted

10/23/2025 04:50 PM

An essential element of the proposals.

Screen Name Redacted

10/24/2025 01:21 AM

Demographic representation

Screen Name Redacted

10/24/2025 09:31 AM

The ethos is fine, it will be about the council staff's approach and showing they are embracing the principles in thought and deed.

Screen Name Redacted

10/24/2025 03:21 PM

The principles in the strategy are all really important and align well with the kind of work we do at CoLab and with Common Ground. But I think a few could be strengthened or added to make the strategy even more meaningful for people who are often excluded. I think equity could be made more explicit. Inclusion is a great start, but equity means recognising that some people face bigger barriers and need different kinds of support to take part. It's about levelling the playing field, not just opening the door. Also, I'd suggest adding accountability as a principle. Communities need to know that their input leads to real change, and that the council will follow through on what's promised. That builds trust in a deeper way. And finally, care could be a guiding principle—especially when working with people who've experienced trauma, isolation, or exclusion. Engagement should feel safe, respectful, and genuinely supportive, not just transactional. It's that co-design stuff again..!

Screen Name Redacted

10/25/2025 12:37 PM

Honesty

Screen Name Redacted

10/30/2025 01:09 PM

No

Screen Name Redacted

10/31/2025 02:52 PM

Integrity

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10/31/2025 05:03 PM

The principal appears to be that anything that will keep the current Exeter council in power must be promised. What will be done for those area that are hoovered up into Exeter to keep the current Exeter council in power, nothing it would appear.

Screen Name Redacted

11/01/2025 01:01 PM

Integrity needs to be in there.

Screen Name Redacted

11/03/2025 02:26 PM

Efficiency, ease of access and simplicity. Simple things like having to create an account to respond to a survey can be a barrier to engagement. What questions are you asking around barriers to engagement?

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11/03/2025 02:59 PM

To your 'Principles' I would add..... * challenge and dismiss what is factually inaccurate. I've seen recent reports from Oxford City Council where the Officers' report simply dismissed some of the consultation feedback because it is factually incorrect. Recent 'consultation' exercises in Exeter (lead by DCC) would have benefitted from a similar approach. One principle therefore needs to be that Officer consideration of consultation feedback will be filtered / shaped by what is factually correct. * It is important to stress as a principle that *consultations are not referendums*. This needs underlining. * Consultations should be seeking citizen ideas to improve upon a scheme/proposals that _is going ahead_. i.e. if a council strategy says we will do something about, say, air quality in XXX road and Officers come forward with a scheme to deliver this then the consultation should be framed as "our agreed strategy commits us to improve air quality on XXX road and we are proposing to do x,y &z. Tell us how x,y & z can be improved to achieve the agreed goal" * the principles rightly stress the importance of good inclusion. Children have historically been ignored or not given a chance to input into schemes that affect them. Particular attention needs to be given to engaging with children in a way they can fully participate. I would suggest this is made explicit as a principle * Another principle that needs underlining is that all schemes need to be communicated well. Recent (again DCC!) consultations have not benefitted from well-thought-out communications which make the case for why change is needed. In addition Councillors, having voted for a scheme to be delivered and consulted upon, should be asked and expected to make the case publicly for the change that is being consulted on.

Screen Name Redacted

11/04/2025 01:45 PM

They are good. Excellent work.

Screen Name Redacted

11/05/2025 01:34 PM

There seems (from facebook comments etc., in local groups) to be a huge amount of cynicism regarding the influence of filling surveys. To increase transparency and trust, it is critical to ensure that survey participants see clear collation of views and analysis of responses, so that they can see their viewpoints being considered, and affecting policy. There is either a gap in the consideration of the views of the public, or a gap in their understand of how their views are responded to, that is creating distrust. In particular, for example, a view that seems silly, or irrelevant, to a council official does not mean that that point should not be responded to (even if it is to provide a clear, non-patronising, explanation of why it is not a viewpoint that will affect a particular policy.

Screen Name Redacted

11/06/2025 06:05 PM

Maybe if they were implemented

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11/07/2025 02:17 PM

No

Screen Name Redacted

11/20/2025 10:21 AM

I think people want to be listened to and feel they are heard. This may be included in inclusion and empathy.

Screen Name Redacted

11/21/2025 11:56 AM

This still doesn't really address that the council doesn't really listen to it's residents. Take the way that it's residents have to take part in this consultation, having to register to give their view. Is that really progress? Is that inclusive? What percentage of residents actually participate in these consultations?

Screen Name Redacted

11/21/2025 08:41 PM

Just be realistic is what you can afford to do and the outcomes you expect.

Screen Name Redacted

11/24/2025 05:48 PM

That there is top to bottom understanding across all relevant staff of the engagement strategy and the important of complying with it. Without that, it's all just words

Screen Name Redacted

12/02/2025 05:51 PM

They should all be strengthened and made commitments not aims

Screen Name Redacted

12/02/2025 11:28 PM

The current definition of Inclusion should be strengthened to explicitly address selection and participation bias. Inclusion should mean not only making the process accessible but ensuring the voices captured are representative of Exeter's demographic profile. To achieve this, the Council must commit to: Proactive Demographic Balance: Define targets for response rates across key demographics (age, tenure, location, economic status). Measuring Non-Response: For significant consultations, the Council must analyze and report on which groups are missing from the data, and how the decision-making process has accounted for this unrepresentative data skew. Targeted Outreach: The strategy must go beyond general communication and mandate targeted, funded outreach to known under-represented groups, such as younger renters, shift workers, and low-income communities. A dedicated principle focused on the quality and scientific defensibility of the data is essential. The strategy is guided by strong values, but these must be underpinned by strong methodology. The principle of Rigour would ensure: Representative Sampling: For major policy decisions, open consultation (the self-selecting group) must be supplemented or benchmarked by methods designed for statistical validity, such as random, demographically-weighted polling. Data Integrity: The Council must commit to only treating responses as data when methodology is sound. For example, explicitly stating that volume of response does not equate to representative opinion, thereby preventing the "loudest voice" from dominating the process. Implementing effective anti-gaming measures (e.g., IP tracking, Captcha, or unique sign-ups for high-impact consultations) to prevent the submission of multiple responses by the same individual or bot. As well as verifying Residence Verification for Key Consultations: For high-impact consultations (e.g., The Exeter Plan, major transport

schemes), the Council must verify respondents identity and postcode or residency status to ensure responses reflect the community and aren't skewed by external actors. Evidence-Based Decision-Making: Consultation results must be clearly segmented, analyzed, and presented as evidence to the public, along with an explanation of how any unrepresentative bias was factored out during the decision-making process.

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12/03/2025 10:18 PM

Take care that in the feedback loops, you are not listening to the loudest voices. Social media does not represent a good cross section of the community. You need to ensure that processes stop groups gaming the system (response from outside the area, multiple responses from one person). See out minority groups.

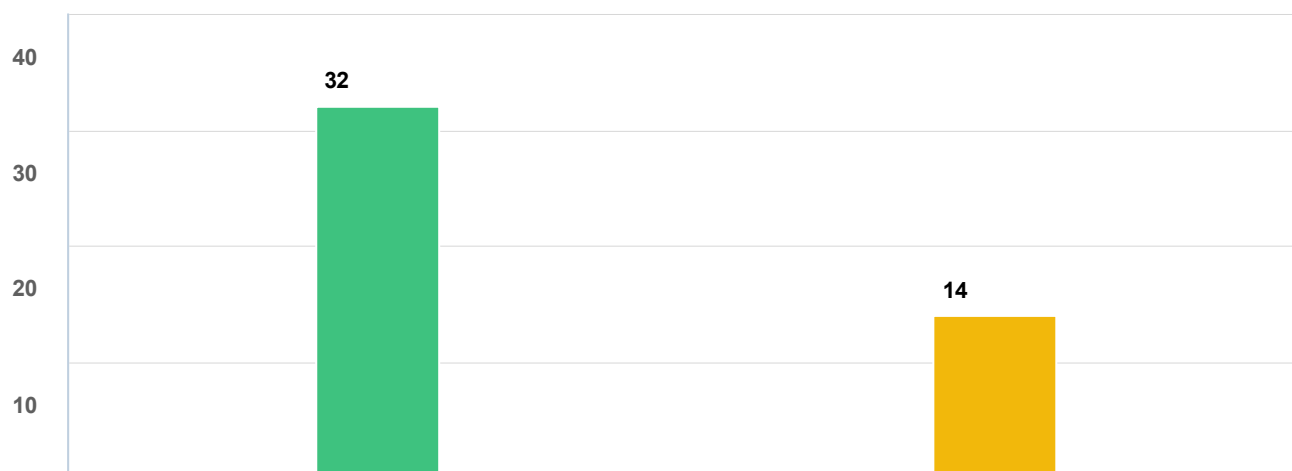
Screen Name Redacted

12/04/2025 09:37 PM

Use SMART objectives

Optional question (24 response(s), 22 skipped)

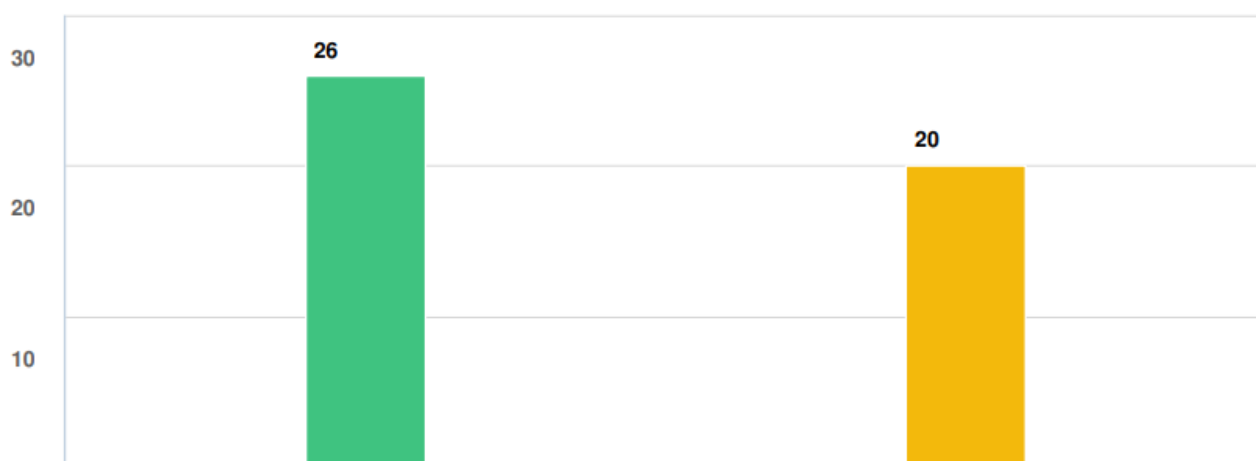
Question type: Essay Question

Q7 Will the proposed engagement methods in the strategy make it easier for you or your organisation to participate in consulta...**Question options**

☐ No ☒ Yes

Mandatory Question (46 response(s))

Question type: Checkbox Question

Q8 Are there any barriers that might prevent you or others from taking part in these activities?**Question options**

☐ No ☒ Yes

Mandatory Question (46 response(s))

Question type: Checkbox Question

Q9 | If Yes, please tell us what those barriers are

Screen Name Redacted

10/23/2025 01:11 PM

If they are ignored

Screen Name Redacted

10/23/2025 04:13 PM

4 of the 5 are group consultations which encourages 'group think' and can suppress individual expression of opinions. Also require proactive involvement, and a willingness to attending meetings and events so availability, sociability and mobility. 'If you can't be bothered to turn up we are not interested in your opinion' Social media is a notoriously flawed way to obtain opinion or 'truth'

Screen Name Redacted

10/24/2025 01:21 AM

Hard to reach groups. Young people, children. Isolated older people.

Screen Name Redacted

10/24/2025 03:21 PM

One of the biggest barriers is digital exclusion as a lot of people we work with don't have reliable internet access or feel confident using online platforms. Resources, learning and support around this would be beneficial, but to be fair, a lot of people don't want to learn and take on managing a digital life. There's also the issue of trust.. some communities feel disconnected from decision making and may not believe their input will lead to real change. Language and literacy can be a barrier too, especially for people who struggle with written materials. And also time and accessibility.. if events aren't held at convenient times or in familiar, welcoming spaces, people are less likely to take part.

Screen Name Redacted

10/25/2025 12:37 PM

Reluctance to use technology, reluctance to join groups

Screen Name Redacted

10/31/2025 02:52 PM

Accessible locations and accessible methods to participate ie scribes.

Screen Name Redacted

10/31/2025 09:34 PM

More awareness of D/deaf communication, and neuro-affirming access

Screen Name Redacted

11/01/2025 01:01 PM

Exeter's elderly community do not necessarily have access to digital platforms or if they do it is limited. Sending out paper copies with either Council Tax updates, or other Council communication may assist.

Screen Name Redacted 11/02/2025 07:46 PM	Time of meetings would be better at different times to allow different people to attend, ie parents; shift workers etc.
Screen Name Redacted 11/03/2025 02:59 PM	Reconcile yourself to always being criticised for not consulting fully. There was never a change management process where all affected people say "I was consulted fully" ! Depressing perhaps, but true.
Screen Name Redacted 11/04/2025 01:45 PM	The strategy is quite high level, so without seeing more specific details (e.g. the type of technology solutions you are planning to use) it's difficult to say whether the strategy will make it easier or what the barriers are.
Screen Name Redacted 11/04/2025 07:45 PM	Lack of IT access
Screen Name Redacted 11/05/2025 01:34 PM	Anyone who does not have the digital connectivity to reach all the survey documentaiton, or use the digital platform
Screen Name Redacted 11/07/2025 03:22 PM	lack of trust, lack of transparency, poor communication amongst arts and community organisations, poor transport links especially in the evening, for people who live outside Exeter and wish to attend live music events.
Screen Name Redacted 11/08/2025 10:43 PM	Time
Screen Name Redacted 11/10/2025 05:40 PM	The people conducting those activities and their understanding about how to do it. For example - the 'roadshow' display that was used for the City Plan was put up in different parts of the city. At two which I attended there were no seats provided, yet it was expected for us to read materials that took about an hour. It's all very well having the correct buzzwords, it's the training and understanding of your team that matters on the ground.
Screen Name Redacted 11/20/2025 09:12 AM	The language used, needing to create accounts to participate and 95% of the community will be unaware that they are able to view and be involved in this.
Screen Name Redacted 11/20/2025 10:21 AM	Older people tell us time and time again that they struggle with digitalisation. Meeting groups where they are at or going out to assisted living complexes or GP surgeries will be key

Screen Name Redacted

11/21/2025 11:52 AM

lack of information in the first instance. I joined this platform but am aware that many thousands more will have no knowledge of its existence.

Screen Name Redacted

11/21/2025 11:56 AM

Digital platforms are not an easy access. And as any face to face activities are held in places and times suitable to the council rather than the working population it's seems like it's going to be 'lip service ' and a 'tick box exercise '.

Screen Name Redacted

11/24/2025 05:48 PM

knowing that engagement activities are on offer / live. Not having enough trust in the results being taken seriously to invest effort in engagement

Screen Name Redacted

12/02/2025 05:51 PM

Prior experiences of consultations in name only from local authorities

Screen Name Redacted

12/02/2025 11:28 PM

Time.

Screen Name Redacted

12/04/2025 02:45 PM

Digital exclusion may create barriers for people with sight loss and those not well versed in technology. People with sight loss are twice as likely to be digitally excluded when compared to the general population. This is strongly linked to age. The numbers of people aged 18-49 who don't use the internet are extremely small, and people with sight loss in this age group appear to be just as likely to use the internet as people in the general population. Older people are much more likely to not use the internet, with 63 per cent of people with sight loss aged 75 plus not using or having access to the internet (compared to a UK average of 52 per cent for the same age group) . With this in mind, any aspiration to implement digital methodology must not be at the expense of those who are already digitally excluded

Screen Name Redacted

12/04/2025 07:52 PM

Not being aware of any public consultations as not advised how to attend. Some people of my age do not have access to the internet

Optional question (25 response(s), 21 skipped)

Question type: Essay Question

Q10 What engagement methods could be added or strengthened to make it easier for you to engage with the Council?

Screen Name Redacted

10/23/2025 04:13 PM

I am not the one you should be worried about, after all by doing this survey I am already engaged and therein lies the problem. How to seek input from those who are not already engaged. How to find out why not, what mechanisms can be used to canvas the sceptics, the disillusioned, the apathetic.

Screen Name Redacted

10/23/2025 04:50 PM

Direct access to senior officers by business groups has in the past been vital to the creation of genuine worthwhile and effective partnership in the past and I would hope this could continue to influence policy offered for public review.

Screen Name Redacted

10/24/2025 01:21 AM

Telephone contact, involvement via schools

Screen Name Redacted

10/24/2025 03:21 PM

To make engagement more inclusive, it would help to build on relationships with trusted community organisations who already have strong relationships with people who are often excluded. Offering one-to-one conversations or informal drop-ins, which can feel more approachable than formal workshops. Use creative methods like visual storytelling, participatory art, or walk-and-talk sessions to make engagement more engaging and less intimidating. Developing positive relationships further by following up with communities to show how their input has been listened to and made a difference. This builds trust and could encourage future involvement and co-design.

