

Public Document Pack



CYNGOR SIR
YNYS MÔN
ISLE OF ANGLESEY
COUNTY COUNCIL

Mr Dylan Williams
Prif Weithredwr – Chief Executive

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RHYBUDD O GYFARFOD	NOTICE OF MEETING
PWYLLGOR GWAITH	THE EXECUTIVE
DYDD MAWRTH 25 TACHWEDD 2025 10.00 o'r gloch	TUESDAY 25 NOVEMBER 2025 10.00 am
YSTAFELL BWYLLGOR, SWYDDFEYDD Y CYNGOR AC YN RHITHIOL DRWY ZOOM	COMMITTEE ROOM, COUNCIL OFFICES AND VIRTUALLY VIA ZOOM
Swyddog Pwyllgor	Ann Holmes 01248 752518 Committee Officer

AELODAU/MEMBERS

Plaid Cymru/The Party of Wales

Neville Evans, Carwyn E Jones, Dyfed Wyn Jones, Gary Pritchard, Alun Roberts, Nicola Roberts, Robin Wyn Williams

Y Grŵp Annibynnol/The Independent Group

Dafydd Roberts, Ieuan Williams

COPI ER GWYBODAETH / COPY FOR INFORMATION

I Aelodau'r Cyngor Sir / To the Members of the County Council

Bydd aelod sydd ddim ar y Pwyllgor Gwaith yn cael gwahoddiad i'r cyfarfod i siarad (ond nid i bleidleisio) os ydy o/hi wedi gofyn am gael rhoddi eitem ar y rhaglen dan Reolau Gweithdrefn y Pwyllgor Gwaith. Efallai bydd y Pwyllgor Gwaith yn ystyried ceisiadau gan aelodau sydd ddim ar y Pwyllgor Gwaith i siarad ar faterion eraill.

A non-Executive member will be invited to the meeting and may speak (but not vote) during the meeting, if he/she has requested the item to be placed on the agenda under the Executive Procedure Rules. Requests by non-Executive members to speak on other matters may be considered at the discretion of The Executive.

Please note that meetings of the Committee are streamed for live and subsequent broadcast on the Council's website. The Authority is a Data Controller under the Data Protection Act and data collected during this live stream will be retained in accordance with the Authority's published policy.

A G E N D A

1. APOLOGIES

2 DECLARATION OF INTEREST

To receive any declaration of interest from any Member or Officer in respect of any item of business.

3 URGENT MATTERS CERTIFIED BY THE CHIEF EXECUTIVE OR HIS APPOINTED OFFICER

No urgent matters at the time of dispatch of this agenda.

4 MINUTES (Pages 1 - 8)

To submit for confirmation, the draft minutes of the meeting of the Executive held on 21 October 2025.

5 THE EXECUTIVE'S FORWARD WORK PROGRAMME (Pages 9 - 18)

To submit the report of the Head of Democratic Services.

6 AMENDMENT TO THE CONSTITUTION – FINAL APPROVAL OF THE COUNCIL'S ANNUAL ACCOUNTS (Pages 19 - 24)

To submit the report of the Director of Function (Council Business)/Monitoring Officer.

7 SCORECARD MONITORING - QUARTER 2, 2025/26 (Pages 25 - 42)

To submit the report of the Head of Profession, HR and Transformation.

8 SELF-ASSESSMENT AND PERFORMANCE (WELLBEING) 2024/25 (Pages 43 - 104)

To submit the report of the Head of Profession, HR and Transformation.

9 REVENUE BUDGET MONITORING - QUARTER 2, 2025/26 (Pages 105 - 130)

To submit the report of the Director of Function (Resources)/Section 151 Officer.

10 CAPITAL BUDGET MONITORING – QUARTER 2, 2025/26 (Pages 131 - 144)

To submit the report of the Director of Function (Resources)/Section 151 Officer.

11 HOUSING REVENUE ACCOUNT BUDGET MONITORING – QUARTER 2, 2025/26 (Pages 145 - 154)

To submit the report of the Director of Function (Resources)/Section 151 Officer.

- 12 COUNCIL TAX BASE FOR 2026/27** (Pages 155 - 160)
To submit the report of the Director of Function (Resources)/Section 151 Officer.
- 13 CONNECT TO WORK PROGRAMME 2025 - 2030** (Pages 161 - 244)
To submit the report of the Head of Regulation and Economic Development.
- 14 ACCEPTANCE OF GRANT FUNDING OFFER FROM AMBITION NORTH WALES** (Pages 245 - 252)
To submit the report of the Head of Regulation and Economic Development.
- 15 VISITOR LEVY** (Pages 253 - 260)
To submit the report of the Head of Regulation and Economic Development.

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THE EXECUTIVE

Minutes of the hybrid meeting held on 21 October 2025

- PRESENT:** Councillor Gary Pritchard (Leader)(Chair)
- Councillors Carwyn Jones, Alun Roberts, Dafydd Roberts, Nicola Roberts, Robin Williams.
- IN ATTENDANCE:** Chief Executive,
Deputy Chief Executive,
Director of Function (Resources)/Section 151 Officer,
Director of Function (Council Business)/Monitoring Officer,
Director of Education, Skills and Young People,
Director of Social Services,
Head of Democracy,
Committee Officer (MEH),
Webcasting Committee Services Officer (FT).
- APOLOGIES:** Councillors Neville Evans, Dyfed W Jones & Ieuan Williams
- ALSO PRESENT:** Councillors Jeff Evans (Chair of the Corporate Scrutiny Committee) (for items 6 & 8), Glyn Haynes, Kenneth P Hughes & Aled Morris Jones.
- Scrutiny Manager (AD) (for items 6 & 8)

At the end of the meeting, the Chair of the Corporate Scrutiny Committee wished to express his gratitude to Mrs Anwen Davies, the Scrutiny Manager, who will be leaving her post at the end of the month, for her support and work to the Authority and especially to the Scrutiny process of the Council.

1 APOLOGIES

As noted above.

2 DECLARATION OF INTEREST

No declaration of interest was received.

3 URGENT MATTERS CERTIFIED BY THE CHIEF EXECUTIVE OR HIS APPOINTED OFFICER

None to report.

4 MINUTES

The minutes of the previous meetings of the Executive held on 23 September, 2025 and the extraordinary meeting held on 2 October, 2025 were presented for confirmation.

It was RESOLVED that the minutes of the following previous meetings of the Executive be confirmed as correct:-

- **Minutes of the meeting held on 23 September, 2025;**
- **Minutes of the Extraordinary meeting held on 2 October, 2025.**

5 THE EXECUTIVE'S FORWARD WORK PROGRAMME

The report of the Head of Democracy incorporating the Executive's Forward Work Programme for the period November 2025 to June 2026 was presented for confirmation.

The Head of Democracy updated the Executive on the new additions to the Forward Work Programme as follows:-

- 25 November 2025 meeting - Terms of Reference of the Governance and Audit Committee / Approval of Final Accounts.
- 25 November 2025 meeting - DWP Connect to Work Programme – Collaboration Agreement (item move from the October meeting).
- 25 November 2025 meeting - Ambition North Wales grant offers
- June 2026 meeting – Performance Quarterly Reports & Quarter 1 budget reports, 2026/2027.

It was resolved to confirm the Executive's updated Forward Work Programme for the period November 2025 to June 2026.

6 COMPLAINTS AND WHISTLEBLOWING 04/2024 - 03/2025

The report of the Director of Function (Council Business)/Monitoring Officer incorporating information on service complaints for the period 1 April, 2024 to 31 March, 2025 was presented to the Executive for consideration.

Councillor Carwyn Jones, the previous Portfolio Member for Corporate Business and Customer Experience, presented the report which showed the data of complaints and whistleblowing for 2024/2025.