Screen Name Redacted

10/25/2025 12:37 PM

Accessible 'drop in points', postal contact

Screen Name Redacted

10/30/2025 01:09 PM

None

Screen Name Redacted

10/31/2025 02:52 PM

Phone interviews.

Screen Name Redacted

10/31/2025 05:03 PM

I have no level of trust in the people making these proposals, the proposals are both vague and self serving.

Screen Name Redacted 11/01/2025 01:01 PM	Maybe the Council Offices could have an open day, I only found out recently, your office front was changed 20 years ago. Its not a place I visit, I'm not sure this is a challenge for you to reach all aspects of our community.
Screen Name Redacted 11/03/2025 11:37 AM	I know it is a high cost method but leafleting certain areas could be a good method. I only see these consultations as I work in local government, I'm not sure that my friends would see any consultations or engagements in their day-to-day life.
Screen Name Redacted 11/03/2025 02:26 PM	Online MS form which doesn't require accounts
Screen Name Redacted 11/03/2025 02:59 PM	I like the proposal to "Recruit and maintain groups of 'community researchers/ volunteers/ panels to support early-stage engagement on issues, to support us in gaining diverse community voices" You may not need to *recruit* to make this happen. There are already community groups (faith groups, self-help groups, local area groups, Civic Society, Cycling Campaign etc) which already exist and could be used as a means for reaching much of the community.
Screen Name Redacted 11/04/2025 01:45 PM	The strategy is quite high level, so without seeing more specific details (e.g. the type of technology solutions you are planning to use) it's difficult to say whether the strategy will make it easier or what the barriers are.
Screen Name Redacted 11/04/2025 07:45 PM	Local social groups eg church groups
Screen Name Redacted 11/05/2025 01:34 PM	The council could hold 'pop-up' sessions in communities, for example at local markets or fetes, where they provide a couple of laptops and an advisor who could encourage people passing to engage with the current consultations.
Screen Name Redacted 11/06/2025 06:05 PM	Public being listened to and not completivnored!!
Screen Name Redacted 11/07/2025 02:17 PM	To continue to have links with key stakeholders
Screen Name Redacted 11/07/2025 03:22 PM	inclusivity regardless of size of organisation, focus on individual projects and initiatives led by arts organisations, community interest companies, not for profit orgs and social enterprises and being listened too. we find a lack of awareness in terms of what is going on in the city in the evenings, the quay could be more vibrant if the majority of cafes, shops etc didn't close at 5pm.

Screen Name Redacted

11/10/2025 05:40 PM

Training for your teams in this sort of activity - from people in other sectors and community groups, maybe?

Screen Name Redacted

11/20/2025 09:12 AM

Face to face meetings, monthly meetings, invitations to meetings. A place in town the community can go to to discuss issues.

Screen Name Redacted

11/20/2025 10:21 AM

Removing as many barriers as possible for older people. Often mobility, digital, transport, health can be barriers. Collaborative working to access existing groups would be helpful and also working flexibly to meet people's needs.

Screen Name Redacted

11/21/2025 11:56 AM

Door to door, short methods. Use of supermarkets to reach out to people. Stopping this culture of having to register and do everything online.

Screen Name Redacted

11/21/2025 08:41 PM

Find out what the people of the area really want, not just what the Council want.

Screen Name Redacted

12/02/2025 05:51 PM

Remote focus groups and interviews

Screen Name Redacted

12/02/2025 05:57 PM

I think it is very important that the digital platforms are easy to use and well designed so the questions, sequencing and lay-out prompts people to think about the subject of the survey and provide good feedback in a form that can be readily used to inform plans and proposals. It is also important to have a consistent platform for most or all surveys, with a consistent look and feel. That will make the experience of completing surveys easier and encourage more people to respond.

Screen Name Redacted

12/02/2025 11:28 PM

The council should consider including Representative polling / surveys Citizens juries / panels Targeted physical pop ups to reach under represented groups Stakeholder workshops Utilisation of existing community groups

Screen Name Redacted

12/03/2025 10:18 PM

The problem is mostly the other way round. How do you get views from the silent majority who don't necessarily seek to engage. How do you avoid engagement from people outside the area.

Screen Name Redacted

12/04/2025 07:52 PM

Consultation papers to be posted to everyone; particularly those in retirement living housing

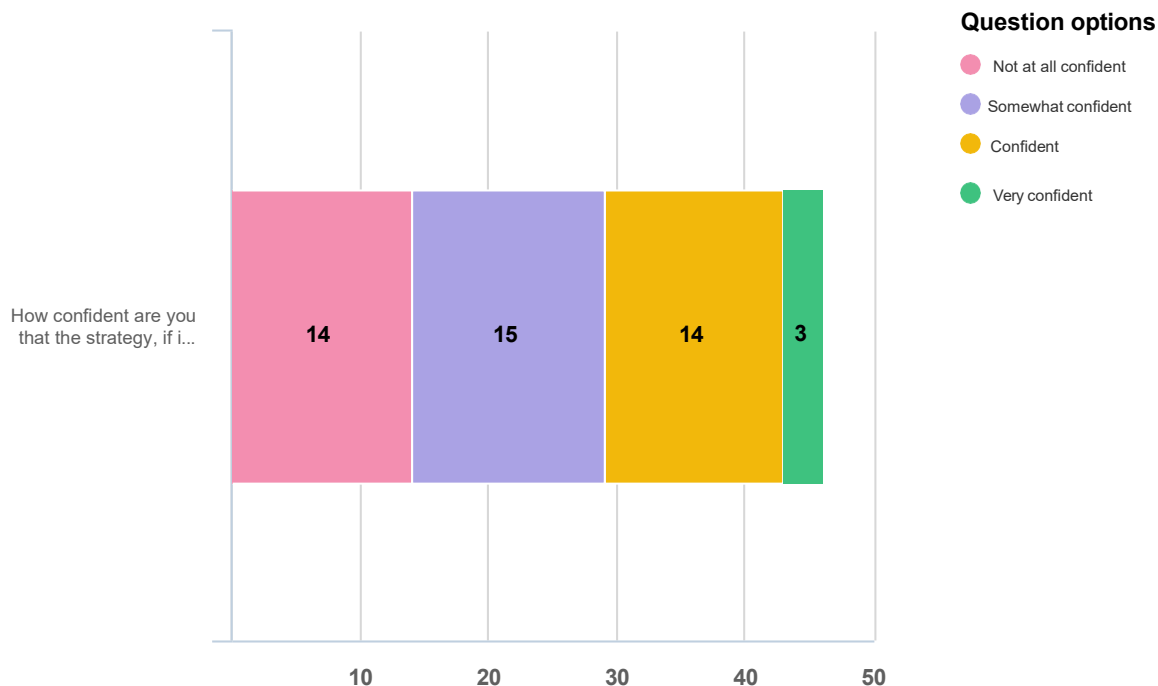
Screen Name Redacted

12/04/2025 09:37 PM

Avoid methods that provide obstacles to people with limited IT skills.

Optional question (29 response(s), 17 skipped)

Question type: Essay Question

Q11 | Implementation

Mandatory Question (46 response(s))

Question type: Likert Question

Q11 | Implementation**How confident are you that the strategy, if implemented, will improve consultation and engagement in Exeter?**

Not at all confident : 14

Somewhat confident : 15

Confident : 14

Very confident : 3

2 4 6 8 10 12 14 16

Q12 What would help ensure the strategy is successfully implemented and monitored?

Screen Name Redacted

10/23/2025 04:13 PM

How to assess the relevance of the subject to the communities priorities? How to ensure and measure that a realistic cross section of the community has responded? How to avoid question and poling scope bias in surveys. Should there be a third party assessor to ensure true inclusivity and relevance?

Screen Name Redacted

10/23/2025 04:50 PM

Demonstration off the impacts that the engagement has genuinely had on the policies and outcomes following consultation.

Screen Name Redacted

10/24/2025 01:21 AM

Regular progress updates posted via usual ECC comms channels

Screen Name Redacted

10/24/2025 09:31 AM

Getting to the widest amount of people, especially those whose voices are not heard.

Screen Name Redacted

10/24/2025 03:21 PM

To make sure the strategy is successfully implemented and monitored, I think a few things would really help: Clear accountability/visibility so that it's obvious who's responsible for delivering each part of the strategy, and regular updates so people know what's happening. Ongoing community involvement—not just during the consultation phase, but throughout the implementation. That way, communities can help shape how things are rolled out and keep the council grounded in real experiences. Feedback that forms part of an ongoing relationship. It's important that people see how their input has influenced and helped shape decisions. Flexibility is important so that the strategy can adapt based on what's working and what's not, especially as community needs change. This is a big ask, I know!

Screen Name Redacted

10/25/2025 12:37 PM

Openness & truthfulness. Previous consultations have been flawed & untrue

Screen Name Redacted

10/30/2025 01:09 PM

Enough resources

Screen Name Redacted

10/31/2025 02:52 PM

Testing the process before implementation.

Screen Name Redacted

10/31/2025 05:03 PM

Having someone who does not have a record of failure and debt creation in charge, i.e. not the current Exeter Council.

Screen Name Redacted

11/01/2025 01:01 PM

More communication that is not only digital. Promo's, maybe during the run-up to Christmas, have a stall somewhere, explaining about Exeter City Council, what the strategy is and how you are here to support us, as well as represent us.

Screen Name Redacted

11/03/2025 02:26 PM

Have some residents on the board or as volunteer trustees to oversee and hold the council to account to responding to engagement and following the steps set out in the strategy

Screen Name Redacted

11/03/2025 02:59 PM

Councillors to encourage Officers to come forward with bold plans and then support them in publicly speaking in favour of the changes they have voted to deliver.

Screen Name Redacted

11/04/2025 01:45 PM

Consultations are not referendums, they are an opportunity to question proposals and to gather evidence. If hundreds of people respond to a consultation arguing that the colour black is the colour white, their feedback should be rejected. This principle must be made clear to respondents throughout any consultation or engagement process. "If your feedback is proven to be materially incorrect by evidence gathered by this consultation, then it will be discounted by the decision makers. This will be accounted for in the report." I would urge Exeter City Council to make the importance of facts clear as part of their consultation and engagement strategy. It's staggering that this needs to be said, but it's the reality of the world we are now living in.

Screen Name Redacted

11/04/2025 07:45 PM

Ensure local councillors properly engage with all local people not just those that belong to their political party.

Screen Name Redacted

11/05/2025 01:34 PM

The 'Consultation Charter' has been in place for several years, and many consultation do not confirm to it. This strategy will only improve consultations if those who engage with surveys and consultations get active feedback to show they are being heard. Word of mouth will then increase participation rapidly. For example, completing a survey should provide an automatic feedback loop so that the participant receives the survey results and possibly even a response to the points they raise by email.

Screen Name Redacted

11/06/2025 06:05 PM

Input of local residents

Screen Name Redacted

11/07/2025 02:17 PM

Good communication. Lots of transparency. Anonymised illustrative examples of good practice

Screen Name Redacted

11/08/2025 10:43 PM

It not being a tick box exercise. People actually publishing what has changed as a result of a consultation.

Screen Name Redacted

11/10/2025 05:40 PM

Someone who isn't a part of ECC having oversight

Screen Name Redacted

11/20/2025 09:12 AM

There is no trust in the council and the way it spends money. So even with our involvement I would assume this is just a tick box to make it look like your involving the community, but actually what ever feedback you get, the council will just do what it wants.

Screen Name Redacted

11/20/2025 10:21 AM

Embedding it at every level of proceedings. Talking about engagement and having buy in from councillors as well as those working with people on the ground. Our clients have also articulated that they tire of engagement when they don't feel heard or feel that things change. Could their be an older person's representative on the Council to ensure consultation and learning is fed back?

Screen Name Redacted

11/21/2025 11:52 AM

Though it may be somewhat improved, the failure comes when, in spite of this communication, people still see their council taxes rise, with less tangible improvements in the community around them. This problem is endemic in any organisation, and communication is not always the answer to better funding, caring or thinking.

Screen Name Redacted

11/21/2025 11:56 AM

Stop being pompous and actually go and meet the people face to face.

Screen Name Redacted

11/21/2025 08:41 PM

Encourage the constituents to participate.

Screen Name Redacted

11/24/2025 05:48 PM

all senior management and political leaders taking it seriously.
Monitoring of senior staff engagment is essential

Screen Name Redacted

12/02/2025 05:51 PM

Seeing it actually implemented rather than a paper tick box exercise

Screen Name Redacted¹

2/02/2025 11:28 PM

The strategy needs specific, quantitative metrics to judge its success, for example: KPIs for Representation: Define measurable targets for addressing bias. For example: Demographic Alignment Score: Target a maximum variance of 10% between consultation respondents' age/tenure distribution and the latest Census data for every Strategic consultation. Targeted Outreach Success Rate: Track the percentage increase in responses from identified under-represented groups (e.g., U30s, Private Renters) year-on-year. The strategy must codify who is responsible for its success and its failure. Designated Strategy Lead: Nominate a Senior Responsible Officer (SRO) at a Director level who is ultimately accountable for the Strategy's overall performance, reporting directly to the executive. Mandatory Training and Standards: Require mandatory, ongoing training for all relevant officers (not just the engagement team) on the new principles, especially regarding bias mitigation and data validation. This ensures the principles are embedded across all departments. Independent Review: Commit to a formal, independent audit of the Strategy's performance every three years to assess its effectiveness in addressing bias and achieving inclusion targets. Ensure adequate funding Dedicated Budget for Rigour: Allocate ring-fenced funding specifically for the new, rigorous methods for consultation such as: Commissioning Representative Polling (essential for combating self-selection). Funding small-scale Citizens' Juries/Panels. Anti-Gaming Technology and data integrity checks. Resource Allocation for Non-Digital: Explicitly allocate funds and staff time for the logistics of non-digital outreach (e.g., printing, postage, staffing pop-up sessions)

Screen Name Redacted

12/02/2025 05:57 PM

Be rigorous about measuring success, (as in the final slide - 'Measuring Success Annually'), AND carry out continual improvement based on the results

Screen Name Redacted

12/03/2025 10:18 PM

See initial comments. Many changes need to be data driven and it's about explaining that more than collecting opinions. More effort required to ensure opinions are representative of the whole community and include minorities. Also, a more robust approach to ensuring data gets more weight than opinions that aren't supported by data.

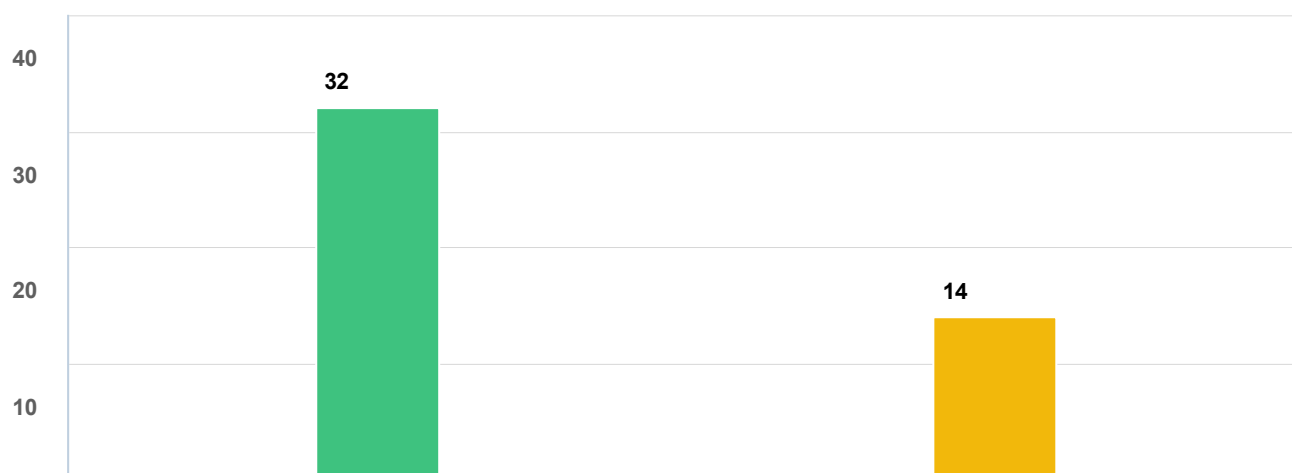
Screen Name Redacted

12/04/2025 07:52 PM

The Council need to listen

Optional question (30 response(s), 16 skipped)

Question type: Essay Question

Q13 Do the proposed measures of success reflect what you think is important for understanding the impact of consultation and en...**Question options**

☐ No ☒ Yes

Mandatory Question (46 response(s))

Question type: Checkbox Question

Q14 What measures could be added or strengthened

Screen Name Redacted

10/23/2025 04:13 PM

Who has oversight of this process, it's relevance, fairness and inclusivity? Are there any independent monitors to ensure impartiality and trust building? Are anonymous council officers going to mark their own score cards? Every one has an agenda and so transparency is the only way to ensure trust how is transparency realistically being delivered?

Screen Name Redacted

10/23/2025 04:50 PM

Important that the process is seen to be the consequence of well considered engagement by the lasting and hopefully increasing metrics used to measure success.

Screen Name Redacted

10/24/2025 01:21 AM

Participation demography reflects city's demography

Screen Name Redacted

10/24/2025 09:31 AM

Whether the community feels it has Equity in this and feels they have the power to influence the process.

Screen Name Redacted

10/24/2025 03:21 PM

The proposed measures such as increased participation, diversity, and trust are a good start. I think they could be strengthened by looking more closely at who is participating, not just how many. For example, are we hearing from people who are usually excluded like those facing homelessness or mental health challenges? Working with groups who can help with that would give a clearer picture of whether engagement is truly inclusive. Also, it would help to measure how people feel about the process, not just the outcomes. Do they feel respected, listened to, and safe? That kind of feedback is harder to quantify but really important for building trust.

Screen Name Redacted

10/31/2025 05:03 PM

It's all about Exeter city, not about the community as a whole.

Screen Name Redacted

11/01/2025 01:01 PM

Not sure any further measures would make a significant difference.

Screen Name Redacted

11/03/2025 02:26 PM

"You said we did" type publications via letter which show the value of engagement

Screen Name Redacted

11/03/2025 02:59 PM

It's a difficult thing to measure the efficacy of consultations. I wish you well with this!

Screen Name Redacted

11/04/2025 01:45 PM

It's great to see the measures of the success of this strategy so clearly articulated. One comment I would make is that attendance isn't always a measure of success. Whilst it can be a positive for training or networking events, high attendance can sometimes show that something has gone wrong. If people aren't turning up to an event they are aware of, that can mean that things are okay. It would be good for there to be a measure around partnership working. For example, the number of partnership projects that are set up as a result of engagement activity. It would also be good to see all of these measures being linked back to the ECC corporate plan, so the various strategies are clearly talking to each other.

Screen Name Redacted

11/05/2025 01:34 PM

In "Annual Survey", as well as a survey (which will only be accessed by those already using the processes), the council could create, for example, ECC accounts that join local social media groups, and interact with those people that will engage with those groups, but not the official survey. This would provide a better overview of how people feel disconnected, and publicise the consultation processes.

Screen Name Redacted 11/06/2025 06:05 PM	Let's just say you can propose as many measures as you like but few will be implemented. This council is very good at backtracking
Screen Name Redacted 11/07/2025 02:17 PM	Measurable outcomes, in terms of change in people's life outcomes - e.g. moving from unemployment to employment, moving from isolation to being in community.
Screen Name Redacted 11/08/2025 10:43 PM	I dont think increasing the number of consultations should be a measure. People will get consultation fatigue
Screen Name Redacted 11/10/2025 05:40 PM	Absolutely open listening - such as public fora for people to propose developments and changes in the city.
Screen Name Redacted 11/20/2025 10:21 AM	Would be good to have good data on who is engaging, not just numbers.
Screen Name Redacted 11/21/2025 11:52 AM	see "Boaty McBoatface" for the reasons that asking every individual for input, is not always optimal progress.
Screen Name Redacted 11/21/2025 08:41 PM	Robust policing in the area. Being more aware of antisocial behaviour and dealing with it forcefully.
Screen Name Redacted 12/02/2025 05:51 PM	Having SMART objectives and KPIs for them.
Screen Name Redacted 12/02/2025 11:28 PM	Strengthen diversity: Added Measure: Demographic Alignment Score (DAS): Success should be measured by how closely the demographics of the consultation respondents align with the overall Exeter population (based on the Census or ONS data). A target should be set for a maximum variance (e.g., 10%) between the respondent profile and the city profile. This is the true measure of representative inclusion. Added Measure: Representative Sampling Requirement: Success should be defined by the Council's successful commissioning and utilization of representative polling for a minimum number of consultations per year, ensuring the "silent majority" is heard. Trust: Add a Policy Adoption Ratio: For qualitative insight, measure the number of new, non-obvious issues or solutions identified by the public that were subsequently adopted or directly addressed in the final policy, demonstrating that the consultation was not a foregone conclusion. Participation: Simply counting responses is a poor metric if those responses are duplicated or submitted by non-residents Add a Data Validity Score: Track the percentage of total responses that were identified, filtered, and removed due to anti-gaming checks (e.g., clear duplication, non-residency, or automated responses). A lower score indicates better data security and integrity. External/Internal Ratio: Track the percentage of valid responses that came from verified Exeter residents and local stakeholders versus those from external sources, ensuring local decisions are driven by the local community.

Screen Name Redacted

12/03/2025 10:18 PM

I would question the drive for more consultations. Fewer, but better consultations on the topics where public trust is most important is going to be more effective. Increasing numbers of people who respond is also not the best measure. The responses need to be more representative to avoid the loudest-voices problem. .

Screen Name Redacted

12/04/2025 02:45 PM

Consultation is a two way process . Clear and transparent processes to report to participants and residents of Exeter on the outputs, outcomes and impact of consultation should be included as part of Section 6.

Screen Name Redacted

12/04/2025 07:52 PM

To state things in plain English making it easier to understand questions you are asking

Optional question (23 response(s), 23 skipped)**Question type:** Essay Question**Q15** | **Final Comments: is there anything else you would like to say about the draft strategy?**

Screen Name Redacted

10/23/2025 04:13 PM

This is a good start but does not go anything like far enough. Surveys are only actionable if they can be shown to be truly representative of the effected communities opinions. Too often surveys are disregarded as only reflecting the views of the 'same old vocal few' and not the 'silent majority'. The only way to avoid that is to ensure 'the silent majority' is canvased in a scientific way. There is plenty of expertise in this this field but it does not seem to be fully reflected in the draft strategy.

Screen Name Redacted

10/23/2025 04:50 PM

A step in the right direction.

Screen Name Redacted

10/24/2025 01:21 AM

It looks well thought through!
Overall, the strategy feels thoughtful and very human, and it's great to see a focus on empathy, inclusion and innovation. It would be great to see it go beyond consultation and move towards community-led decision-making. That means building long-term relationships, sharing power, and making sure the most excluded voices are not just heard but actively shaping the future of the city.

Screen Name Redacted

10/24/2025 03:21 PM

Work with the community to get the engagement process at all the local groups.

Screen Name Redacted

10/31/2025 02:52 PM

Screen Name Redacted

10/31/2025 05:03 PM

One of the worst strategy documents I have ever read. It is so vague in what it says and is full of mealy mouthed platitudes that, I assume, are meant to sound good but just give the impression of blandness and incompetence.

Screen Name Redacted

11/01/2025 01:01 PM

The strategy should also focus on listening, and ensure those in Focus Groups are representative of their communities but also are communicating this. I appreciate this is a 'hard sell' for the Council, and thank you for the work you have put in to date.

Screen Name Redacted

11/02/2025 07:46 PM

Keep at it!

Screen Name Redacted

11/03/2025 11:37 AM

I like the document itself, it is mostly clear and well laid out. It would be good to see a report after the engagement has been completed to understand the feedback and the steps you've taken to address any feedback.

Screen Name Redacted

11/03/2025 02:59 PM

Allow me a few repeats of previous points: * consultation is not a referendum, and this needs to be repeatedly stressed * consultation should be about making a proposal better and usually not about "shall we make this change or not" * find ways of engaging the children better * use _existing_ community groups, faith groups, local area groups, charities etc to access people across the city * don't use consultations to ask "should we deliver on are already agreed strategy or not?" Thank you

Screen Name Redacted

11/04/2025 01:45 PM

I've lived in Wonford in Exeter for nearly 20 years, close to Burnthouse Lane. We love living here, but the area ranks highly on deprivation indices. This stretches right back to our origins in the old west quarter in the 19th and early 20th century. Subsequently a lot of organisations can access funding to work here, and carry out consultations to inform their plans. As a result, we can feel like we're being consulted constantly, whilst the result of previous consultations remain undelivered. We're currently waiting on football pitches, changing rooms and a wellbeing hub from previous consultations in Wonford. The NHS are considering a consultation on health inequalities on the estate. To address this Exeter City Council should look to establish a repository for all consultations that are carried out in Exeter, not just the ones they deliver. This will require careful wording of a GDPR data sharing clause and strong engagement with partners. Thanks for your hard work on this, you've done a really good job summarising a complex topic and pulling together a concise strategy.

Screen Name Redacted

11/06/2025 06:05 PM

Yes. I believe the council have a good of what they will be doing and no amount of feedback or interactions from the public will change their minds.

Screen Name Redacted

11/07/2025 02:17 PM

It looks good on paper, but there needs to be good life examples to celebrate to ensure that it means anything

Screen Name Redacted

11/08/2025 10:43 PM

I think you need to ask real questions that enable meaningful change as a result. The consultation around the council corporate plan was abysmal. It did not allow us to make comments on the plan, just say whether we thought th priorities would improve our lives. It is the worst survey I have ever completed.

Screen Name Redacted

11/10/2025 05:40 PM

It's all very good, however, historically ECC have been a car crash when it comes to consultation. Please use other people (Red Quadrant were good when you cut the arts funding) such as organisations in the creative industries to train your teams and help you to shape your consultations.

Screen Name Redacted

11/20/2025 10:21 AM

Thank you.

Screen Name Redacted

11/21/2025 08:41 PM

I think you need to make all constituents aware of this survey, until you do they will be an un-tapped source of what the locals really want.

Screen Name Redacted

11/24/2025 05:48 PM

it has too much jargon, and is not at all easy to follow.

Screen Name Redacted

12/02/2025 11:28 PM

The current Draft Strategy, while strong on aspiration, needs structural amendments to address the fundamental risk of wasted public funds and eroded trust. A strategy that prioritizes volume of response over scientific rigour (as detailed in previous sections) will inevitably lead to policies based on unrepresentative, self-selected data. This creates a cycle where: Resources are misspent managing and analyzing large volumes of skewed responses. Policies are delayed or diluted by the "loudest voice," failing to serve the silent majority of Exeter residents. Public trust collapses when residents feel the Council is either unable or unwilling to differentiate between genuine community opinion and organized opposition. The Council should adopt the principle of Representative Inclusion by mandating statistically valid methods (like polling and Citizens' Juries) and Data Integrity checks for all strategic consultations. The ultimate measure of success for this Strategy must be auditable evidence that all decisions are based on data that accurately reflects the full demographic and geographic spread of the city.

Screen Name Redacted

12/03/2025 10:18 PM

See comments under 1.

Screen Name Redacted

12/04/2025 02:45 PM

Guide Dogs welcomes Exeter City Councils commitment to strengthening engagement with people and communities in Exeter and the inclusion of a commitment to the Gunning Principles. Guide Dogs would highlight that The Equality Act 2010 sets out several key equality duties for public bodies in relation to consultation and engagement. In addition to the general duties and prohibitions on discrimination, public bodies are also subject to the Public Sector Equality Duty (PSED). The duty is anticipatory: authorities must proactively assess whether disabled groups are likely to experience substantial disadvantage and take reasonable steps to prevent or remove it. Responses to public consultations from disabled people require particular attention and even where consultation feedback is limited, existing research that shows significant adverse impacts on disabled groups triggers the duty.

I would like a full consultation to be sent to everyone asking for views on a decent sized theatre/arena venue in the City Centre. This would also help with night time economy of the city; in turn making it feel safer for women

Screen Name Redacted

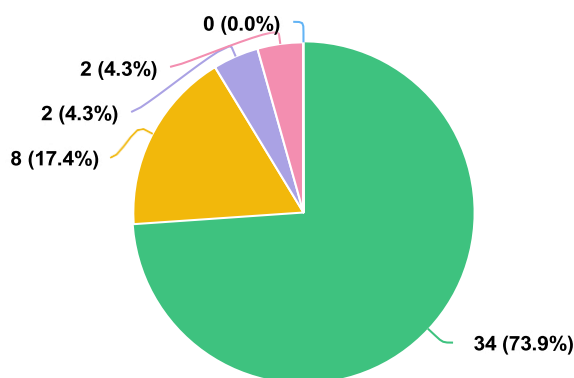
12/04/2025 07:52 PM

Screen Name Redacted

12/04/2025 09:37 PM

Have a rethink.

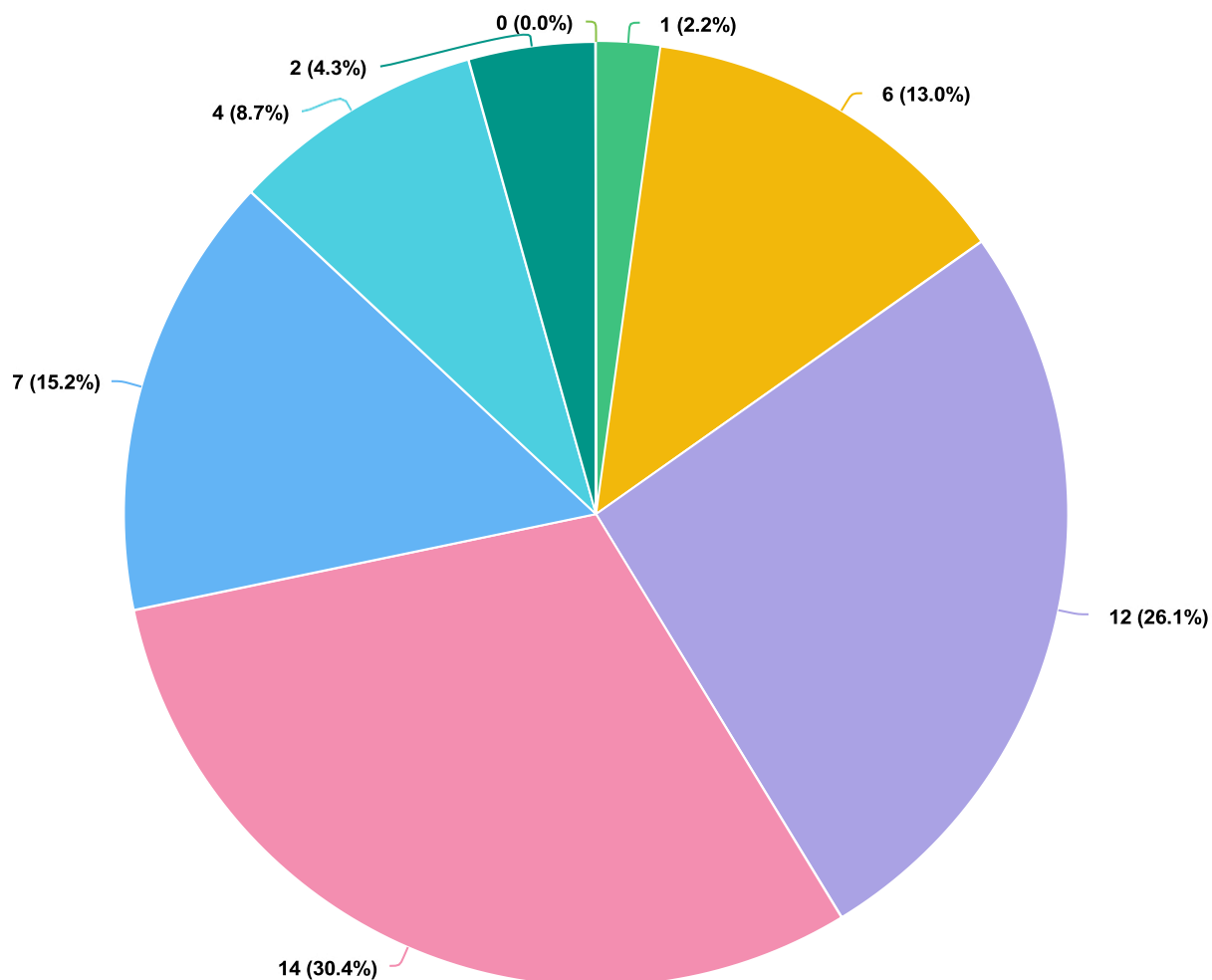
Optional question (24 response(s), 22 skipped)**Question type:** Essay Question

Q16 In what capacity are you answering?**Question options**

- ☐ (If you're answering on behalf of an organisation/ community group - please let us know which) ☐ I prefer not to say
- ☐ As a council member ☐ On behalf of an organisation/ community group ☐ As an individual

Mandatory Question (46 response(s))