The Director of Function (Council Business)/Monitoring Officer reported that the Complaints and Whistleblowing Annual Report is presented to the Governance and Audit Committee and includes the Public Services Ombudsman's Annual Letter. The Council's services have validated the data within the report and have agreed the analysis of the complaints. She noted that the Complaints Officers have received training during the year, and the policy has been updated to reflect the introduction of stage 1 and 2 complaints, and the concept of concerns have been removed as is noted in detail in paragraph 3.2 of the report. 3.5 of the report details the services that received complaints during the period 2024/2025 as shown in

Appendix 2. Highways and Property are underperforming as there has been an increase in complaints from 19 in the previous year to 49 in 2024/2025. There was also underreporting in Q1 and Q2 in 2024/2025. She further said that there were improvements in the complaints within the Housing Service from 139 complaints in the previous year to 47 during 2024/2025 and noted that the previous problems resulted from new software that has been introduced. However, whilst there has been an improvement in the number of the complaints received the level of those upheld was high and it is evident that there was underreporting in Q1 and Q2 in the current year. 93% of the complaints received by the Leisure Service were upheld and suggested a need for training of staff in recording complaints rather than recording requests for service. There has been a high level of performance within the Planning Service and Waste Service, and no concerns were raised as regards to late responses.

The Director of Function (Council Business)/Monitoring Officer further reported on the Public Services Ombudsman's Annual Letter and noted that the number of complaints has decreased from 38 in the previous year to 22 in 2024/2025. She noted that the main message from the Public Services Ombudsman's Letter is that 24% of the complaints in the previous year related to the Council's process in dealing with complaints. This resulted in 10 interventions by the Ombudsman in the previous year, however in 2024/2025 there was a decrease to 5% with only one intervention. Additional details are included in Section 4 of the report.

She further referred that the Council's Complaints Policy which places an emphasis on learning from mistakes and using the information to improve services. There is a need for more robust management within the Highways and Property and Housing Services, along with further training for the Leisure Service. There is a need to act earlier on the Ombudsman's recommendations and to ensure that actions taken are reported to the Ombudsman within the period set out by the Ombudsman. She further said that action plans are required to improve performance where necessary and that Complaints Officers need to undertake training on Equalities and Customer Care now that the training sessions on the CRM have been completed. A review will be undertaken on the CRM in three months and the roll out of the Power BI Dashboard for Directors/Heads of Service/Managers will be undertaken shortly and further guidance will be provided to highlight the need for consistency.

The Leader said that details within Section 4 of the report are important as regards to lessons learnt and it is accepted that some services will receive a higher level of complaints owing to the nature of the services which they provide. There is also a requirement to be more consistent in responding to complaints and the need to identify whether a complaint is a stage 1 complaint against the service. He asked whether there had been compliance with the recommendations made in the Ombudsman's Letter. This was confirmed but it was made clear that the Council had not completed some of the actions in time and had not responded to the Ombudsman within the requested timeframe. The Director of Function (Council Business)/Monitoring Officer said that there were 6 recommendations made by the Ombudsman but that these related to 2 cases. The recommendations were implemented and reported to the Ombudsman. However, as they were not reported within the timeframe they were not captured within the Annual Letter.

It was RESOLVED:-

- **To implement, as soon as possible: -**
 - **the introduction of the Power BI dashboard for Heads of Service and Directors, in relation to complaints about their service;**
 - **training for complaints officers, and their deputies, on customer care and equalities/diversity;**
 - **updated guidance note on effective complaints handling.**
- **That having considered the Annual Letter from the Public Services Ombudsman (PSOW) for 2024/2025, to require that current performance data on service complaints become a standing item in the routine meetings between Heads of Service/Directors and their Executive lead (Portfolio Holder).**
- **To instruct the Monitoring Officer to remind services of the requirement to:**
 - **action any recommendations from the PSOW, and report completion to the PSOW, within the timeframe set;**
 - **routinely record any lessons learnt from complaints, identifying any patterns and implementing suitable mitigation measures.**
- **To instruct the Monitoring Officer to respond to the PSOW's Annual Letter 2024/202, as required in the penultimate paragraph of the said Letter.**

7 OUTCOME OF THE STATUTORY CONSULTATION ON THE PROPOSAL TO RELOCATE YSGOL UWCHRADD CAERGYBI LEARNERS TO A NEW SCHOOL BUILDING FOR 11-18 YEAR OLDS

The report of the Director of Education, Skills and Young People incorporating the outcome of the statutory consultation on the proposal to relocate Ysgol Uwchradd Caergybi learners to a new school building for 11-18 year olds was presented for the Executive's consideration.

The Portfolio Member for Education and the Welsh Language presented the report noting that the report focuses on the outcome of the consultation process on the proposal to relocate Ysgol Uwchradd Caergybi to a new school building. The Council has a duty under the Schools' Organisation Code to consult with stakeholders when considering school reorganisation proposals. A consultation process was undertaken between 5 June, 2025 to 17 July, 2025 to relocate Ysgol Uwchradd Caergybi to a new site. Consultation was undertaken which included with children and young people, parents and Estyn regarding the proposal to relocate the school to a new site.

The Director of Education, Skills and Young People reported that there has been challenges as to the condition of Ysgol Uwchradd Caerbyi's present building due to RACC. The statutory consultation was undertaken to comply with the guidance. Other options were also considered for Ysgol Uwchradd Caergybi and it was concluded that the relocation of the school was the most appropriate option. He expressed that regarding school transport issues the proposal complies with Modernising Learning Communities Strategy and active travel routes will be considered. 79% of responders agreed with the proposal to relocate Ysgol Uwchradd Caergybi to a new school building for 11–18-year-olds. He noted that 20% of the comments received by stakeholders considered that the proposed site to relocate the school is too far from the middle of the town, that the current building should be updated or rebuilt on the current site. The Director of Education, Skills and Young People said that the relocation of Ysgol Uwchradd Caergybi to a new building will secure education for pupils in the catchment area of Holyhead and to meet future requirements. The maintenance costs for the current building have reached £29m, and the building of a new school will result in savings for the Council when the building is transferred to the authority. He further noted that an impact assessment has been conducted as regarding to equality and the Welsh language.

Councillor Jeff Evans, Chair of the Corporate Scrutiny Committee reported on the discussions held on the item at the Corporate Scrutiny Committee held on 15 October 2025. He noted that having considered the outcomes of the statutory consultation as regards to the relocation of Ysgol Uwchradd Caergybi the committee resolved to recommend to the Executive to accept the recommendations as is outlined in the report.

The Chair referred that over 1,000 responses were received during the consultation process to relocated Ysgol Uwchradd Caergybi. 21% of those responders expressed concerns regarding the location of the proposed site, however, Appendix 1 attached to the report provides clear responses to those concerns and the reasons as to the reasons for the relocation of the school.

Councillor Carwyn Jones considered that there have been sufficient responses to the consultation process regarding the proposal to relocate Ysgol Uwchradd Caergybi to a new site. It was encouraging as to the responses of the Schools' Councils within the catchment area regarding the proposal and have suggested comments for consideration for the future of the school.

It was RESOLVED:-

- **To approve the proposal (following the report on the outcome of the statutory consultation held on the proposal) to “Relocate Ysgol Uwchradd Caergybi learners to a new school building for 11–18-year-olds”.**
- **To authorise Officers to publish a statutory notice in respect of the proposal.**

8 EXCLUSION OF THE PRESS AND PUBLIC

It was RESOLVED to adopt the following :-

“Under Section 100(A)(4) of the Local Government Act 1972, to exclude the press and public from the meeting during the discussion on the following item on the grounds that it involved the disclosure of exempt information as defined in Schedule 12A of the said Act and in the Public Interest Test presented.”

9 STRATEGIC OUTLINE CASE - RELOCATE YSGOL UWCHRADD CAERGYBI LEARNERS TO A NEW SCHOOL BUILDING FOR 11–18-YEAR-OLD LEARNERS

The report of the Director of Education, Skills and Young People incorporating the Strategic Outline Case to relocate Ysgol Uwchradd Caergybi learners to a new school building for 11-18 years old learners was presented to the Executive for consideration.

The Portfolio Member for Education and the Welsh Language presented the report and said that the Strategic Outline Case (SOC) contains a case for a new school building for Ysgol Uwchradd Caergybi to replace the current building by September 2030. Details of the funding proposals to build a new school was outlined to the Committee. As the scheme will be delivered through the Mutual Investment Model (MIM) the proposal would lead to a saving in the central repairs and maintenance budget for the next 25 years.