Question type: Dropdown Question

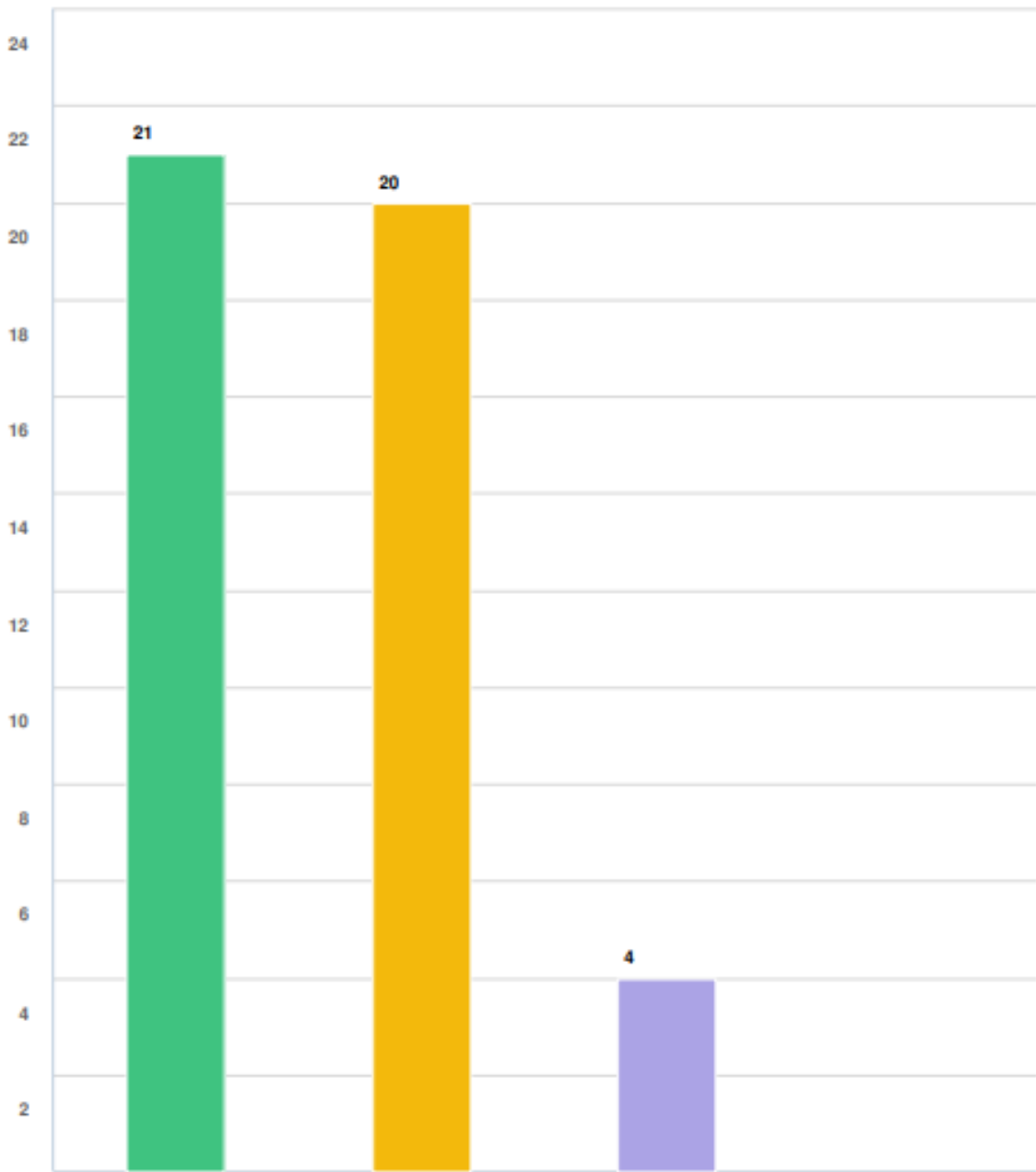
Q17 Which of the following age bands you fall into**Question options**

16 to 24 Prefer not to say 75+ 65 to 74 55 to 64 45 to 54 35 to 44 25 to 34

Optional question (46 response(s), 0 skipped)

Question type: Dropdown Question

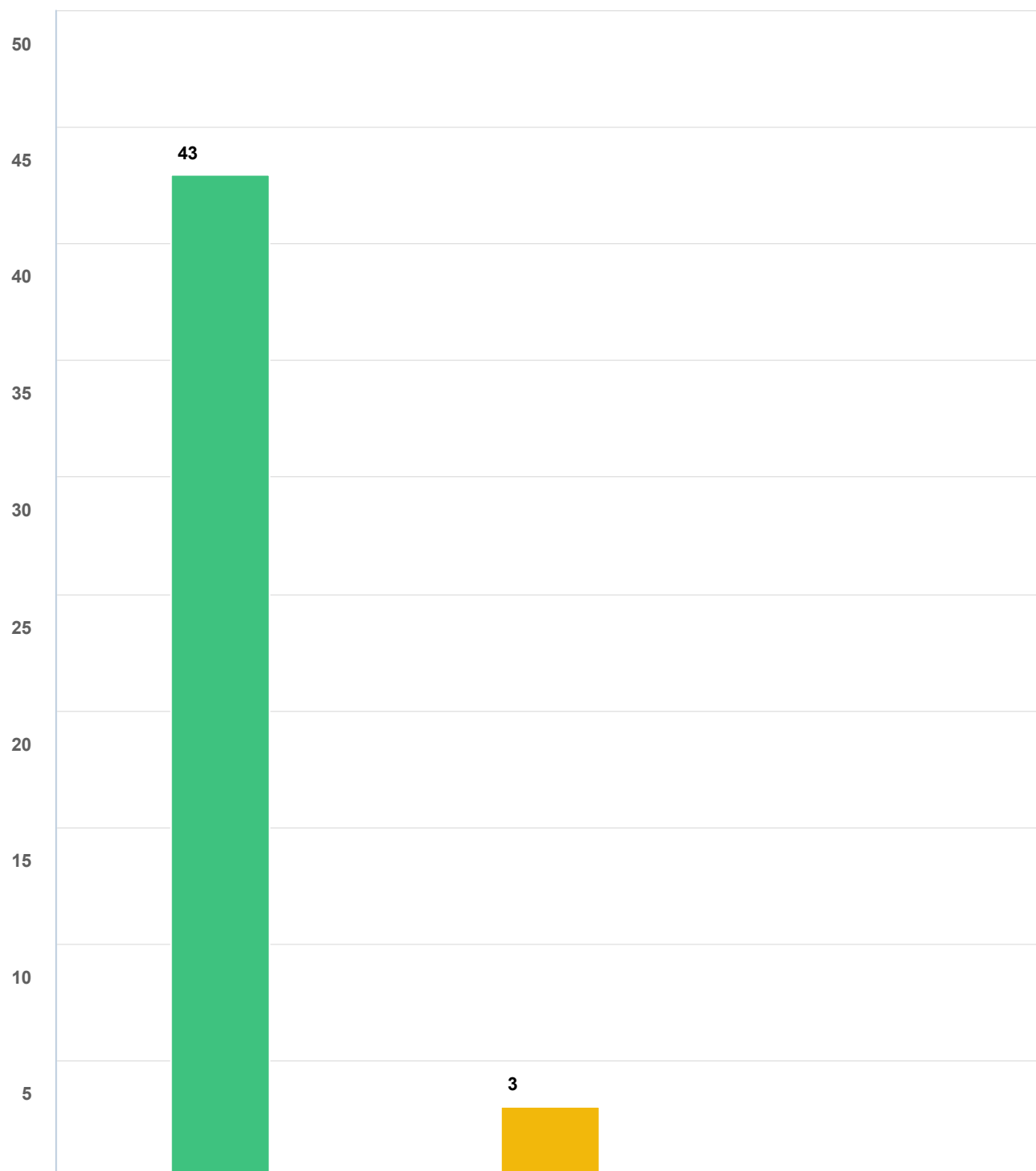
Q18 How do you describe your sex?



Question options

☐ If you describe your sex in another way, please let us know ☐ Prefer not to say ☐ Male ☒ Female

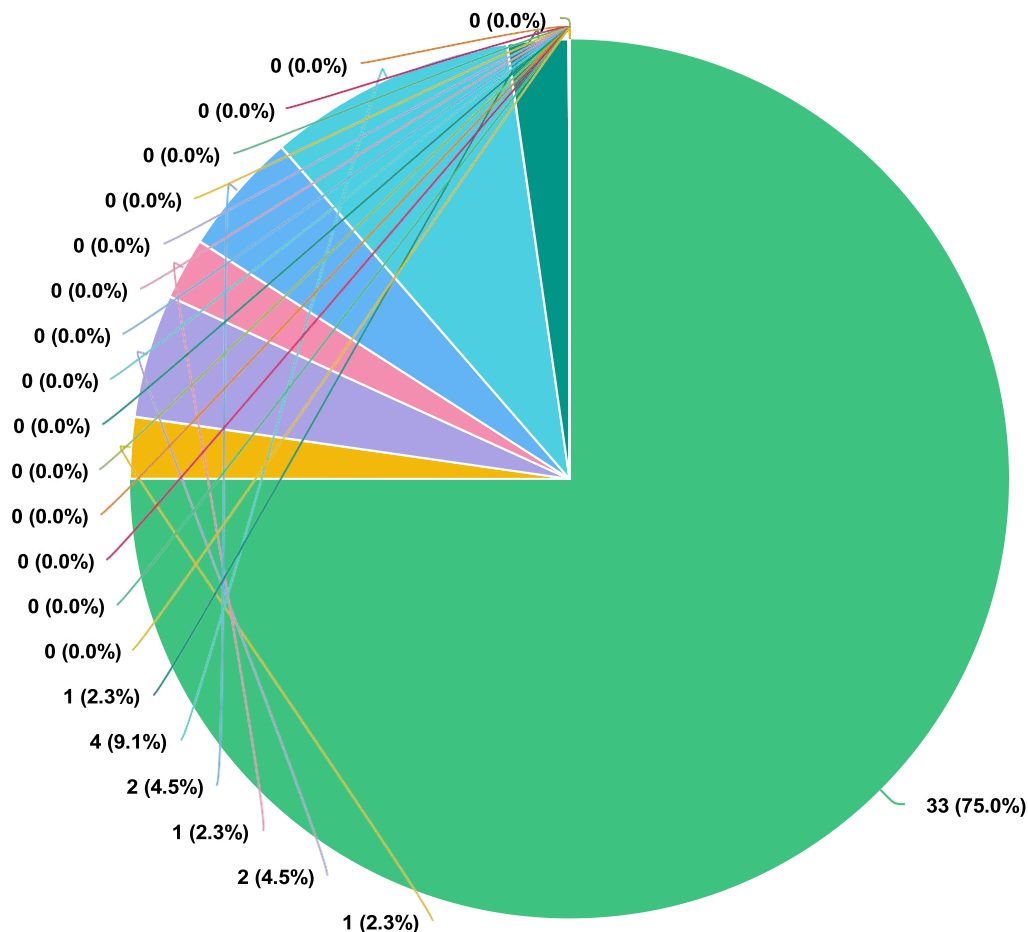
Optional question (45 response(s), 1 skipped)
Question type: Checkbox Question

Q19 Is the gender you identify with the same as your sex registered at birth?**Question options**

☐ No ☐ Prefer not to say ☒ Yes

Optional question (46 response(s), 0 skipped)

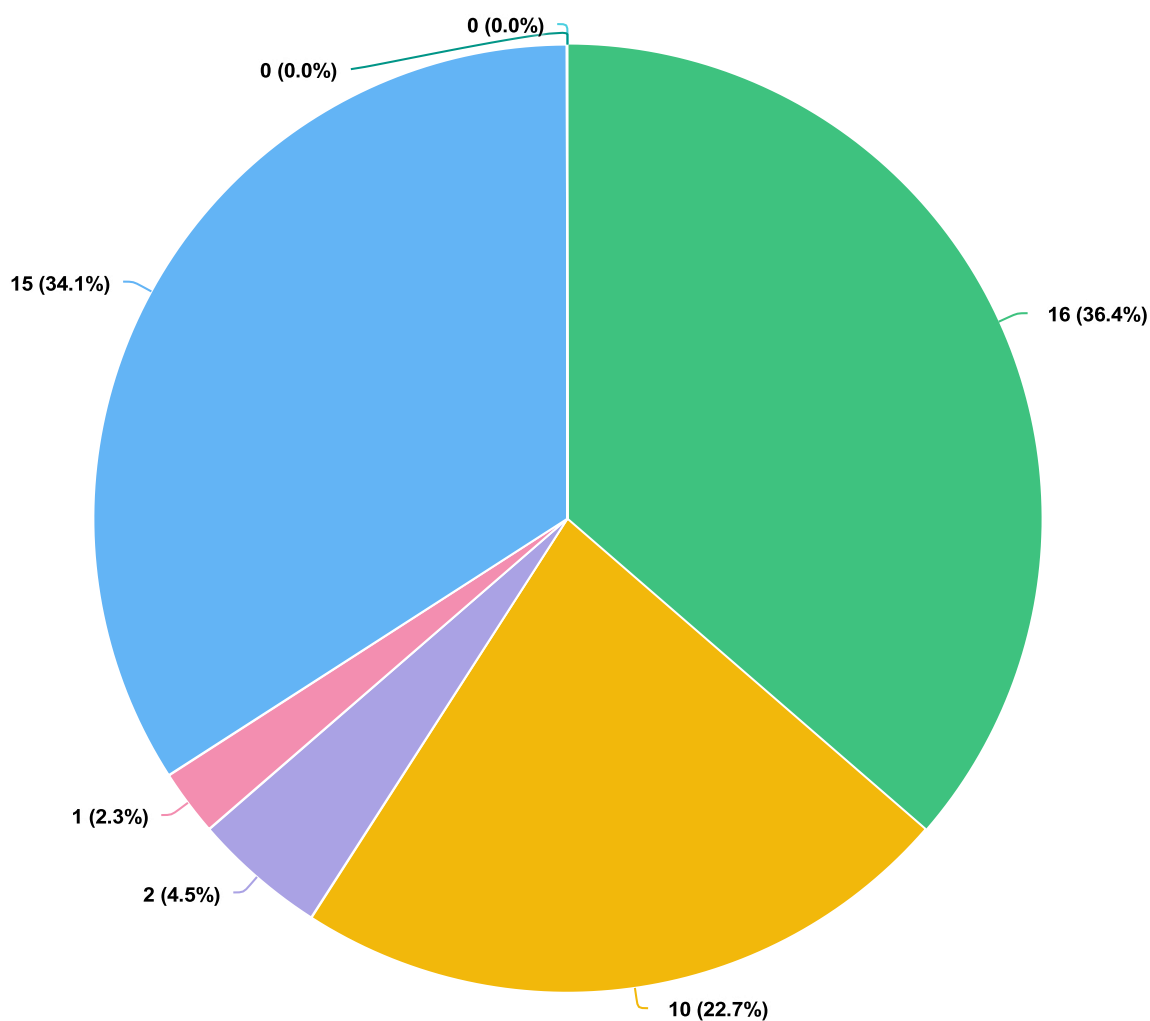
Question type: Checkbox Question

Q20 What is your ethnic group?

Question options

- Any other ethnic group Arab Any other mixed/multiple ethnic background
- Mixed/multiple ethnic groups White and Black African Mixed/multiple ethnic groups White and Black Caribbean
- Any other Black/African/Caribbean background Black/Black British Somali Black/Black British Caribbean
- Black/Black British African Asian/Asian British Chinese Asian/Asian British Vietnamese
- Asian/Asian British Nepali Asian/Asian British Bangladeshi Asian/Asian British Pakistani
- Asian/Asian British Indian White Roma White Gypsy or Irish Travelers Other (please specify)
- Prefer not to say Mixed/multiple ethnic groups White and Asian Any other Asian background
- Any other White background White Irish White English/Welsh/Scottish/Northern Irish/British

Optional question (44 response(s), 2 skipped)