The Director of Education, Skills and Young People reported that a well-designed school environment together with green outdoor spaces could improve the physical and mental health of young people as at present the current school is dependent on the Millbank playing field for recreational purposes. A new school building will provide additional specialist modern resources. As the potential new school building would have a lower capacity than at present, surplus places at Ysgol Uwchradd Caergybi would be reduced. He further said, that having a purpose-built community resources in the new school building, as well as the co-location of other services, as well as access to modern facilities would be expected to attract increased community use and family engagement and involvement.

Councillor Jeff Evans, Chair of the Corporate Scrutiny Committee reported on the discussions held on the item at the Corporate Scrutiny Committee held on 15 October 2025. He noted that having considered the outcomes of the statutory consultation as regards to the relocation of Ysgol Uwchradd Caergybi the committee resolved to recommend to the Executive to accept the recommendations as is outlined in the report.

The Executive were appreciative of the responses to the consultation process and especially the comments received from the Schools' Councils within the catchment area.

It was RESOLVED to:-

- **approve the Strategic Outline Case (SOC) for the new school building for Ysgol Uwchradd Caergybi;**
- **approve the submission of the SOC to Welsh Government by 8 January 2026 for the Business Case Scrutiny Group meeting a fortnight later;**
- **approve ring fencing capital receipts from the sale of the present Ysgol Uwchradd Caergybi site to repay part of the Council's investment towards the construction of the new school building for Ysgol Uwchradd Caergybi;**
- **delegate authority to the Director of Education, Skills and Young People in consultation with Head of Function (Resources) & S151 Officer and Director of Function (Council Business)/Monitoring Officer to amend the SOC if necessary - if the changes do not result in material changes (in terms of policy, principles, financial contribution, risks and harm to third parties).**

**COUNCILLOR GARY PRITCHARD
CHAIR**

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Isle of Anglesey County Council

Report to:	The Executive
Date:	25 November 2025
Subject:	The Executive's Forward Work Programme
Portfolio Holder(s):	Cllr Gary Pritchard
Head of Service / Director:	Lynn Ball, Director of Function – Council Business / Monitoring Officer
Report Author:	Dyfan Sion, Head of Democratic Services
Local Members:	Not applicable

A – Recommendation/s and reason/s

In accordance with its Constitution, the Council is required to publish a forward work programme and to update it regularly. The Executive's Forward Work Programme is published each month to enable both members of the Council and the public to see what key decisions are likely to be taken over the coming months.

The Executive is requested to:

confirm the attached updated work programme which covers **December 2025 – July 2026**;

identify any matters for specific input and consultation with the Council's Scrutiny Committees;

note that the forward work programme is updated monthly and submitted as a standing monthly item to the Executive.

B – What other options did you consider and why did you reject them and/or opt for this option?

-

C – Why is this a decision for the Executive?

The approval of the Executive is sought before each update is published to strengthen accountability and forward planning arrangements.

Ch – Is this decision consistent with policy approved by the full Council?

Yes.

D – Is this decision within the budget approved by the Council?
Not applicable.

Dd – Assessing the potential impact (if relevant):

1	How does this decision impact on our long term needs as an Island?	
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	
3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.	
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	
6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.	

E	Who did you consult?	What did they say?
1	Chief Executive / Senior Leadership Team (SLT) (mandatory)	The forward work programme is discussed monthly at Leadership Team meetings.
2	Finance / Section 151 (mandatory)	See above.
3	Legal / Monitoring Officer (mandatory)	See above.
4	Human Resources (HR)	
5	Property	
6	Information Communication Technology (ICT)	
7	Procurement	

E	Who did you consult?	What did they say?
8	Scrutiny	Under normal circumstances, monthly joint discussions take place on the work programmes of the Executive and the two Scrutiny Committees in order to ensure alignment.
9	Local Members	Not relevant

F - Appendices:

The Executive's Forward Work Programme: December 2025 – July 2026.

Ff - Background papers (please contact the author of the Report for any further information):

Isle of Anglesey County Council

The Executive's Forward Work Programme

Period: December 2025 – July 2026

This forward work programme lists all the decisions that the Executive intends to take and what business the scrutiny committees will be considering as well as when those matters will be discussed. It also lists any recommendations the Executive intends to make regarding decisions which must be made by the full Council.

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Executive decisions may be taken by the Executive as a collective body or by individual members of the Executive acting under delegated powers.

The forward work programme is reviewed on a regular basis and monthly updates are published. The fact that a decision has not been included in the forward work programme does not prevent urgent or unforeseen matters being considered.

Mae'r ddogfen hon hefyd ar gael yn Gymraeg / This document is also available in Welsh.

Last updated on 17 November 2025

December 2025

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
16.12.25 meeting	The Executive's forward work programme	Cllr Gary Pritchard	
	Treasury Management mid-year review 2025/26	Cllr Robin Williams	Full Council 5.3.26
	Council Tax Premium	Cllr Robin Williams	
	Housing rents and service charges 2026/27	Cllr Carwyn Jones	
	New housing development on Plas Penlan site, Llangefni	Cllr Carwyn Jones	
	Digital Education Strategic Plan	Cllr Dafydd Roberts	Partnership and Regeneration Scrutiny Committee 10.12.25
	Waste Collection and Recycling Consultation	Cllr Ieuan Williams	Partnership and Regeneration Scrutiny Committee 10.12.25

January 2026

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
27.1.26 meeting	The Executive's forward work programme	Cllr Gary Pritchard	
	Draft Revenue Budget 2026/27	Cllr Robin Williams	Resources Scrutiny Panel 8.1.26 Corporate Scrutiny Committee 21.1.26
	Capital Strategy	Cllr Robin Williams	Full Council 5.3.26
	Community based non-residential social care services – fees and charges 2026/27	Cllr Neville Evans	

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
	Local authority residential homes for older people – setting the standard charge for 2026/27	Cllr Neville Evans	
	Independent sector care home fees for 2026/27	Cllr Neville Evans	
	Ysgol Uwchradd Caergybi – objections and final decision report	Cllr Dafydd Roberts	Corporate Scrutiny Committee 21.1.26
	Towards Net Zero Strategic Plan	Cllr Nicola Roberts	Corporate Scrutiny Committee 21.1.26

February 2026

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
24.2.26 meeting	The Executive's forward work programme	Cllr Gary Pritchard	
	Revenue Budget Monitoring – Quarter 3, 2025/26	Cllr Robin Williams	Resources Scrutiny Panel 12.2.26
	Capital Budget Monitoring – Quarter 3, 2025/26	Cllr Robin Williams	Resources Scrutiny Panel 12.2.26
	Housing Revenue Account Budget Monitoring – Quarter 3, 2025/26	Cllr Robin Williams	Resources Scrutiny Panel 12.2.26
	Treasury Management Strategy Statement 2026/27	Cllr Robin Williams	Full Council 5.3.26
	Fees and charges 2026/27	Cllr Robin Williams	

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
	Medium term Financial Strategy and Budget 2026/27	Cllr Robin Williams	Resources Scrutiny Panel 12.2.26 Corporate Scrutiny Committee 18.2.26 Full Council 5.3.26
	Capital Budget 2026/27	Cllr Robin Williams	Resources Scrutiny Panel 12.2.26 Corporate Scrutiny Committee 18.2.26 Full Council 5.3.26
	Alcohol and regulated entertainment policy statement	Cllr Nicola Roberts	Full Council 5.3.26

March 2026

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
Delegated decision – March 2026	Annual Equality Report 2024/25	Cllr Alun Roberts	Partnership and Regeneration Scrutiny Committee 17.3.26
24.3.26 meeting	The Executive's forward work programme	Cllr Gary Pritchard	
	Corporate Scorecard – Quarter 3, 2025/26	Cllr Robin Williams	Corporate Scrutiny Committee 18.3.26
	Housing Revenue Account Business Plan 2026-2056	Cllr Robin Williams	Corporate Scrutiny Committee 18.3.26

April 2026

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
28.4.26 meeting	The Executive's forward work programme	Cllr Gary Pritchard	

May 2026

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
May 2026 meeting	The Executive's forward work programme	Cllr Gary Pritchard	