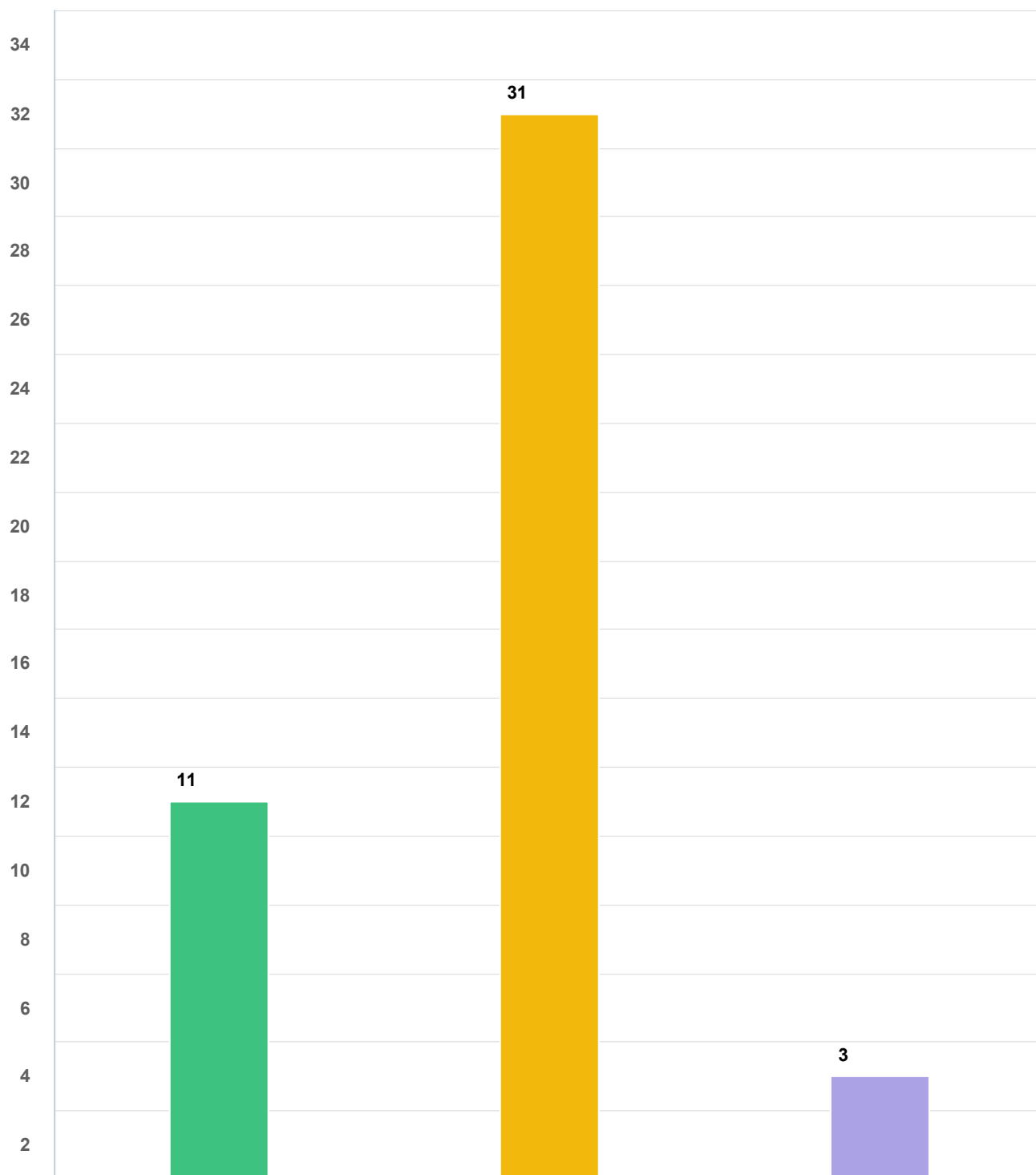
Question type: Dropdown Question

Q21 What is your employment status?**Question options**

- In part-time education
- In full-time education
- Retired
- Not in employment but actively looking
- Not in employment
- Working part time
- Working full time

Optional question (44 response(s), 2 skipped)

Question type: Dropdown Question

Q22 Do you consider yourself to have a long-term health condition and/or disability?**Question options**

☐ Prefer not to say ☐ No ☐ Yes

Optional question (45 response(s), 1 skipped)

Question type: Checkbox Question

Green Party Councillors response to the consultation and engagement strategy 3 December 2025

Purpose and objectives

1. Consultation Charter

The consultation does not explain the relationship of the proposed strategy to the Council's adopted **Consultation Charter**, which frames this work.

At the Councillor briefing on the draft strategy, Councillors were told that the Consultation Charter will be retained and run in parallel to the new strategy. This promises to be confusing for the public and staff.

Surely the Charter is the policy and we suggest that the two documents are integrated.

The Charter has a number of other principles wider than the Gunning principles, adopted by the Council, which should be respected.

2. The **purpose of the strategy is not clear**. It is written as though consultation and engagement is mainly a one-way street i.e. communities feeding *into* improving ECC's service development. The Strategy lacks any clear statement of aims and objectives in one place.

3. There is no explanation or example for how **community voices are integrated into decision - making processes** and how this complements the role of Councillors. There is no articulation of intention by the council for co-creation roles or supporting community-led solutions.

4. The **aims and objectives** of the strategy are not set out in one easy to understand section; (see point on confusing headings below)

Guiding principles

5. **Who to consult?** The draft strategy says nothing about priorities for groups to consult with, rather giving the impression that everybody should have a say on everything on every occasion. In some cases this might be appropriate in other cases those most affected should be the ones that are consulted most deeply. The Council's operating principles relating to this should be set out.

6. What to consult on:

As set out in the Consultation Charter the Council needs to be clear about the issues that will or won't be considering and if new or different ideas are or aren't invited. This could include a description of how the proposals were arrived at.

The Consultation Charter is not clear on who or how a consultation is initiated.

There is no comment on the role of evidence - quantitative or qualitative.

Budgets and other parameters should be shared with the public to enable transparency and inform decision making.

7. Ensuring the Council's position regarding any consultation is made clear.

The recent Grace Road disposal of public land consultation processes (last year and this year's) failed to set out the Council's position on why, as a Council, it was felt that disposal of the field was the best way forward. This lack of transparency, and allowing the developer to provide the consultation material, is very obviously not in line with the aspirations of the draft strategy document.

To ensure that this doesn't happen again, there needs to be statement about making the Council's position clear in relation to any engagement process, whether it is voluntary or a statutory consultation. If necessary there may need to be an independent or legal assessment of the consultation process where the consultation is a legal requirement.

Information and data

8. Setting out easy to understand facts and evidence: Where a consultation involves any technical, scientific or 'hard to understand' information, the Strategy should include something which commits the Council to providing plain English, evidence-based information that enables people to understand the consultation issues. Where technical words are needed they should be used and an explanation provided. For example when consulting on climate change the scientific facts should be shared as the base points.

9. Separating relevant and irrelevant feedback when summarising responses. Best practice is to be clear where responses are not relevant to the questions or consultation objectives, so that the consultation response summary only includes relevant responses. Irrelevant responses can be noted but should be described as such. For example, in Bath and North East Somerset, officer reports relating to a proposed Low Traffic Neighbourhood filtered out all responses that were based on factually incorrect assumptions. In Exeter, by contrast, the Heavitree LTN consultation reported all responses without any filter. This meant that the report showed fears of 'increased air pollution' as by far the biggest concern, yet it was known for certain that the trial would **not** give rise to increased air pollution ie because of the experience of LTNs elsewhere and local and data. The consultation report therefore gave an entirely false impression that air pollution was part of the LTN objectives (it wasn't) and that because so many people said it was their concern, it appeared to give validity to air pollution as a factual issue in relation to the LTN.

10. Better use of data from multiple sources. There's no description of how qualitative data i.e. feedback from the community and community organisations and others in the civic sector will be used and overlaid against other data for example the indices of multiple deprivation

Summarised drafting and unclear meaning

11. The draft strategy document is highly summarised which makes it hard to understand. Unfortunately, it reads in places like an internal document rather than an outward facing strategy document that the public can engage with.

Confusing and unclear headings. For example, the survey asks people to comment on aims and objectives but there is no heading for aims and objectives - instead we have a heading 'understand communities in Exeter' but without any explanation as to what the heading refers to ie is it an aim or objective or the strategy? The following heading 'Define scope and objectives' is very unclear and if it is an aim, it isn't expressed as such, in plain English. **Use of jargon** that will have no meaning for the lay person, for example 'rich data'.

Poorly drafted/highly summarised sentences that do not carry easy or clear meaning by themselves, eg

- “Introduce processes to create consistency, buy-in, and ownership” - processes where, by whom and for whom?
- “Openness and transparency in our work and processes”: openness and transparency by whom, towards who?
- Using ‘we’ in several places to refer to the City Council instead of saying ‘Exeter City Council’.

Methods of engagement

12. Inclusion & engagement methods.

The digital platform might be at the centre of engagement work, however there needs to be a comprehensive plan for community outreach to drive people to engage with a platform and any associated events. There should be a strategic overview kept to determine the level of engagement with the digital platform and other methods to assess their effectiveness (however that is to be defined).

Particular needs may require particular approaches e.g. engagement with young people, people with particular communication needs. There may need to be specialist people who are able to talk other languages or work with those who have complex communication needs. Robust equality impact assessment will be needed and developing a bank of approaches, tools and expertise appropriate to the nature and topic of the consultation will be needed.

The idea of community researchers and volunteers panels are a good ones. However that is not necessarily the same as community representation - or is cross section meant instead?

There needs to be clarity about community representation and support to enable representatives to feed back and engage with their wider community of interest. For example the Tenant Voice representative has to be reachable by all Tenants to be able to advocate for Council tenants - this process has improved over recent years.

13. Community Assemblies: If the council is looking to engage in complex issues, (and the challenges facing us as a society suggest that this will increasingly be the case), then it needs to be prepared to invest in community assembly type methodology. These methods enable a transparently - selected cross sample of the population (selection by transparent criteria) to be able to become informed in a meaningful way on ‘difficult issues’ and deliberate effectively on potential solutions. These are independently facilitated.

14. Consultation expertise:

Consultation and engagement should become embedded in the Council’s approach and be considered part of the transformation work. This should include a budget for consultation and engagement and a commitment set out in the strategy.

In order to be effective, there needs to be skilled people (may or may not be council officers) who are enabling engagement at face-to-face activities.

Officers with relevant skills and experience are likely to be needed to work with council officers who have a technical background in whatever the issue is but no expertise in consultation design, delivery and evaluation.

Consultations for a project may need to be planned over time so the methods and a ranges of approaches, as needed, should be set out as the start of a project.

15. Outdated engagement guidance on disposal of public land

It is noted that the Council may be required, by law, to use outdated methods for statutory consultations. For example: the disposal of public land has guidance dating from the Local Government Act 1972¹, which *'require a local authority wishing to dispose of open space under those powers to advertise its intentions in a local newspaper for two consecutive weeks and to consider objections.'* This cannot be considered a reasonable basic response in 2025 and onwards, given the effective collapse of local print newspapers in Exeter and beyond. The strategy should contain at a minimum a basic level of proposed advertisement methods to consultations that are a minimum alternative for statutory consultations and at best consider if any other approaches are required.

Civil Society Covenant

16. If the Council is serious about the Civil Society covenant then it needs to take **active steps to recognise the voluntary, community, and social enterprise and co-operative sectors**. It is not clear if the definition includes other public bodies and businesses within the scope of the civil society, although we would not understand that to be the case having looked at the Government Website on the Civil Society Covenant.

17. Civil society is commonly understood to comprise community organisations, voluntary sector organisations and social enterprise - including co-operatives. There is currently **no mechanism in place to enable dialogue - that leads to action - between the council and these sectors of civil Society on an equal and partnership basis**. The Council has set up the Place Board and now the Exeter Partnership, (which is on an invitation - only basis) and thus does not recognise representatives from the range of civil society organisations to be able to engage with.

18. **Civil society infrastructure is weak**. There needs to be transparent and fair processes for organisations to be able to participate in mechanisms and consultations. and report back to those who aren't involved. Meetings need to be transparent, with plans, reports, minutes, etc publicly available.

19. **Petitions are an important part of the democratic process**. The survey does not cover how the Council might improve its petitioning system. There have been many petitions received by the Council sent to committees, but some have had no clear response or action taken as a result.

20. If the Council is looking to develop a **consultation and inclusion culture across the city** then it needs to be looking at how the strategy can be used to build this across organisations, both public, civil society and businesses, not just within the Council.

This needs to cover all scales and types of engagement but always with the goal of ensuring that diverse and often excluded voices are heard and involved in creating, or at the least having a chance to have meaningful input to, solutions and decisions that affect them. For example a community organisation might discuss an issue at its AGM and wish to share those discussion outcomes with the council. How could the Council accept their input as valid feedback ie because it is initiated by another organisation and not by a council consultation?

21. Being clear on the difference between collaboration and consultation. The only incidence of the word 'collaboration' in the strategy document is under the key principles heading, with the box 'Collaboration: **"We strive to always involve diverse stakeholders, including residents, local businesses, and community organisations."** This is not what collaboration means and this text highlights the lack of clarity around whether this Strategy is meant to be covering multi-actor collaboration ie a type of engagement where different parties work together to achieve something that they couldn't achieve at all, or as well, working alone. We suggest that the Strategy should have a separate section on the Council's position regarding collaboration with other organisations.

22. The **Councils Partnership Register** could be published/be readily available so that those who are not involved know who to contact if they are interested. This would aid transparency and accountability. This may seem tangential to consultation but partnership working is a logical extension of engagement and involvement.

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Equality Impact Assessment: *Consultation and Engagement Strategy*

The Equality Act 2010 includes a general duty which requires public authorities, in the exercise of their functions, to have due regard to the need to:

- **Eliminate discrimination**, harassment and victimisation and any other conduct that is prohibited by or under the Act.
- **Advance equality of opportunity** between people who share a relevant protected characteristic and people who do not share it.
- **Foster good relations** between people who share a relevant protected characteristic and those who do not

In order to comply with the general duty authorities must assess the impact on equality of decisions, policies and practices. These duties do not prevent the authority from reducing services where necessary, but they offer a way of developing proposals that consider the impacts on all members of the community.

Authorities which fail to carry out equality impact assessments risk making poor and unfair decisions which may discriminate against particular groups and worsen inequality.

Committee name and date:	Report Title	Decisions being recommended:	People with protected characteristics potentially impacted by the decisions to be made:
Executive to recommend to Council 3 rd February 2026	Consultation and Engagement Strategy	<ul style="list-style-type: none"> • Approval, by Council, of the adoption of the Consultation and Engagement Strategy 2025–2028, subject to the amendments set out in section 10.1 of this report. 	As the strategy is designed to enable a diverse and representative voice in engagement work it is like all groups will be affected to some degree

Committee name and date:	Report Title	Decisions being recommended:	People with protected characteristics potentially impacted by the decisions to be made:
		<ul style="list-style-type: none"> • Approval of the recommended changes in response to survey feedback. • Approval of an annual review of the strategy's effectiveness, including a summary of engagement outcomes and lessons learned. 	

Factors to consider in the assessment: For each of the groups below, an assessment has been made on whether the proposed decision will have a **positive, negative or neutral impact**. This is must be noted in the table below alongside brief details of why this conclusion has been reached and notes of any mitigation proposed. Where the impact is negative, a **high, medium or low assessment** is given. The assessment rates the impact of the policy based on the current situation (i.e. disregarding any actions planned to be carried out in future).

High impact – a significant potential impact, risk of exposure, history of complaints, no mitigating measures in place etc.

Medium impact –some potential impact exists, some mitigating measures are in place, poor evidence

Low impact – almost no relevancy to the process, e.g. an area that is very much legislation led and where the Council has very little discretion

Protected characteristic/ area of interest	Positive or Negative Impact	High, Medium or Low Impact	Reason
Race and ethnicity (including Gypsies and Travellers; migrant workers; asylum seekers).	Positive	Medium	<p>2021 Census shows ~90% White with minority groups present. Whilst Gypsy & Traveler accommodation needs are assessed across Devon there may be barriers to engagement local issues.</p> <p>Language needs can affect participation. There may also be cultural barriers to engagement with authorities, as outlined in previous focus groups with Inclusive Exeter.</p> <p>The strategy emphasises inclusive methods to map and understand community need, working with volunteers and community partners, going to where people and communities are and recruiting community panels.</p> <p>There is also a recommendation in the report to strengthen the focus on accessibility</p>
Disability: as defined by the Equality Act – a person has a disability if they have a physical or mental impairment that has a substantial and long-term adverse impact on their ability to carry out normal day-to-day activities.	Positive (although negative where accessible formats / venues not available)	Medium	<p>Disabled people are disproportionately affected by digital exclusion and accessibility barriers, particularly where these intersect with other factors such as age and income.</p> <p>The strategy commits to inclusive engagement activities. However, the report recommends strengthening explicit reference to actions that improve accessibility.</p>
Sex	Positive	Medium	<p>There may be some risk of lower participation from certain groups, due to caring responsibilities, time constraints and 'after dark' safety concerns highlighted in the 2025 residents survey, (greater concern from women). The report recommends the strategy addresses these through explicit reference to flexible formats/times and engagement with VCSE advocate groups.</p>

Protected characteristic/ area of interest	Positive or Negative Impact	High, Medium or Low Impact	Reason
Gender reassignment	Positive	Medium	Although the focus of the strategy on diverse and inclusive voices is likely to be positive, there may be some risks here around disclosure and anonymity, as well as language used in survey material. This is mitigated by the mixed method approach, (going to communities), and the safeguards around anonymity on the digital platform. Survey design is informed by national best practice and engagement with relevant local stakeholders
Religion and belief (includes no belief, some philosophical beliefs such as Buddhism and sects within religions).	Positive	Medium	<p>Exeter's 2021 Census data shows: about 40% Christian, 49% no religion, 2.2% Muslim, 0.5% Hindu, 0.5% Buddhist, 0.2% Jewish, 0.1% Sikh, and 0.7% other religions. Exeter is the most religiously diverse area in Devon, with a higher proportion of minority faiths and non-religious residents than the county average.</p> <p>The strategy is designed to ensure that engagement is inclusive of all religious and belief groups, recognising the diversity of faiths and philosophies in the city. By fostering good relations and advancing equality of opportunity, the strategy aims to remove barriers to participation for people of all faiths and beliefs, as well as those with no religious belief.</p>
Sexual orientation (including heterosexual, lesbian, gay, bisexual)y.	Positive	Medium	The strategy's emphasis on inclusive engagement and anonymous participation supports LGBTQ+ inclusion. Risks may exist around disclosure and language, mitigated by staff training, inclusive forms, and collaboration with LGBTQ+ groups.
Age (children and young people aged 0-24; adults aged 25-50; younger	Positive	High	Standard online survey methods highlights significant underrepresentation of the 16-24 age groups. The strategy

Protected characteristic/ area of interest	Positive or Negative Impact	High, Medium or Low Impact	Reason
older people aged 51-75/80; older people 81+; frail older people; people living with age related conditions. The age categories are for illustration only as overriding consideration should be given to needs).			addresses this through mixed methods, such as representative surveys, partnering with VCSE groups representing younger people. Digital exclusion research commissioned by Exeter City Council highlights that older age demographics are more likely to be excluded. The strategy offers a mixture methods of aimed proportionate and representative engagement which does not solely rely on the digital platform
Pregnancy and maternity including new and breast feeding mothers	Positive	Medium	Pregnant women, new mothers, and breastfeeding mothers may face barriers to engagement, such as limited mobility, childcare responsibilities, and the need for accessible, child-friendly, and breastfeeding-friendly venues. Engagement with relevant VCE advocates. Accessible venues and timings will enable engagement
Marriage and civil partnership status	Neutral	Low	No evidence of significant impact. The strategy is unlikely to affect people differently based on marital or civil partnership status.