June 2026

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
Delegated decision – June 2026	Welsh Language Standards Annual Report 2025/26	Cllr Dafydd Roberts	
June 2026 meeting	The Executive's forward work programme	Cllr Gary Pritchard	
	Corporate Scorecard – Quarter 4, 2025/26	Cllr Robin Williams	Corporate Scrutiny Committee
	Revenue Budget Monitoring – Quarter 4, 2025/26	Cllr Robin Williams	Resources Scrutiny Panel
	Capital Budget Monitoring – Quarter 4, 2025/26	Cllr Robin Williams	Resources Scrutiny Panel

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
	Housing Revenue Account Budget Monitoring – Quarter 4, 2025/26	Cllr Robin Williams	Resources Scrutiny Panel

July 2026

Date of meeting or, if the decision is delegated, publication date	The matter to be considered	Portfolio Member	Date to scrutiny and / or full Council (if relevant)
July 2026 meeting	The Executive's forward work programme	Cllr Gary Pritchard	
	Local Development Plan – consultation on the preferred strategy	Cllr Nicola Roberts	

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Isle of Anglesey County Council

Report to:	Executive Governance and Audit Committee Council
Dates:	25/11/2025 04/12/2025 09/12/2025
Subject:	Amendment to the Constitution – Final Approval of the Council's Annual Accounts
Portfolio holder(s):	
Head of service / director:	Lynn Ball, Director of Function (Council Business)/Monitoring Officer
Report author:	Lisa Lord, Interim Legal Services Manager and Deputy Monitoring Officer
Local members:	All

A – Recommendation(s) and reasons

Recommendations

Executive

For the Executive to express a view on the proposed amendment to the Constitution to provide for the final approval of the Council's Annual Accounts by the Governance and Audit Committee, in place of the Council.

Governance and Audit Committee

For the Committee to express a view on the proposed amendment to the Constitution to provide for the final approval of the Council's Annual Accounts by the Governance and Audit Committee, in place of the Council.

Council

For Council to approve the proposed amendment to the Constitution to provide for the final approval of the Council's Annual Accounts by the Governance and Audit Committee, in place of the Council.

Reasons

- The main stages of the approval process for the Council's Annual Accounts are as follows:
 1. Certification of the draft accounts – s151 Officer

2. Public examination of the draft accounts

3. Review of the draft audited accounts - Governance and Audit Committee

4. Report to the Executive to consider the draft audited accounts

5. Review by Governance and Audit Committee of the final accounts

6. Approval of the final accounts by full Council

- Audit Wales' Annual Plan has a clear goal to bring forward the audit timetable for local government. The authorisation date for 2025/26, is 30/09/2026, which is a month earlier than 2024/25.
- This compresses the time available to respond to any matters raised by the Governance and Audit Committee, agree any changes with the External Auditor, and produce an amended, accurate and bilingual version of the final accounts.
- If approval remains with full Council, the 09/2026 meeting will need to be moved or an extraordinary meeting of full Council will be required.
- Delegating authority to the Governance and Audit Committee is a more efficient approval process. There is no disadvantage to any councillor, nor to the public, as the reports will still be available in the usual way (see full approval process above).
- Audit Wales has suggested the proposed amendment to bring our arrangements in line with those now currently operating in principal councils in Wales.
- Against this background, the amendment sought is to paragraph 3.4.8.12.3 – *"The Committee will review and approve, prior to approval by full council, the authority's annual financial statements, including the explanatory foreword, key messages, trends, consistency with financial performance, suitability of and compliance with accounting policies and treatments and major judgmental areas"*.
- Under paragraph 2.15.2.1 of the Constitution "...changes to the Constitution will only be approved by the full Council after consideration of the proposal by the Executive".
- A report will also be taken to the Governance and Audit Committee, on 04/12/2025, in order to seek the view of that committee on the change proposed.

B – What other options did you consider and why did you reject them and/or opt for this opinion?

Approval remaining with full Council. This was rejected as the status quo is having a negative impact on the efficiency of the process while the proposed change does not disadvantage any party.

C – Why is this a decision for the Executive?

This is not an Executive decision, and the decision will be made by full Council. However under paragraph 2.15.2.1 of the Constitution there is a requirement to provide the Executive with an opportunity to comment on any proposed changes to the Constitution.

Ch – Is this decision consistent with policy approved by the full Council?

Changes to the Constitution (not falling within 3.5.3.6.6 and 3.4.12.6.3) require approval of full Council

D – Is this decision within budget approved by the Council?

There are no budgetary impacts

Dd – Assessment of potential impacts (if relevant)

1. How does this decision affect our long-term needs as an island?

The proposed change supports efficient decision making in relation to the Council's statutory accounts.

2. Is this a decision that is anticipated to prevent future costs/dependencies on the Council? If so, how?

Not to any significant extent but will obviate the need for an extraordinary meeting of the Council.

3. Have we collaborated with other organisations to come to this decision? If so, with whom?

Audit Wales

4. Have the citizens of Anglesey played a part in drafting this way forward, including those directly affected by the decision? Explain how.

No

5. Note any potential impact this decision would have on the protected groups under the Equality Act 2010.

No impact

6. If this is a strategic decision, note any potential impacts the decision would have on those experiencing socio-economic disadvantage.

No impact

7. Please note any potential effects that this decision would have on opportunities for people to use Welsh and not treat the language less favourably than English.

No impact

E – Who did you consult with and what were their comments?

1. Chief Executive / Leadership Team (mandatory)	Considered on 14/10/2025 when the recommendation was agreed
2. Finance / 151 Officer	Report commissioned by the S151 Officer
3. Legal / Monitoring Officer (mandatory)	Author of the report and supportive of the recommendation Legal advice has been sought, in the context of this Report, about the conflict between CIPFA Delivering Good Governance in Local Government Addendum and legislation, when it comes to the voting rights of the lay members of the GAC. The Local Government (Wales) Measure 2011(as amended), Regulation 10 of the Accounts and Audit Regulations (Wales) 2014 (as amended) and statutory guidance all make it clear that lay members of the GAC have full voting rights. This is acknowledged by CIPFA and their Guidance will be revised to reflect the correct statutory position.
4. HR	N/A
5. Property	N/A
6. IT	N/A
7. Procurement	N/A
8. Scrutiny	N/A
9. Local members	Consultation with the Governance and Audit Committee on 04/12/2025

F – Appendices

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Ff – Background papers (contact the report author for more information)

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Isle of Anglesey County Council

Report to:	Executive Committee
Date:	25 November 2025
Subject:	Scorecard Monitoring Report - Quarter 2 (2025/26)
Portfolio holder(s):	Councillor Robin W Williams, Deputy Leader, Finance, Corporate Business and Customer Experience
Head of service / director:	Carys Edwards
Report author:	Gwyndaf Parry (GwyndafParry@ynysmon.llyw.cymru)
Local members:	n/a

A – Recommendation(s) and reasons

1.1	This is the second scorecard for the 2025/26 financial year. It portrays the Council's performance against the strategic objectives outlined in the Council Plan.
1.2	The report highlights some of the positive stories with respect to the quarter 2 performance. Some of these highlights include: • 88% of the councils' vacant posts, 288 vacancies in total, have been advertised as needing a Welsh level 3 or above • Close to 300k participants have taken part in Môn Actif activities during the first half of the year • 88% of tenants were satisfied with responsive maintenance repairs up to the end of September, an improvement from the 84% in Q1 • 95% of planning applications have been determined within timeframes, 323 applications in total • 11 low carbon heating systems have been installed at council buildings so far with a further 23 planned
1.3	The Committee is requested to review the scorecard and note the areas which the Leadership Team and relevant Service are exploring and investigating to manage and secure further improvements into the future.
1.4	These are recommended as follows: 1.4.1 Housing – 03) The average number of calendar days to re-let units of accommodation (excluding DTLs); 1.4.2 Housing – 04) Average number of calendar days taken to deliver Medium Disabled Facilities Grant – Adaptations (£1-10k) 1.4.3 Housing – 05) Average number of calendar days taken to deliver Disabled Facilities Grants – Adaptions worth over £10k 1.4.4 Economy – 04) Total number of customers with annual mooring contracts 1.4.5 Economy - 07) Percentage of high-risk businesses subject to planned inspections that were inspected to ensure compliance with Food Hygiene Legislation

- 1.4.6** Climate Change – 02) Percentage of domestic waste reused, recycled or composted
- 1.4.7** Whole Council Health - 12) % of FOI requests responded to within timescale

B – What other options did you consider and why did you reject them and/or opt for this opinion?

n/a

C – Why is this a decision for the Executive?