Actions identified that will mitigate any negative impacts and/or promote inclusion

- translated materials, community partners (e.g., Refugee Support Devon/CoLab/Wellbeing Exeter), targeted outreach to GRT communities, safe reporting routes.
- accessible venues (step-free, hearing loops), Easy Read, BSL/interpreters, multiple channels (online/offline), assisted digital, reasonable adjustments, inclusive surveys, and co-design with Disabled People's Organisations.
- safe spaces and timings, flexible formats and remote participation, gender-inclusive language.
- anonymous options, staff training, inclusive forms (name/pronouns), confidentiality, clear moderation practices.
- Maintain awareness of clashes with religious festivals, neutral venues, dietary needs, engage faith leaders.
- clear anti-harassment stance, anonymous participation options, inclusive language and imagery, work with LGBTQ+ groups.
- go-to-where-people-are, schools/colleges/University outreach, offline methods, daytime and evening options,

- flexible timing, child-friendly spaces, plain-language materials, translated information, build trust through VCSE partners, particularly advocates of different demographics with protected characteristics.

Officer: Stephen Clayton
Date: 12/12/2025

Consultation Charter

Introduction

Exeter City Council recognises that to deliver effective services and to make decisions that meet the needs of its residents, business and visitors it must consult on the formation and development of its services and policies.

Consultation is just one element of community engagement and feedback and includes activities such as:

- complaints and suggestion schemes
- interviews, polls, surveys and questionnaires
- user and focus groups
- public meetings and residents' panels

This charter sets out our commitment to meeting best practice in consultation and complying with statutory requirements. The Charter covers all consultations, but recognises that some consultations e.g. boundary changes or the Local Plan, are governed by statutory arrangements or dedicated frameworks, which may include specific requirements.

Scope

1. We will consult residents and other stakeholders whenever a decision will directly affect them and when they might have a reasonable expectation that they should be involved. Consultation subjects may extend beyond the remit of the council's responsibilities and any consultation can be proposed through the scrutiny process. Examples of consultations are:
 - Proposals to redevelop areas of the city e.g. South Street
 - Proposals for new facilities e.g. a leisure centre, or skate park
 - Proposals for new equipment e.g. play equipment or park furniture
 - Proposals for how we deal with our assets e.g. tree strategy
 - Proposals to change our services e.g. closure of toilets, opening hours, service levels
 - Proposals to change a policy e.g. taxi licensing
2. All consultations will follow the four 'Gunning Principles', which dictate that consultation:
 - i. must happen before the decision is made
 - ii. must give sufficient context and information
 - iii. should provide enough time for people to think things over
 - iv. should demonstrate real deliberation and thought over the results

Visibility

3. All our consultations will be published on the Council's website so that residents and stakeholders can easily see what is up for decision and how to participate. A schedule of proposed consultations will be published annually on the council's website on 1st April and updated throughout the year.
4. Major consultations (e.g. city-wide or affecting a large number of people) will be publicised by press release and we will use our publications and social media to promote them.
5. The views of those people, communities or areas most affected by a proposal, and those we would expect to contribute, will be sought. However all members of the public and other stakeholders are welcome to respond to a consultation whether or not they have been specifically invited to do so.

Accessibility

6. Surveys and questions and supporting information will be written in an objective, accessible to enable intelligent consideration and responses.
7. We will provide a named contact for each consultation so that residents and stakeholders know who they can speak to about proposals.
8. Taking into account the nature of the decision, a diverse range of respondents and their advocates, including the views of groups frequently excluded or overlooked, will be sought. The views of non-users, especially when service changes are being consulted on, will also be sought.
9. Consultation plans will consider how people with impaired sight or hearing or people whose first language is not English are able to participate fully.
10. Where groups of people with characteristics protected by the Equality Act 2010 may be particularly affected, the consultation plan will identify who they are and how they will be involved, and an Equality Impact Assessment will be included in the final report.
11. We will allow enough time for consultees to consider and respond to the consultation and the information we have provided. Wide scale public consultations, e.g. citywide or large parts of it, should run for a period of not less than six weeks.

Transparency and disclosure

12. Consultation plans will be produced for all consultations. They will include what we are consulting about, and why, who we are consulting, how we will consult them, the timetable for the consultation, who will make the final decision and how we will provide feedback. Consultation plans will follow guidance in 'New Conversations – the Local Government Guide to Engagement'¹

¹ [New Conversations: LGA guide to engagement | Local Government Association](#)

13. Whenever practical, the Council will involve key stakeholders or their representatives in shaping what we will consult on or how we will consult.
14. Where the Council has a preferred option, we will clearly state this in the consultation documents and explain how and why that preference was chosen. Where specific options have been rejected, we will explain why we do not consider them practical. Where options are offered, they should be realistic and deliverable.
15. Any complaints about the consultation will be published so that decision-makers can assess the effectiveness of the consultation before making their decision.
16. Consultations will be at a time when proposals are at a formative stage to allow the results to influence policy or proposal development.

Fair interpretation

17. We will carefully consider all responses to each consultation, analyse responses promptly and objectively and ensure that the product of consultation is conscientiously taken into account when finalising a decision.
18. We will review and evaluate the effectiveness of each consultation to ensure learning is fed into future consultations.

Publication

19. We will publish results detailing the responses received, and explaining how we have taken these into account in arriving at a decision.

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REPORT TO EXECUTIVE

Date of Meeting: 3rd February 2026

REPORT TO COUNCIL

Date of Meeting: Council 3 March 2026

Report of: Strategic Director People and Communities

Title: Amendment to Grants Panel Terms of Reference – Ukrainian Community Grants

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 This report seeks approval to make an amendment to the Exeter City Grants Programme Terms of Reference, (Appendix A with recommended amendments), enabling the City Grants Panel to consider and approve grant funding for Ukrainian community activity as part of the coordinated support model, which also includes a Ukraine Refugee Community Connecting contract. The intention is to integrate this workstream into the existing City Grants governance framework while maintaining transparency, accountability, and alignment with Council priorities.

2. Recommendations:

2.1 That Council approve an amendment to the Grants Panel Terms of Reference to formally include authority for the Panel to make decisions on community grants allocated through the Ukrainian Refugee Support scheme, funded through Homes for Ukraine tariff income. The Ukrainian community activity grants follow the same governance principles, decision making processes, transparency standards and evaluation requirements as those outlined for the City Grant Fund, with modest variations where required to meet the specialised needs of Ukrainian communities.

2.2 That delegated authority be granted to the Director of People & Communities, in consultation with the Portfolio Holder for Communities, to agree future minor amendments to the Grants Panel Terms of Reference where such amendments are administrative in nature, support operational efficiency, or ensure continued alignment with national guidance or funding requirements for Ukrainian support.

3. Reasons for the recommendation:

3.1 The Homes for Ukraine programme has generated dedicated funding intended to support integration, wellbeing, employment readiness, English for speakers of other languages (ESOL) access, youth engagement and community led activity for Ukrainians living in Exeter. A coordinated delivery model including a targeted grants programme has

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been agreed. Integrating the approval mechanism for these grants within the existing City Grants Panel ensures:

- Consistency in governance and transparency
- Efficient use of officer resource
- Continuity with established assessment and decision making processes
- Alignment with Council priorities such as inequality reduction, wellbeing, digital inclusion and community participation

3.2 This extension maintains the integrity of the City Grants Programme while enabling effective and timely deployment of external funding ring-fenced for Ukrainian community support.

4. What are the resource implications including non-financial resources:

4.1 There are no additional financial implications for the General Fund. All Ukrainian community activity grants will be funded from Homes for Ukraine tariff income. Administration will be absorbed within existing Communities Team resource.

5. Section 151 Officer comments:

5.1 There are no additional financial implications for Council to consider.

6. What are the legal aspects?

6.1 The amendment remains within the Council's existing powers to establish and delegate grant decision making arrangements. Alignment with the Grants Panel Terms of Reference ensures decisions continue to be made in accordance with transparent, proportionate and accountable processes.

7. Monitoring Officer's comments:

7.1 The Monitoring Officer has no additional comments.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal no potential impact has been identified on people with protected characteristics as determined by the Act because: this paper only refers to the mechanism by which grant decision will be made and the grant scheme has already been agreed.

9. Carbon Footprint (Environmental) Implications:

9.1 No direct carbon/environmental impacts arising from the recommendations.

10. Report details:

10.1 The scheme addresses identified significant need for targeted community led support for Ukrainian guests in Exeter, including ESOL, employment readiness, wellbeing, youth activities and community integration. A grants programme of £150,000 to April 2027 is proposed. Integrating these grants within the City Grants Panel structure ensures consistency with:

- Existing governance model

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- Assessment and scoring criteria
- Panel composition and conflict of interest provisions
- Publication of minutes and transparent decision making

While Ukrainian grants may require specialised advisory input (e.g., the Ukraine Community Connector), decisions will follow the same structure as the City Grant Fund.

11. How does the decision contribute to the Council’s Corporate Plan?

11.1 The proposal supports Corporate Plan objectives relating to inclusion, wellbeing, community empowerment and reducing inequalities.

12. What risks are there and how can they be reduced?

12.1 Fragmented or inconsistent decision making may occur if a separate process is created. This is mitigated by integration into the existing Grants Panel structure ensures coherence, consistency and transparency.

13. Are there any other options?

13.1 Establish a separate panel – **not recommended** due to duplication, resource intensity and risk of inconsistency.

Strategic Director for People and Communities, Jo Yelland

Author: Stephen Clayton

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

None

List of Appendices:

- Appendix A: City Grants Terms of Reference with proposed amendments

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Exeter Grants Programme

Grants Panel Terms of Reference

June 2025 Revised 6th January 2026

Contents

Background.....	3
Governance	3
Grants Panel Composition.....	3
Transparency and Accountability.....	4
Grant-Making Process and Timetable	4
Exeter Grants Programme Conditions.....	5
Evaluation Framework for Grant Applications	6
Notes	7

Background

The Voluntary & Community and Social Enterprise Sector (VCSE) is a key part of the city's fabric and it delivers extraordinary value for the grant funds allocated from the Council and a wide range of other sources. Their value is so much more than the services or the events our grants fund, their value is also in the social benefits brought to communities through local connectivity, social organisation, leadership and ownership demonstrated through the fantastic things that people achieve in their communities.

The Exeter Grants Programme aims to support community groups and organisations as they continue to work together on local projects that help make Exeter such a great place to live. I am delighted that the council has been able to find a way, despite current financial constraints to ensure that community groups have access to a sustainable grant fund to help them to take action on the things that matter most to them as they take on the opportunities and challenges of a growing city.

Link to Exeter City Council Special Executive 22 January 2024 with details of Community Grants Programme 2024/25 <https://bit.ly/3XnAyZD>

Cllr Matt Vizard Portfolio Holder for Climate, Ecological Change and Communities

Chair of Grant Panel 2025/26

Governance

Good governance that recognises the specific accountability of elected members but enables the Council and community to decide on priorities together

The purpose of the Panel is to provide strategic direction for the Exeter Grant Programme and to ensure that grant awards are made in line with Council priorities and requirements. The Chair will be accountable for ensuring that decisions and recommendations made by the Panel are fair and transparent and that the underpinning system and processes are proportionate to the funding required but that they also recognise the accountability of elected members.

The panel membership will reflect the political make-up of the Council and will include community representatives and advisers. Membership in 2025/26 will be five Councillors with one being the Portfolio Holder who oversees Communities who will be the Chair of the panel. Advisory Members (non-voting) will be invited and are likely to include Director with responsibility for Communities, CEO or representative from Exeter Community Initiatives and Programme Manager for Wellbeing Exeter.

The advisory members will be appointed to provide strategic advice and guidance to the panel.

In 2025/26 the grants available are Ward Grants and the City Grant Fund. The ward grants will be agreed through an established process of ward councillors making decisions on applications for their ward as in previous years. The City Grant Fund process will be overseen by the Exeter Grant Programme Panel.

Grants Panel Composition

- Chair of Panel - Portfolio Holder for Climate, Ecological Change and Communities
- Four other councillors reflecting the political make-up of the Council

Advisory Members (non-voting) will be invited and are likely to include Director with responsibility for Communities, CEO or representative Exeter Community Initiatives and Programme Manager Wellbeing Exeter.

Transparency and Accountability

Conflicts of interest must be declared prior to reviewing applications and attending panel meetings. (Where there is a conflict of interest the panel member will not have a vote, following guidance from the Chair).

The grants process and the grants panel will follow a transparent process, and so:

1. Grant application guidelines will be publicly available.
2. Minutes will be taken at all panel meetings, which will include a brief statement of the reasons for any decision taken on a grant application.
3. Minutes will be published on the [grants website page](#).

Decisions of the panel will be made fairly in line with criteria. There is not a right of appeal.

Grant-Making Process and Timetable

Grants available in 2022/23 are anticipated to be :

City Grant Fund – £50,000 available - grants up to £2,500. As part of City Grant application process, applicants will need to have a minimum of 20% match funding (cash contribution). The maximum award in the year to any one group is £3,000.

Ukraine Wrap Around Support Fund - £150,000 available funded by Homes for Ukraine budget - Decisions around the use of this fund will be made in line with priorities of the City Grant Fund, with a particular focus on supporting the Ukrainian community. For example, addressing inequalities through provision of English for speakers of other languages (ESOL) employment and housing support, and supporting the community to address local needs such as integration and improving wellbeing. Decision making will be supported by the Communities Team and through a newly commissioned Ukrainian Community Connecting Contract also funded through the Homes for Ukraine Budget.

In 2023/24 the City Grants Fund switched from an open rolling programme to a more structured approach opening the grant fund for limited periods 2 or 3 times a year. This is less resource intensive for staff and members and provides flexibility in managing fluctuations in Neighbourhood CIL income. The schedule for each round is set annually.

Priorities

There are 8 key priorities:

1. Address Inequalities
2. Improve Health & Wellbeing
3. Get people active
4. Support communities working together to address local needs
5. Support digital inclusion
6. Encourage volunteering
7. Improve where we live
8. Support community-based arts and cultural activities

3.3 Priority neighbourhoods

Council has agreed that the grants panel should prioritise the priority neighbourhoods over others for City Grants funding.

The priority Neighbourhoods are as follows:

Exwick, Redhills, St Thomas, St David's, City Centre, Newtown, Mincinglake, Beacon Heath, Whipton, Wonford, and Countess Wear.

These areas are priority areas for the city as they are the LSOA's with the highest rate of health inequalities.

The grant process will be administered by the Exeter City Council Communities Team. They will liaise with the Panel Chair to agree applications that broadly meet eligibility criteria that can then progress to the panel, or identify those that need further work that need to be referred back to the applicant.

Exeter Grants Programme Conditions

All grant applications will:

- Be made online through the Council's Exeter Grants website: the application process will be easy to access.
- Only be accepted from constituted bodies with bank accounts in the name of the organization, although small community groups can apply via an umbrella organisation who will hold the funding on their behalf.
- Supported by copies of appropriate policies if required, for example Safeguarding Policy
- Show that the project ties in with one or more of the City Council priorities and how it meets the demands of development across the city.
- Applicants need to have a minimum of 20% cash match funding in place to be considered by the Grants panel
- Show that there is community support for the project: this can be established by demonstrating local people support the project via a small consultation exercise or to evidence need in the local community.
- Be required to provide feedback about how the grant has helped by supplying proof of how fund monies have been spent in the form of invoices, photos and a simple project summary and impact template within 1 month of project completion.

All grant applicants will need to confirm that they understand:

- Funds must only be spent as detailed in the project application.

- Funds cannot be allocated to individuals or private/for-profit enterprises.
- Funds cannot be allocated retrospectively.
- Funds not spent must be returned to Exeter City Council.
- Repayment of the fund can be required at the sole discretion of Exeter City Fund if you supply false information or you do not spend funds within 12 months.
- Repeat funding will not be awarded unless there is a compelling business case proving transition to sustainability.