This matter is delegated to the Executive

Ch – Is this decision consistent with policy approved by the full Council?

Yes

D – Is this decision within budget approved by the Council?

Yes

Dd – Assessment of potential impacts (if relevant)

1. How does this decision affect our long-term needs as an island?

The Corporate Scorecard Report gives a snapshot of the Key Performance Indicator (KPI) performance against the Council Plan's strategic objectives at the end of each quarter.

2. Is this a decision that is anticipated to prevent future costs/dependencies on the Council? If so, how?

Performance of some KPIs could potentially have an impact on future costs however mitigation measures proposed looks to alleviate these pressures.

3. Have we collaborated with other organisations to come to this decision? If so, with whom?

Elements of the work monitored within the Scorecard is undertaken in a collaborative manner with other organisations such as Betsi Cadwaladr University Health Board, Welsh Government, Keep Wales Tidy, Sports Wales, amongst others.

4. Have the citizens of Anglesey played a part in drafting this way forward, including those directly affected by the decision? Explain how.

N/A

5. Note any potential impact this decision would have on the protected groups under the Equality Act 2010.

N/A

6. If this is a strategic decision, note any potential impacts the decision would have on those experiencing socio-economic disadvantage.

N/A

7. Please note any potential effects that this decision would have on opportunities for people to use Welsh and not treat the language less favourably than English.

N/A

E – Who did you consult with and what were their comments?

1. Chief Executive / Leadership Team (mandatory)	This was considered by the Leadership Team and their comments are reflected in the report
2. Finance / 151 Officer	Comments reflected in the report
3. Legal / Monitoring Officer (mandatory)	Comments reflected in the report
4. HR	Comments reflected in the report
5. Property	
6. IT	
7. Procurement	
8. Scrutiny	Was considered by Corporate Scrutiny on the 18/11. The Committee Chairman will feedback in this meeting.
9. Local members	

F – Appendices

Appendix A - Scorecard Report Quarter 2

Ff – Background papers (contact the report author for more information)

- | |
|---|
| <ul style="list-style-type: none"> • Council Plan 2023-2028 • Scorecard Report Q1 25/26 |
|---|

Corporate Scorecard 2025/26

Quarter 2 report

Prepared by – Transformation Service

Publication date: November 2025

Mae'r ddogfen hon ar gael yn y Gymraeg / This document is available in Welsh

1. Introduction

1.1 The Council Plan 2023-28 identifies six strategic objectives and sets out the key actions and commitments for the next five years.



Welsh Language



Social Care and
Wellbeing



Education



Housing



Economy



Climate Change



Council Plan 2023 to 2028

- 1.2 This scorecard monitoring report for 2025/26 is used to monitor the performance of our Key Performance Indicators (KPIs) in delivering the council's day to day activities that underpin the delivery of the Council Plan.
- 1.3 Some KPIs are new (indicated by an [N] in the titles), some currently do not have targets and are there to set a baseline, and many do not have data available until later in the year. Trends are monitored from Q2 during 2025/26 with the aim of setting targets in 2026/27 where appropriate.
- 1.4 It provides the evidence to enable the Council to monitor its performance and to be data informed when identifying any mitigating actions agreed by the Leadership Team to drive and secure performance improvements into the future.
- 1.5 The results within the scorecard are all cumulative and as such a trend column is available from Q2 to inform the performance trends from quarter to quarter.
- 1.6 The RAG status for each section of the scorecard, with the exception of financial management which is done from a professional opinion perspective, can be found below:
- Red - more than 10% below target and/or needing significant intervention
 - Amber - between 5% & 10% below target and/or requiring some intervention
 - Yellow - within 5% of target
 - Green - on or above target

2. Overview

2.1 The majority (87%) of the indicators with targets monitored during the quarter performed well against targets (Green or Yellow RAG).

2.2 Seven indicators are currently Red or Amber against targets. They are:

2.2.1 Housing – 03) The average number of calendar days to re-let units of accommodation (excluding DTLs) – RED - 81 days, Target - 51 days

There has been a thorough review of the processes involved in this indicator. The service has introduced some changes to its processes which have resulted in improvements to the average days. Whilst current performance remains RED, there is a clear month-on-month improvement with the turnaround steadily reducing, indicating positive progress in managing property turnover.

Since implementing the changes in April, the turnover is around 54 days on average. Unfortunately, before the changes were implemented, returned properties averaged around 101 days to be re-let, which has resulted in a Q2 average of 81 days.

The service will continue to implement the new processes, and based on the current performance, this indicator should see an improvement throughout the year.

2.2.2 Housing – 04) Average number of calendar days taken to deliver Medium Disabled Facilities Grant – Adaptations (£1-10k) – is RED - 204 days, Target - 190 days

and

Housing – 05) Average number of calendar days taken to deliver Disabled Facilities Grants – Adaptions worth over £10k – RED – 285 days, Target - 221 days

As explained in the Q1 Scorecard Report, due to a danger of overspending, new approvals were put on hold in November 2024. This had a knock-on effect, when the service started approving again near the end of Q4 24/25. Successful contractors had unfortunately moved onto other projects, which resulted in a delay in starting DFG contracts. Despite having a small increase in the number of contractors available locally, many are not winning DFG tenders.

For context, 14 properties with medium DFGs and 2 properties with large DFGs were completed up to the end of September. The council remain committed to reducing the average number of calendar days to deliver DFGs.

2.2.3 Economy – 04) Total number of customers with annual mooring contracts – is RED – 151, Target – 170

Demand for moorings continues to reduce. Boat ownership has declined and a preference for walk-on facilities in marina facilities continues to increase with a resultant reduction in mooring uptake. The system of leasing out an area of seabed and then the lessee being required to purchase mooring equipment and arrange laying with a third-party contractor also makes moorings in Y Fenai unappealing.

With competition from Conwy, Felinheli, Caernarfon and Pwllheli marinas all offering step on berths with facilities it's difficult to foresee an improvement. Only a system where council owned and laid moorings akin to the systems used by others would see an increased uptake, although the initial outlay would be considerable and currently unachievable within budget. The annual target will very likely not be achieved.

2.2.4 Economy - 07) Percentage of high-risk businesses subject to planned inspections that were inspected to ensure compliance with Food Hygiene Legislation – RED – 64%, Target – 90%

74 of the 116 inspections due were carried out up to the end of Q2. This is down compared to the 85% achieved in Q1 and the 83% achieved at the end of Q2 in 2024/25.

To conform with the new special procedures licensing scheme, which focuses on improve hygiene and safety standards at tattooists, body pierces, acupuncturists and those undertaking electrolysis, all in scope practitioners and premises had to be inspected and licensed by the end of August. Inspections and assessments were often complex and required two officers, therefore the number of food inspections that could be completed was reduced as officers have dual food and health and safety role.

All the food premises that posed the highest risk received an inspection and all high-risk food premises due for inspection will receive an inspection by the end of the financial year.

2.2.5 Climate Change – 02) Percentage of domestic waste reused, recycled or composted – is RED – 66.36%, Target - 70%

The Q2 performance for this indicator was 66.36% against a target of 70%, representing a decline from the 67.5% in Q2 2024/25 and 67.8% in Q2 2023/24.

The drier weather over the summer resulted in 371 tonnes less green waste being collected compared to Q2 2024/25, which has negatively affected the overall recycling and composting rate. The Kerbside Intervention team have removed over 700 black bins from properties which either had more than one bin or that were not eligible for domestic waste collection (as the properties were either businesses or holiday homes). The team have also changed around 750 large black bins (360L) to standard size bins (240L).

To address performance, the council continues to focus on reducing general waste and increasing recycling through community engagement and resident education. This is a long-term strategy requiring sustained behaviour change, so improvements will be gradual rather than immediate.

The council has established a programme board to discuss what further mitigations can be put in place. Any significant changes identified by the board will be discussed by the Executive and Scrutiny Committees before any changes are made.

2.2.6 Whole Council Health - 12) % of FOI requests responded to within timescale – RED – 76%, Target – 90%

There were 467 requests received up to the end of Q2 and 111 of the requests were late. The Council remain committed to increasing the response rate for FOIs.

The Council's current Data Protection Officer (DPO) has reviewed the council's information requests policy and procedures. Following this a new specification will be developed for the establishment of information requests on the CRM system that will ensure our procedures are compliant with the Information Commissioner's Office (ICO). It is believed that the new online system should make improvements to performance in the long term. Some reduction in capacity within services to deal with information requests tasks also ensures that the target of 90% remains a difficult one.

2.3 Some examples of the good performance seen during the quarter include:

- 2.3.1 88% of the councils' vacant posts, 288 vacancies in total, have been advertised as needing a Welsh level 3 or above
- 2.3.2 Close to 300k participants have taken part in Môn Actif activities during the first half of the year
- 2.3.3 88% of tenants were satisfied with responsive maintenance repairs up to the end of September, an improvement from the 84% in Q1
- 2.3.4 95% of planning applications have been determined within timeframes, 323 applications in total
- 2.3.5 11 low carbon heating systems have been installed at council buildings so far with a further 23 planned



3. Welsh Language

	Q1	Q2	Q2 Target	Q2 RAG	Qtr Trend	Q2 2024/25	Q2 Comments
01) The percentage of jobs advertised by the Council as Welsh level 3 and above [N]	85%	88%	82%	G	↑	77%	288 vacancies at level 3 and above
02) The number of officers receiving Welsh language training	50	64	62	G	↓	62	
03) The number of complaints suggesting a failure to comply with the Welsh Language Standards	0	0	4	G	→	4	
04) The number of complaints that were subject to a statutory investigation by the Welsh Language Commissioner	1	1			→	0	One investigation ongoing based on a complaint made in 24/25
05) The percentage of visits to Welsh language interface of our main website	9%	7%	9%	Y	↓	7%	Fewer visits compared to Q1, but similar to Q2 24/25
06) The percentage of Welsh language responses to official consultations	-	6%	8%	Y	-	10%	
07) The percentage of followers following the Welsh side of the Council's main social media accounts	23%	23%	23%	G	→	23%	
08) The percentage of year 11 pupils studying Welsh [first language]							Data available in Q3
09) Welsh Language Unit - % of children that meet their targeted expectations (immersion) [N]							Data available in Q3
10) The number of businesses receiving Welsh Language support [N]							Data available in Q3

4. Social Care and Wellbeing



	Q1	Q2	Q2 Target	Q2 RAG	Qtr Trend	Q2 2024/25	Q2 Comments
01) Number of adults in receipt of Direct Payments	256	247	224	G	↓	226	
02) The percentage of adult protection enquiries completed within statutory timescales	96.34%	94.15%	90%	G	↓	89.80%	
03) The percentage of adults who have received advice and assistance from the information, advice and assistance service and have not contacted the service in the following 6 months	88.07%	87.64%	85%	G	↓	92.96%	
04) Number of older people (aged 65 or over) whom the authority supports in care homes	295	323	335	G	↓	320	
05) The percentage of carers of adults who received an assessment or review in their own right during the year following a request	98.20%	98.60%	93%	G	↑	95.20%	
06) The average length of time for all children who remain on the Child Protection Register as at end of quarter	163	170	270	G	↓	128	
07) Children Re-Registered on the Child Protection Register within 12 Months of previous removal from the register	3.57%	1.56%	15%	G	↑	0	
08) The percentage of referrals of children that are re-referrals within 12 months	7.69%	15.68%	15%	Y	↓	10.09%	29 of the 185 referrals were re-referrals
09) The percentage of statutory visits to children on the Child Protection Register due in the year that took place in accordance to regulations	90.61%	90.39%	90%	G	↓	92.13%	
10) The percentage of Initial Pathway Plans due in the year that took place within timescales	100%	100%	85%	G	→	100%	
11) Number of visits to Leisure Centres	129,096	260,023	265,188	Y	↓	252,090	
12) Number of people participated in Mon Actif activities [N]	146,746	296,458	287,188	G	↑		
13) Percentage of parents who feel they can identify a positive change following completion of the Positive Parenting Programme (PPP) [N]							Data available in Q4

5. Education



	Q1	Q2	Q2 Target	Q2 RAG	Qtr Trend	Q2 2024/25	Q2 Comments
01) Percentage of pupil attendance in primary schools (termly)	93.2%	93.2%	95%	Y	→	93.1%	Similar performance to Q2 24/25
02) Percentage of pupil attendance in secondary schools (termly)	88.2%	89.7%	90%	Y	↑	89.2%	Slight improvement compared to Q2 24/25
03) Percentage of Year 11 leavers not in Education, Training or Employment [NEET]							Data available in Q4
04) Number of schools in Estyn Follow up / Statutory Category	1	1			→	0	
05) Number of children and young people excluded permanently from school	23	2				4	
06) Number / proportion of schools with a financial recovery plan	6	6	6	G	→	6	
07) The percentage of adults who think that overall, the library service they use is 'very good' or 'good' [N]							Data available in Q4
08) The average overall rating out of ten awarded by users aged 16 or under for the library service they use [N]							Data available in Q4
09) Average percentage of children's Individual Development Plans (IDP) targets that are achieved by the target date [N]							Data available in Q3
10) Number of children that have progressed up, or completed, the Nofio Mon Programme as part of Mon Actif activities [N]	924	1610	1270	G	↑		



6. Housing

	Q1	Q2	Q2 Target	Q2 RAG	Qtr Trend	Q2 2024/25	Q2 Comments
01) Landlord Services: Average number of days to complete Responsive Maintenance repairs	15	14	18	G	↑	18	
02) Percentage of tenants satisfied with Responsive Maintenance repairs	84%	88%	85%	G	↑	88%	
03) The average number of calendar days to re-let units of accommodation (excluding DTLs) [N]	89	80	51	R	↑		Since the new process was established in April, it takes 54 days on average to re-let units. Historical process before April is the main reason for not achieving the target.
04) Average number of calendar days taken to deliver Medium Disabled Facilities Grant – Adaptations (£1k-10k)	205	204	190	A	↑	184	14 Medium DFG contracts completed
05) Average number of calendar days taken to deliver Large Disabled Facilities Grant – Adaptations (>£10k)	285	285	221	R	→	222	2 Large DFG contracts in Q1 and no further large contracts in Q2
06) Number of new Council homes developed, and former Council Homes purchased and brought back into Council rented homes.	4	13	13	G	↑	36	
07) The total amount of rent arrears owed by current tenants as a percentage of the total rent collectable for the permanent accommodation	3.19%	3.35%	3.10%	Y	↓	3.55%	
08) Number of empty private properties brought back into use through our Empty Homes interventions	15	32	25	G	↑	34	
09) Percentage of households successfully prevented from becoming homeless	80%	90%	85%	G	↑	90.0%	
10) Number of homelessness applications for assistance (section 62 assessments)	117	292			↓	294	
11) Number of Households currently placed in Emergency and Temporary Accommodation	79	84			↓	101	

7. Economy



	Q1	Q2	Q2 Target	Q2 RAG	Qtr Trend	Q2 2024/25	Q2 Comments
01) % of economic and development / regeneration grant funding received and implemented	70%	112%				41%	Spend ahead of schedule
02) Expenditure (capital and revenue) on large infrastructure, economic development and regeneration projects (£) [N]	£1.653m	£2.758m					
03) Percentage of council business units and commercial space let [N]	95%	98%	90%	G	↑		
04) Total number of customers with annual mooring contract	100	151	170	R	↓	190	51 contracts in Q2 against a target of 65. The annual target is very unlikely to be achieved
05) Percentage of all planning applications determined in time	94%	95%	90%	G	↑	97%	323 planning applications determined in time
06) Percentage of planning enforcement cases investigated within 84 days	87%	79%	80%	Y	↓	92%	
07) Percentage of high-risk businesses subject to planned inspections that were inspected to ensure compliance with Food Hygiene Legislation	85%	64%	90%	R	↓	83%	74 of the 116 inspections carried out. The highest risk businesses have all been inspected. Plans in place to catch up in the second half of the year.
08) Percentage of food establishments that meet food hygiene standards	99%	99%	95%	G	→	98%	
09) Number of people supported to become prepared for work, through SPF interventions [N]	162	320			↑		