Evaluation Framework for Grant Applications

Project purpose – what we set out to achieve	
Outputs and Outcomes – what we delivered and what we achieved	
Community Impact Please tell us how the project benefitted the lives of local people. Please feel free to use case studies in this section to document and illustrate the impact your project had	
Beneficiary Numbers Please tell us how many people benefited from the project (must be a number and not words)	
LSOA or Priority Areas Which LSOA or Priority areas, if any, did your project cover?	
Beneficiary Groups Please tell us which of the following beneficiary groups you worked with during your project * You can tick multiple boxes Ethnically diverse communities Lesbian, Gay, Bisexual Transgender and/or Questioning + (LGBTQ+) Physical Disability Learning Disability Elderly People's Group Women's Group Mental Health Support Group Young People None of the Above	
How we spent the money What we spent the money on *	
How do you feel about the project What went well?	
What we would do differently next time	

Top tips for other groups thinking about doing a similar project Please upload evidence: e.g. news articles, photos, feedback from participants *	
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Notes

- Funding applications should be led by community organisations. Collaboration might see groups working with statutory bodies, but the application should be community led
- Applications can be for different elements, activities and services and be viewed as 'new project'
- An Impact Evaluation Framework will be provided with the application guidance and form

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REPORT TO EXECUTIVE

Date of Meeting: 3rd February 2026

REPORT TO COUNCIL

Date of Meeting: 3rd March 2026

Report of: Strategic Director for People and Communities

Title: Temporary Accommodation Allocations Policy

Is this a Key Decision?

No

Is this an Executive or Council Function?

Council

1. What is the report about?

1.1 The report summarises the new Temporary Accommodation Allocations Policy. A copy of the Policy document is appended to the report.

2. Recommendations:

2.1 That Executive recommends that Council approve the adoption of the new Temporary Accommodation Policy.

3. Reasons for the recommendation:

3.1 In April 2025 South West Audit Partnership agency (SWAP) completed an audit on ECC's temporary accommodation service. The audit recommended that ECC develop a formal policy for allocating temporary accommodation; this recommendation was subsequently included on our management action plan

3.2 A temporary accommodation allocations policy establishes a clear, fair and equitable process for the provision of temporary accommodation to eligible people: those who are homeless or threatened with homelessness: and ensures compliance with legislative frameworks.

4. What are the resource implications including non-financial resources:

4.1 The operational elements contained in this policy will be undertaken by existing staff, and resources.

5. Section 151 Officer comments:

5.1 There are no additional financial implications for Council to consider.

6. What are the legal aspects?

6.1 The internal audit carried out by South West Audit Partnership identified that '[t]he council has not published a policy setting out how the council will allocate temporary accommodation or determine what accommodation is suitable'. Accordingly, this policy is designed to address the issues identified by the internal auditor.

6.2 The Homelessness code of guidance for local authorities advises that housing authorities should '....develop policies for the procurement and allocation of temporary accommodation which will help to ensure suitability requirements are met'. This includes taking into account the distance of accommodation from the district where it is not reasonably practicable to secure accommodation within the district.

7. Monitoring Officer's comments:

7.1 This policy is proposed to members following the recommendations of the council's internal auditors. It reflects good practice and is designed to comply with statutory guidance.

8. Equality Act 2010 (The Act)

8.1 In recommending this proposal potential impact has been identified on people with protected characteristics as determined by the Act and an Equality Impact Assessment has been included in the background papers for Member's attention.

9. Carbon Footprint (Environmental) Implications:

9.1 No direct carbon/environmental impacts arising from the recommendations.

10. Report details:

10.1 The policy sets out how ECC will allocate temporary accommodation to people who are homeless or owed a homelessness duty in a fair, transparent and effective way, which makes best use of the temporary accommodation available.

10.2 It provides clarity on the process that determines suitability of placements by considering factors such as.

- location;
- size, condition and facilities in the unit;
- individual health needs;
- household educational and employment needs;
- the significance of any disruption to employment, caring responsibilities or education of the person and their household;
- proximity and accessibility of medical facilities and other support which are currently being provided and are essential to well-being;
- proximity and accessibility of local services, amenities and transport; and
- distance from the 'placing' authority

10.3 The policy describes how ECC will prioritise moves between units of temporary accommodation, when temporary accommodation will end, and makes clear the statutory review rights to an applicant.

For enquiries please contact: democratic.services@exeter.gov.uk

10.4 As this policy reflects Government's Homelessness Code of Guidance and follows the principles set in caselaw public consultation is not recommended. This reflects the principles in the Council's Consultation and Engagement Charter and the new Consultation and Engagement Strategy

11. How does the decision contribute to the Council's Corporate Plan?

11.1 Under the priority area of Homes, one of the intended outcomes is:

"Fewer people will be homeless or in temporary housing".

11.2 Providing a transparent and sustainable offer of temporary accommodation is a vital component of an effective housing and homeless prevention system.

12. What risks are there and how can they be reduced?

12.1 There are reputational risks in not having this policy in place; challenges one allocation decisions of temporary accommodation without a clear policy in place risk the Council being unable to demonstrate our decision-making process which risks suitability reviews which in turn could proceed to Court under Judicial Review.

13. Are there any other options?

13.1 There are no alternatives to the adoption of this policy as it the requirement for this policy is defined in case law *Nzolameso v City of Westminster* April 2015¹. It ensures compliance with the Homelessness Code of Guidance sections 17.49-17.65²

Strategic Director People and Communities, Jo Yelland

Author: James Turner, Interim Head of Service Housing

Local Government (Access to Information) Act 1972 (as amended)

Background papers used in compiling this report:-

- [Homelessness code of guidance for local authorities - Guidance - GOV.UK](#)

List of Appendices:

- Appendix A – Temporary Accommodation Allocations Policy; and
- EQIA - Temporary Accommodation Allocations Policy.

¹ *Nzolameso (Appellant) v City of Westminster (Respondent)* - UK Supreme Court

² [Homelessness code of guidance for local authorities - Chapter 17: Suitability of accommodation - Guidance - GOV.UK](#)

For enquiries please contact: democratic.services@exeter.gov.uk

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Temporary Accommodation Allocations Policy

Contents

1. Introduction	3
2. Allocation of temporary accommodation	3
3. Suitability of temporary accommodation	4
4. Allocation of temporary accommodation outside of the district.....	5
5. Temporary Accommodation Offers & Types of agreement	5
6. Moves	6
7. Pets	6
8. Ending of Temporary accommodation	6
9. Appeals and complaints.....	7
Appendix A: Minimum Size Criteria.....	8
Appendix B: Priority for accommodation in Exeter will be given to:	9
Appendix C: Priority for placements outside of the district	10
Appendix D: Criteria for prioritising moves between temporary accommodation	11

1. Introduction

- 1.1 Under the homelessness legislation housing authorities have various powers and duties to secure 'suitable' accommodation for homeless applicants, either on an interim basis to prevent or relieve homelessness, to meet the main housing duty or as a settled home. Chapter 17 of the Homelessness Code of Guidance¹ relates to how the suitability of interim of main housing duty accommodation is considered.
- 1.2 It is good practice to have a written policy on the procurement and allocation of temporary accommodation, as highlighted in case law – *Nzolameso v City of Westminster* April 2015
- 1.3 This document sets out Exeter City Council's approach to the placement of households it has identified as being owed a statutory duty of interim accommodation or accommodation provided to meet the main housing duty ("temporary accommodation") pursuant to part 7 of the Housing Act 1996 (as amended).
- 1.4 The Policy incorporates the statutory requirements on local authorities in respect of the suitability of accommodation and considers the current legislation and guidance. This policy will be amended to include future changes to legislation/guidance when necessary. It gives due regard to the safeguarding and promotion of the welfare of children in accordance with the Children Act 2004 and details how applicants will be prioritised for temporary accommodation in Exeter and out of the area.

2. Allocation of temporary accommodation

- 2.1 We will work to prevent homelessness and keep people in their homes wherever possible or assist them to find alternative accommodation prior to them becoming homeless. Where this is not possible and people become homeless, or are already homeless when they contact us, we will work together to relieve homelessness as soon as possible.
- 2.2 We will only use temporary accommodation where necessary and only for as short a period as possible.
- 2.3 The council seeks to accommodate homeless households within the district of Exeter and is committed to consider the suitability of this temporary accommodation in relation to the circumstances of the individual household.
- 2.4 All applicants will be assessed to establish the type and location of temporary accommodation which should be offered. The relevant officer will review the options available at the time and offer the most suitable accommodation.
- 2.5 Staff will complete a housing Needs Assessments, Temporary Accommodation Placement and Risk Assessment tab on the IT system to ensure placements are suitable and for effective record keeping.

¹ [Homelessness code of guidance for local authorities - Chapter 17: Suitability of accommodation - Guidance - GOV.UK](#)

3. Suitability of temporary accommodation

3.1 When offering temporary accommodation, the council will consider the suitability of the offer, considering the following factors:

- Location – if suitable accommodation is available within the Council's area, applicants will be placed in Exeter, allowing them to maximise established connections and support networks.
- Size condition and facilities (appendix A) – accommodation must be habitable and provide adequate space for the household.
- Households in temporary accommodation may be placed into units with 1 bedroom less than they would be entitled to on a permanent basis, with the expectation that the living room provides dual purpose as a living and sleeping area.
- In deciding on the fitness of the property, consideration will be given to the length of time needed to complete any necessary repairs and whether it is reasonable to complete these while the property is occupied.
- Health factors – the council will consider health factors, such as an ability to get upstairs, care and support provided by other statutory agencies or the need to access any specialist clinical services that are only available in Exeter.
- If the applicant or a member of the resident household is citing medical grounds that were not identified during the initial assessment, the applicant will be asked to submit medical information within 24 hours.
- The key test in determining the impact of medical issues is whether the condition itself makes the housing offered unsuitable. Problems such as depression, asthma, diabetes or back pain would not normally make a property unsuitable, as the problems would persist in any sort of accommodation.
- Education - The Council seeks to ensure there is minimal disruption to the education of children and young people. Priority for placements in Exeter will be given to those with special educational needs and students who are close to taking public exams. Where a child or young person needs to be placed outside of Exeter every effort reasonable effort will be made to ensure arrangements are, or will be, put in place to meet the child's educational needs
- Employment –The council will consider the need of applicants, who are in paid employment, to reach their normal workplace from the accommodation that is secured. This will include having a regard to both travelling time and the costs associated with this travel.
- Proximity to services - The council will consider the proximity to public transport, primary health care services, and local services in the area in which the accommodation is located.
- The council will have regard to the need to safeguard and promote the welfare of any child or vulnerable adult in the household when making decisions on whether the offer is suitable.
- As a corporate parent to Care Experienced Young People, the council will have regard to their needs and circumstances in determining the suitability of accommodation and consider, where possible and practical, the need to maintain relationships with significant adults (such as ex-foster carer); or the need to avoid certain locations due to childhood experiences.
- Any special circumstance - The council will consider any other reasons put forward by the applicant and come to an overall view about whether the offer is suitable.

Appendix B gives more detail

4. Allocation of temporary accommodation outside of the district

- 4.1 The Council will usually have sufficient temporary accommodation within the district. However, it may be necessary to place outside the district when our owned/ contracted units' temporary accommodation may not be available. For example:

- During the holiday seasons;
- Where individuals have more complex needs;
- Where the household is large or;
- Where there is risk to an individual/ household within the locality

This is not an exhaustive list, and other issues may need to be considered.

- 4.2 When securing accommodation outside of the district we will try to secure accommodation that is as close as possible to the district and area they were previously living in and minimise, where possible disruption with specific regard to employment, caring responsibilities or education of the applicant or members of their household and, where possible, we will seek to retain established links with schools, doctors, social workers and other key services and support.
- 4.3 We will accommodate within our area so far as this is reasonably practicable. "Reasonable practicability" imports a stronger duty than simply being reasonable. But if it is not reasonably practicable to accommodate within our area we will, where possible, try to place the household as close as possible to where they were previously living. There will be some cases where this does not apply. For example, where there are clear benefits in placing the applicant outside of the district, because of domestic violence; or to break links with negative influences within the district; and/or where the applicant does not mind where he/she goes or actively wants to move out of the area.

Appendix C gives more detail on those placed outside of district

5. Temporary Accommodation Offers & Types of agreement

- 5.1 Homeless applicants who are housed under section 188 may initially be placed into accommodation with shared facilities. Where this is non-council owned accommodation, families will be moved to alternative accommodation within 6 weeks to ensure legislative compliance.
- 5.2 There is no restriction on the length of time a household can spend in council owned accommodation with shared facilities.
- 5.3 There is no obligation upon the council to enable applicants to view the accommodation prior to acceptance. In making the offer, the household's individual circumstances will be considered.
- 5.4 If an applicant refuses any offer of temporary, they will be asked to provide their reasons for refusal, and these will be recorded on the client record on the Council's IT system.
- 5.5 The council will consider the reasons given and undertake further enquires as necessary. If the council accepts the reasons for refusal as valid, the offer will be withdrawn and a further offer will be made.

- 5.6 Where applicants refuse suitable temporary accommodation (which may include out of area placements) and the council does not accept their reasons for refusal, and considers that the offer is suitable, applicants will not be offered further accommodation and will be required to make their own arrangements.
- 5.7 Each case will be considered on an individual basis, considering the overall merits of the review request, any new information or evidence that may affect the original decision, and the personal circumstances of the applicant and the potential impact of the loss of accommodation.

6. Moves

- 6.1 We will fully assess the needs of the applicant and the family. We will offer the nearest and most suitable accommodation which is available, and which meets these needs. In certain circumstances we may require another person in temporary accommodation with lesser needs to move to different accommodation to allow us to accommodate a more vulnerable client in a suitable environment.

Appendix D gives more details on the criteria for prioritising moves between temporary accommodation

7. Pets

- 7.1 Where clients have pets but cannot take them to the temporary accommodation the council will assist with finding and securing alternative accommodation for the pet(s). Any associated costs will be re-charged to the client.
- 7.2 The Equality Act 2010 defines the legal basis for assistance dogs which provide additional support or assistance to a disabled person². These dogs will be counted as an essential part of the household and suitable temporary accommodation found.
- 7.3 Emotional support animals are not defined in the Equality Act 2010. Dependent on the facts and circumstances of each case reasonable adjustments will be made to give access to a disabled person's emotional support animal. Where this is not possible the Council will assist with finding and securing alternative accommodation for the animal(s)

8. Ending of Temporary accommodation

- 8.1 As temporary accommodation is provided under a licence agreement there is no requirement for the Council to obtain a Court Order to remove the household from temporary accommodation³ (aside from the condition noted in 8.4)
- 8.2 There are circumstances in which an applicant may be asked to leave temporary accommodation such as:
- Unacceptable behaviour of applicant;
 - Moving to another unit of temporary accommodation;
 - No payment or rent or service charge;

² [Equality Act 2010](#)

³ [Housing Act 1985](#); [Housing Act 1985](#)

- End of homelessness duty;
- Applicant voluntarily ceases to occupy accommodation;
- Applicant is successful in finding alternative accommodation

- 8.3 The facts and circumstance of each case will determine what reasonable notice period is given where the provision of temporary accommodation is ending; 7-14 days for single applicants and up to 28 days for families. However, in some cases it will be necessary to temporary accommodation with immediate effect.
- 8.4 Where a household is provided temporary accommodation under the s193 'main' housing duty and it is necessary to serve a Notice to Quit to begin the process of ending the temporary accommodation. Upon expiry of the Notice to Quit a Court Order will be obtained to remove the household from temporary accommodation. In cases where temporary accommodation is ending due to household's behaviour it may be necessary to seek an injunction on the property to prevent access until due the Notice to Quit and Court Order process can be adhered to.
- 8.4 Under section 11 of the Children Act 2004⁴ the Council has a duty to safeguard and promote the welfare of children. Where the cessation of temporary accommodation involves a household with dependent children the Council will notify the Childrens Social Worker working with the household or make a referral to Childrens Social Services.

9. Appeals and complaints

- 9.1 A nominated senior officer is responsible for overseeing the placing of clients in temporary accommodation.
- 9.2 A senior officer has overall responsibility for ensuring that the right people are placed in the right property on the right type of tenancy.
- 9.3 In making an offer of temporary accommodation we will have taken full consideration for the requirements of the applicant and their family. We will therefore have met our duty to the applicant and if our offer is refused, we are not required to make a further offer.
- 9.4 There is no statutory right of review to our decision under s188 other than by a county court judicial review. However, if an applicant has concerns about any adverse effect the accommodation may have on them or their family, we ask that they discuss this with us.
- 9.5 There is a statutory right to request a review of interim accommodation under s193 and such a review will be considered in line with the review process.
- 9.6 The Housing Service will deal with any complaints in accordance with our complaints policy [Comments, compliments and complaints - Making a complaint - Exeter City Council](#)

⁴ [Children Act 2004](#)

Appendix A: Minimum Size Criteria

Accommodation must provide adequate space and room standards for the household and be fit to inhabit. Households in temporary accommodation will often be placed into units with 1 bedroom less than they would be entitled to on a permanent basis, with the expectation that the living room provides dual purpose as a living and sleeping area.

The following minimum size criteria will apply:

Studio accommodation:

- Single applicants
- Couples
- Lone parents with a child under the age of 12 months.