8. Climate Change



	Q1	Q2	Q2 Target	Q2 RAG	Qtr Trend	Q2 2024/25	Q2 Comments
01) Total carbon emissions from council buildings (tCO2e)							Data available in Q4
02) Percentage of domestic waste reused, recycled, or composted	66.41%	66.36%	70%	R	↓	67.5%	No further improvement from Q1 partly due to a reduction in Green Waste because of the warmer weather
03) Percentage of waste reused, recycled, or composted from Council buildings	46%	44.4%			↓	48%	Rate has decreased compared to Q2 2024/25
04) Percentage of streets that are clean	100%	100%	96%	G	→	98%	
05) Average number of working days taken to clear fly-tipping incidents	0.01	0.03	1	G	↓	0.04	
06) Percentage of A roads in poor condition (annual)							Data available in Q3
07) Percentage of B roads in poor condition (annual)							Data available in Q3
08) Percentage of C roads in poor condition (annual)							Data available in Q3
09) Total carbon emissions from council fleet (tCO2e inc WTT)	156.5	311.02	320	G	↑	320	
10) Number of schools participating in accredited climate change programmes [N]							Data available in Q3
11) Number of low carbon heating systems installed in Council buildings [N]		11					11 installations completed with a further 23 planned
12) Use of public EV charging points operated by the Council (kwh) [N]	76,786	149,427			↓		This is the equivalent of driving from Holyhead to Cardiff and back over 1,100 times

9. Whole Council Health

	RAG	Trend	Budget	Actual	Variance (%)	Forecasted Actual	Forecasted Variance (%)
01) Forecasted end of year outturn (Revenue)	G	→	£192,983,000			£192,331,000	-0.34%
02) Forecasted end of year outturn (Capital)		↑	£35,148,000			£33,111,000	-5.80%
03) Income v Targets (excluding grants)	G	↓	-£8,204,707	£ 9,847,700	20.03%		
04) Forecasted general balances at end of year		↑				-£17,416,300	
05) Cost of borrowing - % of budgeted revenue expenditure		→	2.35%			2.35%	
06) No of Services forecast to overspend by over 5% of their budget		→				2	
07) % of Council Tax collected (for last 3 years)	Y	↑		97.1%			
08) % of Sundry Debtors collected (for last 3 years)	Y	↑		91.4%			

	Q1	Q2	Q2 Target	Q2 RAG	Qtr Trend	Q2 Comments
09) Total number of stage 2 complaints upheld / partially upheld	1	3	6	G	↓	3 Corporate complaints
10) Total % of written responses to stage 2 complaints within 20 days (Corporate)	100%	87%	80%	G	↓	
11) Total % of written responses to complaints within 15 days (Social Services)	80%	80%	80%	G	→	Two stage 1 complaints were late but an extension was agreed the complainants
12) % of FOI requests responded to within timescale	74%	76%	90%	R	↑	111 of the 467 FOI requests were late
13) Proportion of queries dealt with and closed by Cyswllt Môn (not forwarded to Services)	32%	35%			↑	
14) Number of staff authority wide staff, including teachers and school-based staff (FTE)	2376	2380			↑	
15) Sickness absence - average working days/shifts lost	1.93	3.93	4.08	G	↓	
16) Short Term sickness - average working days/shifts lost per FTE	0.92	1.73			↑	
17) Long Term sickness - average working days/shifts lost per FTE	1.01	2.2			↓	
18) Local Authority employees leaving (%) (Turnover)						
19) % of posts advertised and filled during first round of advertising	78%	73%	70%	G	↓	96 posts filled during first round of advertising

11. Conclusion and Recommendations

- 11.1 The performance of 87% of the performance indicators performing above target or within 5% tolerance of their targets for the quarter is positive.
- 11.2 It demonstrates that services are operating in line with the values and general principles of the Council.
- 11.3 **Recommendation – that the Leadership Team manage, investigate and secure improvements into the future for the following KPIs:**
 - 11.3.1 Housing – 03) The average number of calendar days to re-let units of accommodation (excluding DTLs);
 - 11.3.2 Housing – 04) Average number of calendar days taken to deliver Medium Disabled Facilities Grant – Adaptations (£1-10k)
 - 11.3.3 Housing – 05) Average number of calendar days taken to deliver Disabled Facilities Grants – Adaptions worth over £10k
 - 11.3.4 Economy – 04) Total number of customers with annual mooring contracts
 - 11.3.5 Economy - 07) Percentage of high-risk businesses subject to planned inspections that were inspected to ensure compliance with Food Hygiene Legislation
 - 11.3.6 Climate Change – 02) Percentage of domestic waste reused, recycled or composted
 - 11.3.7 Whole Council Health - 12) % of FOI requests responded to within timescale

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Isle of Anglesey County Council

Report to:	Executive Committee
Date:	25/11/2025
Subject:	Self-Assessment & Performance (Wellbeing) Report 2024/25
Portfolio holder(s):	Cllr Robin W Williams
Head of service / director:	Carys Edwards, Head of Profession HR & Transformation
Report author:	Gwyndaf Parry (Gwyndafparry@ynysmon.llyw.cymru)
Local members:	N/A

A – Recommendation(s) and reasons

1. It is recommended that the Executive adopts the Self-Assessment & Performance (Wellbeing) Report 2024/25

As part of the Local Government and Elections (Wales) Act 2021 the following duty is recognised on Anglesey County Council:

... to keep its performance under review

1) must keep under review the extent to which -

- (a) it is exercising its functions effectively,
- (b) it is using its resources economically, efficiently and effectively, and
- (c) its governance is effective for securing the matters set out in paragraphs (a) and (b)

and, in connection with all financial years,

make a report setting out its conclusions as to the extent to which it met the performance requirements (a, b and c above) during that financial year.

To meet the expectation above, the County Council's draft Self-Assessment (SA) for 2024/25 was prepared. The report evidences the output of the Councils corporate planning and performance management framework and is the end of a process that merges several different aspects together.

In addition, the report reflects the Council's performance against our wellbeing objectives in line with the requirements of the Well-being of Future Generations (Wales) Act 2015, and monitors progress against the six strategic objectives of the Council Plan 2023–2028.

B – What other options did you consider and why did you reject them and/or opt for this opinion?

Other options were not considered as this expectation is one of the core requirements of the relevant legislations - the Local Government and Elections (Wales) Act 2021 and the Wellbeing of Future Generations (Wales) Act 2015

C – Why is this a decision for the Executive?

It is a process which is in accordance with the Local Government and Elections (Wales) Act 2021

Ch – Is this decision consistent with policy approved by the full Council?

It is a process which is in accordance with the Local Government and Elections (Wales) Act 2021

D – Is this decision within budget approved by the Council?

It is anticipated that the associated work program (depicted at tail-end of the SA and inclusive of those areas rolled over into 2025/26) and its realisation is placed under the leadership and ownership of the Leadership Team (LT) within time in accordance with the County Council's financial year 2025/26.

Dd – Assessment of potential impacts (if relevant)

1. How does this decision affect our long-term needs as an island?

It affects our long-term needs by recognising related areas that require further attention as a council.

2. Is this a decision that is anticipated to prevent future costs/dependencies on the Council? If so, how?

Partly — yes, in relation to the expected improvements needed in the performance of certain areas, and so on.

3. Have we collaborated with other organisations to come to this decision? If so, with whom?

A specific section of the self-assessment recognises all the collaborative work that is taking place across a range of Services

4. Have the citizens of Anglesey played a part in drafting this way forward, including those directly affected by the decision? Explain how.