One bedroom accommodation:

- Lone parents or couples with 1 child over the age of 1 year (no upper age limit)
- Lone parents or couples with 2 children of the same sex (no upper age limit)
- Lone parents or couples with 2 children of opposite sexes where both children are under the age of 10 years.

Two-bedroom accommodation:

- Lone parents or couples with 2 children of opposite sexes where one is over the age of 10 years.

Three-bedroom accommodation:

- Lone parents or couples with between 3 and 6 children.
- Four-bedroom accommodation:
- Lone parents or couples with more than 6 children.

Appendix B: Priority for accommodation in Exeter will be given to:

- (a) The Council is satisfied that members of an applicant's household with a severe and enduring health condition requiring intensive and specialist medical treatment where a move from Exeter would disrupt that treatment and continuity of care.
- (b) The council has confirmed with Devon County Council that the Care Experienced Young Person is from Devon and a move from Exeter would disrupt services provided by the local authority and its relevant partners, education or work.
- (c) Members of an applicant's household who are in receipt of a significant package and range of health care options that cannot be easily transferred.
- (d) Members of an applicant's household with a severe and enduring mental health problem who are receiving psychiatric treatment and aftercare provided by community mental health services and have an established support network where a transfer of care would severely impact on their well-being.
- (e) Households with children registered on the Child Protection Register in Exeter who are linked into local services and where it is confirmed that a transfer to another area would adversely impact on their welfare.
- (f) Households containing a child with special educational needs who is receiving education or educational support in Exeter, where change would be detrimental to their well-being.
- (g) An applicant or a member of their household who have a longstanding arrangement to provide care and support to another family member in Exeter who is not part of the resident household and would be likely to require statutory health and social support if the care ceased.
- (h) An applicant or a member of their household who have a formal arrangement to receive housing related or other support, including addiction help or recovery, and where a move from Exeter would disrupt that support.
- (i) Any other special circumstance will also be considered (including any needs of the children in the household not already identified).
- (j) Whilst priority will be given for these placements, this is dependent on such accommodation being available.

Appendix C: Priority for placements outside of the district

- a) Applicants who have as part of their household, a child or children who are enrolled in GCSE, AS or A level courses or post 16 vocational qualifications in Exeter with exams to be taken within the academic year. Wherever practicable we will seek to place such households within 60 minutes' travelling distance of their school or college.
- b) Wherever practicable, an applicant or a member of their household who works for more than 16 hours per week will not be placed more than one hour travelling distance, each way, by public transport, from their place of employment. Consideration will also be given to the affordability of the travel arrangements needed to each of the places of employment. This will include women who are on maternity leave from employment.
- c) An applicant or a member of their household who is in higher or adult education, vocational or professional training.
- d) Any other special circumstance will be considered (including any needs of the children in the household not already identified). Applicants who meet none of the above criteria are likely to be offered properties outside of Exeter.

If placed outside Exeter the council may offer assistance and support for a reasonable period, on a case-by-case basis. Support may include help with or signposting to:

- Finding employment
- Identifying and arranging schools
- Childcare
- Health e.g. signing up with a local GP
- Council links e.g. Council Tax, electoral register
- Welfare benefits
- Utility connections (i.e. electricity/gas/phone/internet)
- Removals and assistance with identifying appropriate storage
- Identifying links to local support e.g. contact with community, voluntary, faith and other groups
- Financial assistance with immediate resettlement costs

The package will be kept under review and amended as required to ensure the provision of appropriate support.

Appendix D: Criteria for prioritising moves between temporary accommodation

Transfers between TA will be prioritised in the following order:

1. Transfer from TA found to be in serious disrepair that poses threat to life.
2. Transfer from TA because of evidenced critical medical need e.g. TA accessed by stairs and tenant unable to negotiate.
3. Transfer from non-council shared accommodation for families who have been in occupation for at least 5 weeks (to avoid penalties of sharing accommodation beyond 6 weeks).
4. Transfer from TA found to be unsuitable following a review.
5. Transfer from Private Sector Leased property is at least 5 months beyond lease expiry date.
6. Transfer because of evidenced serious medical need.
7. Transfer from TA found to be in serious disrepair that cannot be rectified while the tenant is in situ.
8. Transfer from expensive TA to cheaper units.
9. Transfer for overcrowding/under occupation.

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Equality Impact Assessment: Temporary Accommodation Allocations Policy

The Equality Act 2010 includes a general duty which requires public authorities, in the exercise of their functions, to have due regard to the need to:

- **Eliminate discrimination**, harassment and victimisation and any other conduct that is prohibited by or under the Act.
- **Advance equality of opportunity** between people who share a relevant protected characteristic and people who do not share it.
- **Foster good relations** between people who share a relevant protected characteristic and those who do not

In order to comply with the general duty authorities must assess the impact on equality of decisions, policies and practices. These duties do not prevent the authority from reducing services where necessary, but they offer a way of developing proposals that consider the impacts on all members of the community.

Authorities which fail to carry out equality impact assessments risk making poor and unfair decisions which may discriminate against particular groups and worsen inequality.

Committee name and date:	Report Title	Decisions being recommended :	People with protected characteristics potentially impacted by the decisions to be made:
03/02/2026	Temporary Accommodation Allocations Policy	To publish Temporary Accommodation Allocations Policy	Race & ethnicity Disability Sex Gender reassignment Religious belief Sexual Orientation Age Pregnancy & maternity Marriage & civil partnership

Factors to consider in the assessment: For each of the groups below, an assessment has been made on whether the proposed decision will have a **positive, negative or neutral impact**. This must be noted in the table below alongside brief details of why this conclusion has been reached and notes of any mitigation proposed. Where the impact is negative, a **high, medium or low assessment** is given. The assessment rates the impact of the policy based on the current situation (i.e. disregarding any actions planned to be carried out in future).

High impact – a significant potential impact, risk of exposure, history of complaints, no mitigating measures in place etc.

Medium impact – some potential impact exists, some mitigating measures are in place, poor evidence

Low impact – almost no relevancy to the process, e.g. an area that is very much legislation led and where the Council has very little discretion

Protected characteristic/ area of interest	Positive or Negative Impact	High, Medium or Low Impact	Reason
Race and ethnicity (including Gypsies and Travellers; migrant workers; asylum seekers).			<p>Data from the 2021 Census Profile for the Exeter authority reports that 1.7% of the local population identified as Asian, Asian British or Asian Welsh (9.3% for England and Wales), 0.3% identified as Black, Black British, Black Welsh, Caribbean or African (4.0% for England and Wales), 1.4% of the local population identified as mixed or multiple ethnic groups (2.9% for England and Wales) and 0.5 % identified as another ethnic group (2.1% for England and Wales), 96% of the local population identified as White (81.7% for England and Wales).</p> <p>Data taken from Exeter City Councils client information system for the period April 24 to April 25 records that 320 people were accommodated in the Authorities temporary accommodation provision. Of the 320 persons accommodated 3.13% were Asian other, 0.31% other Black / African Caribbean, 2.50% any other ethnic group ,0.94% mixed multiple ethnic background, 0.31% Asian / British / Pakistani, 0.31% Asian/ British/ Bangladeshi, 2.50% Black /African/Caribbean/Black British, 0.63% Black/Caribbean/Black British, 0.31% White/Black African, 0.63% White / Black</p>

	Negative	Low	<p>Caribbean, 0.94% White/Asian, 1.25% Arab, 79.06%, White/English/Welsh/Scottish/Ni, 0.63% White Gypsy/Irish Traveller, 3.75% Other white, 1.56% didn't know/ refused and 0.25% did not respond.</p> <ul style="list-style-type: none"> Negative low impact for customers with specific cultural needs in accommodation sharing communal facilities with other ethnic groups, for example sharing food preparation surfaces in communal kitchens where halal or kosher foods are being prepared. In mitigation of this impact the authority has adequate provision to place individuals / families in these groups in self-contained accommodation. All self-contained units of the authority's temporary accommodation provision are accessible to all ethnic groups. Where English is not a customer's first language documents can be translated into the relevant language
<p>Disability: as defined by the Equality Act – a person has a disability if they have a physical or mental impairment that has a substantial and long-term adverse impact on their ability to carry out normal day-to-day activities.</p>	Negative	Medium	<p>Data from the 2021 Census Profile for the Exeter authority reports that 7.3% of the local population identified as disabled under the Equality Act with day-to-day activities limited a lot, 11.6% of the local population identified as disabled under the Equality Act with day-to-day activities limited a little. 81.1% reported as not disabled under the Equality Act.</p> <p>Data from the 2021 Census Profile report that 17.8% of the population of England and Wales identified as disabled under the Equality Act and 82.2% as not disabled under the Equality Act.</p> <p>Data taken from Exeter City Councils client information system for the period April 24 to April 25 records that 320 people were accommodated in the Authority's temporary accommodation provision. Of the 320 persons accommodated 4.69% had a disability, 4.10% no disability and, 91.25% did not respond, 2.50% had a learning disability, 6.56% no learning disability and 90.94% did not respond.</p> <ul style="list-style-type: none"> High medium impact of placing customers with physical disabilities in the authority's temporary accommodation provision as there are few temporary accommodation units that are DDA (Disability Discrimination Act) compliant and / or level access, ground floor. Consequently, if ECC

	Negative	Low	<p>were to have a spike in demand for adapted units it may not be able to meet it within our current temporary accommodation portfolio. Such spikes are unusual; any impact is mitigated by utilising the local commercial hotel provision to access the appropriate facilities.</p> <ul style="list-style-type: none"> • Low negative impact of placing customers with some diagnosed and treated mental health conditions, for example depression and anxiety, in the authority's temporary accommodation provision as such issues would not normally make a property unsuitable, as the problems would persist in any sort of accommodation. • High negative impact of accommodating customers with learning disabilities (where the authority has a lawful duty to place) in the authority's temporary accommodation provision when appropriate support and enabling interventions are not in place nor are access to specialist medical or care services are not available to the customer. Mitigation can be reached by close working with DCC to ensure appropriate support for customer. • Low negative impact of risk to self and others that may result from the above are mitigated by utilising a limited number of bed spaces available in the authority's contractor managed accommodation where 24 - hour monitoring is in place and an out of hours service is available.
	Negative	Medium	
	Negative	Low	
Sex			<p>Data from the 2021 Census Profile for the Exeter authority reports that 51% of the local population were female and 48.7% were male.</p> <p>Data taken from Exeter City Councils client information system for the period April 24 to April 25 records that 320 people were accommodated in the Authorities temporary accommodation provision. Of the 320 persons</p>

	Negative	Low	<p>accommodated 46.88% were female, 52.19% were male, 0.31% preferred not to say and 0.63% did not respond.</p> <ul style="list-style-type: none"> • Low negative impact relating to the absence of an exclusively targeted provision as all accommodation is accessible to all sexes • Low positive impact as six units of temporary accommodation are allocated by the authority for single male use only (not exclusive when demand is high) and six for single female use only (not exclusive when demand is high). • Low negative impact when the authority does not have availability in its temporary accommodation provision to accommodate customers fleeing domestic abuse. Commercial hotels in the local area (or out of area), or refugee spaces can be utilised to accommodate customers.
	Positive	Low	
	Negative	Low	
Gender reassignment	Negative	Low	<p>Gender identity: 92.9 % said they had the same sex as registered at birth, 0.02% said they had a different identity from the sex they had registered at birth, but no specific identity given. 0.01% identified as a Trans woman, 0.1% as a Trans man, 0.1% as non-binary, 0.1% all other gender identities, 6.5% did not respond.</p> <ul style="list-style-type: none"> • All self-contained units of the authority's temporary accommodation provision are accessible to all customers.
Religion and belief (includes no belief, some philosophical beliefs such as Buddhism and sects within religions).			<p>Data from the 2021 Census Profile for the Exeter authority reports that 44.6% of the local population said they had no religion or belief (37.2 % for England and Wales), 46.6% said they were Christian (46.2 % for England and Wales), 0.4% Buddhist (0.5% for England and Wales), 0.7% Muslim (6.5% for England and Wales), 0.2% Hindu (1.7% for England and Wales), 0.1% Jewish (0.5% for England and Wales), 0.6% Sikh (0.6% for England and Wales) and 6.7% failed to answer (6.0% for England and Wales).</p>

	Negative	Low	<p>Data taken from Exeter City Councils client information system for the period April 24 to April 25 records that 320 people were accommodated in the authority's temporary accommodation provision. Of the 320 persons accommodated 1.88% said they were atheist, 3.44% Christian, 0.33% Islamic, 0.31% Spiritism, 8.75% no religion, 1.88% not known, 81.56% did not respond and 1.56% said other.</p> <ul style="list-style-type: none"> • Negative low impact for customers with specific cultural needs in accommodation sharing communal facilities with other ethnic groups, for example sharing food preparation surfaces in communal kitchens where halal or kosher foods are being prepared. • In mitigation of this impact the authority has adequate provision to place individuals / families in these groups in self-contained accommodation. • All self-contained units of the authority's temporary accommodation provision are accessible to all ethnic groups.
Sexual orientation (including heterosexual, lesbian, gay, bisexual).			<p>Data from the 2021 Census Profile for the Exeter authority reported that 5.3% of the local population identify as either gay, lesbian, bisexual, pansexual, asexual, queer or other sexual orientation, 86.2% as either straight or heterosexual and 8.5% failed to answer.</p> <p>Data taken from Exeter City Councils client information system for the period April 24 to April 25 records that 320 people were accommodated in the authority's temporary accommodation provision. Of the 320 people accommodated 77.81% identified as heterosexual, 1.25% as bisexual, 1.88% as</p>

	Positive	Low	<p>lesbian / gay, 1.25% as other, 16.56% preferred not to say and 1.25% did not respond.</p> <ul style="list-style-type: none"> • Positive low impact as there is no evidence to support a specific impact and no targeted provision in the authority's temporary accommodation provision relating to sexual orientation. • All temporary accommodation / services are equally accessible regardless of sexual orientation.
<p>Age (children and young people aged 0-24; adults aged 25-50; younger older people aged 51-75/80; older people 81+; frail older people; people living with age related conditions. The age categories are for illustration only as overriding consideration should be given to needs).</p>	Positive	Low	<p>Data from the 2021 Census Profile for the Exeter authority reported that the majority of the local population, 17.7%, were aged between 35 and 49, 16.5% were aged between 50 and 64, 13.8% were aged between 25 and 34, 12.5% were aged between 20 and 24, 8.6% were aged between 65 and 74, 8.1% were aged between 16 and 19, 5.6% were aged between 10 and 15, 5.6% were aged between 75 and 84, 4.7% were aged between 5 and 9, 4.5% were under the age of 4, 2.5% were over the age of 85 and 4.1% were over the age of 60.</p> <p>Data taken from Exeter City Councils client information system for the period April 24 to April 25 records that 320 people were accommodated in the authority's temporary accommodation provision. Of the 320 persons accommodated 0.63% were aged between 16 and 17, 29.69% were aged between 18 and 25, 23.13% were aged between 26 and 35, 23.75% were aged between 36 and 45, 12.19% were aged between 46 and 55, 10.63% were aged 56 and over.</p> <ul style="list-style-type: none"> • Low positive impact of placing customers in all age groups in the authority's temporary accommodation provision as suitable offers are typically available within the authorities' boundaries that meet the needs of individual groups in this area of interest. For example, customers with school age children or the elderly and frail are typically placed in accommodation as close to their schools, GP Surgeries and Hospitals as possible to reduce travel time and maximise affordability. • Low negative impact to customers with children placed in the authority's temporary accommodation provision where certain circumstances require them to move or exchange their allocated unit of

	Negative	Low	accommodation within it to allow another customer with greater needs or vulnerabilities associated with age to occupy it.
Pregnancy and maternity including new and breast-feeding mothers	Negative	Low	<p>There is no data available from the 2021 Census Profile.</p> <p>Data taken from Exeter City Councils client information system for the period April 24 to April 25 records that 320 people were accommodated in the authority's temporary accommodation provision. Of the 320 persons accommodated, 150 were female. Of the 150 females, 2.50% said they were pregnant, 18.44% said they were not pregnant and 25.94% did not respond.</p> <ul style="list-style-type: none"> Low negative impact relating to customers who are pregnant and / or breast feeding and are placed in the authority's temporary accommodation provision, customers in this group are typically prioritised for placements in self-contained units (when available) where there is a higher level of monitoring and light touch support available.
Marriage and civil partnership status	Neutral Impact	Low	<p>Data from the 2021 Census Profile for the Exeter authority report that 33.2% of the local population were either never married or in a civil partnership (37.9% for England and Wales), 47.5% were married or in a civil partnership (44.6% for England and Wales), 2.1% were separated but still married or in a civil partnership (2.2% for England and Wales), 10.1% were divorced or had a civil partnership dissolved (9.1% for England and Wales) and 7.1% were widowed or surviving a partner in a civil partnership, (6.1% for England and Wales).</p> <ul style="list-style-type: none"> Usage data on marriage and civil partnership status is not routinely collected by Exeter City Councils client information system. Neutral low impact as all temporary accommodation / services are equally accessible regardless of status