Residents of Anglesey, through the corporate scrutiny committees, are given a quarterly opportunity to express their views and challenge the council on its performance. The content also sets out how the different services involve residents in their decision-making.

5. Note any potential impact this decision would have on the protected groups under the Equality Act 2010.

The work programme is not expected to have an impact on the groups protected under the Equality Act 2010

6. If this is a strategic decision, note any potential impacts the decision would have on those experiencing socio-economic disadvantage.

N/A

7. Please note any potential effects that this decision would have on opportunities for people to use Welsh and not treat the language less favourably than English.

N/A

E – Who did you consult with and what were their comments?

1. Chief Executive / Leadership Team (mandatory)	This was considered by the Chief Executive / Leadership Team (LT) and their comments are reflected in the report
2. Finance / 151 Officer	The comments of the Section 151 Officer as a member of the LT have also been included
3. Legal / Monitoring Officer (mandatory)	Monitoring Officer's comments as a member of the LT have been included
4. HR	Comments are reflected in the report
5. Property	
6. IT	
7. Procurement	
8. Scrutiny	Was considered by Corporate Scrutiny on the 18/11. The Committee Chairman will feedback in this meeting
9. Local members	
10. Governance & Audit Committee	The Self-Assessment section was discussed at the Governance and Audit Committee in September. The Committee felt that the table on page 17, which shows performance results by Service, appeared to reflect very strong performance — and questioned whether it was a fair representation. The table reflects Services' performance against the commitments they made at the start of the year, rather than the impact of their performance on communities.

	We are in the process of establishing an internal Governance Group that will review the self-assessment process and template. One of the areas to be reviewed will be the scoring categories and their definitions, in order to ensure that they provide a fair and consistent reflection of Service and Council performance.
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F – Appendices

Self-Assessment & Performance (Wellbeing) Report 2024/25
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Ff – Background papers (contact the report author for more information)

• Government and Elections (Wales) Act 2021 • Self-Assessment Report 2023/24 • Governance & Audit Committee – 16/7/2025



Self-Assessment and Performance (Wellbeing) Report 2024/25

Prepared by – Transformation Service

Publication date – November 2025

Mae'r ddogfen hon ar gael yn y Gymraeg / This document is available in Welsh

Introduction

This report is the first time that Isle of Anglesey County Council has combined its Self-Assessment, Performance (Wellbeing) Report for the 2024/25 year. It shows the result of our combined approach to planning, managing performance, and encouraging wellbeing of future generations. It provides evidence of how we have:

- Delivered on our strategic objectives and key priorities,
- Used our resources economically, efficiently and effectively, and
- Managed and reduced risks.

The council's work is guided by its vision “**to create an Anglesey that is healthy and prosperous where people can thrive**”. The Council Plan sets out our strategic objectives, linking our priorities to the Wellbeing of Future Generations (Wales) Act 2021, ensuring that our decisions and services are sustainable and focused on improving outcomes for current and future generations.

This report provides a reflection of the Council's outputs and performance over the year, focusing on how we have delivered against what we planned to do. It does not necessarily reflect the full impact of our work on the outcomes for the community, which can be influenced by wider factors beyond the Council's direct control.

It demonstrates the council's commitment to the Local Government and Elections (Wales) Act 2021, which requires councils to regularly review how well they are meeting performance requirements. These include effectively carrying out functions, ensuring resource efficiency, and maintaining good governance. Our goal is to build on our strengths and continue improving innovation, transparency, and services in line with the national performance and governance framework.

It also highlights the work undertaken in partnership with our resilient community to achieve key outcomes. The report gives a clear overview of the progress made against the 2024/25 commitments identified in the Annual Delivery Document 2024/25, the progress made against the Council Plan Strategic Objective commitments by 2028, as well as our commitments under the Wellbeing of Future Generations (Wales) Act. This report evaluates our progress and serves as a foundation for our future ambitions.



The Council's Wellbeing Objectives

The Council's strategic objectives and the council plan have been produced to support the Council's duty to meet the wellbeing objectives for the benefit of current and future generations. The Council's Wellbeing Objectives are:

1. The people of Anglesey are educated to reach and fulfil their long-term potential
2. The people of Anglesey are safe, healthy and as independent as possible
3. The people of Anglesey and its communities enjoy, protect and enhance their built and natural environment for future generations

The table below shows how the wellbeing objectives align with the Welsh Government's national wellbeing objectives and the Council's strategic objectives:

The Council's Wellbeing Objectives	Council Plan Strategic Objectives	Prosperous	Resilient	Healthier	More Equal	Cohesive Communities	Vibrant Culture & Thriving Welsh Language	Globally Responsive
Wellbeing Objective 1 - The people of Anglesey are educated to reach and fulfil their long-term potential	Welsh Language, Social Care and Wellbeing, Education, Housing and Economy	✓	✓	✓	✓	✓	✓	✓
Wellbeing Objective 2 - The people of Anglesey are safe, healthy and as independent as possible	Social Care and Wellbeing, Education and Housing		✓	✓	✓	✓	✓	
Wellbeing Objective 3 - The people of Anglesey and its communities enjoy, protect and enhance their built and natural environment for future generations	Welsh Language, Economy, Climate Change	✓	✓	✓	✓	✓	✓	✓

Council Plan 2023-2028 – Strategic Objectives

The Council Plan is the key document serving as a focal point for decision-making at all levels; providing a framework to plan and drive forward priorities; shape annual spending; monitor performance and progress.

At its core is our desire to work with Anglesey residents, communities and partners to ensure the best possible services, improve the quality of life for all and create opportunities for future generations.

Its six main objectives reflect the key areas the Council should be focusing its efforts on.

The Council Plan's vision is to:

'Create an Anglesey that is healthy and prosperous where people can thrive.'



The Welsh Language

Increase the opportunities to learn and use the language.



Social Care and Wellbeing

Providing the right support at the right time.



Education

Ensuring an effective provision for today and for future generations.



Housing

Ensuring that everyone has the right to call somewhere home.



Economy

Promoting opportunities to develop the Island's economy.



Climate Change

Responding to the crisis, tackling change and working towards becoming net zero organisation by 2030.

Our method of Self-Assessment

As part of the Local Government and Elections (Wales) Act 2021 monitoring the performance of all local authorities based on a self-assessment was set out.

The council undertake a comprehensive review of the self-assessment process on an annual basis including identifying lessons learnt during the previous year as well as utilising feedback from the Corporate Scrutiny Committee, Leadership Team and elected members.

During 2024 we reviewed our approach to self-assessment and made a few adjustments to further streamline and strengthen the process. We worked collaboratively with Services across the council to adjust the template to focus on four key areas, which are in line with applying the Wellbeing of Future Generations Act. These four areas are:



Service Planning and Performance



Workforce Planning



Financial Planning



Governance; Procurement & Contract Management and
Risk & Audit Management

We also allowed more time for Services to start the evidence gathering stage. We also moved the service challenge meetings, known as Service Reviews, from January to between March and May to ensure that a whole financial year's data was available to be used. We believe this strengthened the process based on our experiences from previous years. We will continue to review our self-assessment processes every year and implement changes that were not implemented during 2024/25.

Self-evaluation is an integral part of any organisation's improvement process, and its primary purpose is for self-assurance; however, it is recognised within the Isle of Anglesey County Council that if self-evaluation is done well, it can also provide assurances to external audiences, including partners, regulators and indeed residents.

Each of the nine Services was asked to complete a self-evaluation - scoring their performance on identified areas deemed important as to measure the general performance of services. They were asked to evaluate their performance against an updated criteria listed below and were thereafter challenged as to their findings by a group of officers and elected members in the Service Reviews:

Performance Rating	Description
Outstanding	Performance that consistently delivers excellent results and demonstrates exceptional contribution towards achieving Council strategic objectives.
Exceeds Expectations	Effective Service who are already doing well, delivering superior results beyond what was expected.
Meets Expectations	Performance that meets established standards and fulfils statutory and non -statutory obligations and knows the areas needed to improve.
Needs Improvement	Performance that falls below expected standards and requires corrective action by the Service.

Individual Services were asked to identify areas for improvement that they needed to focus on to improve performance into the future. These areas for improvement have been included in this self-assessment, however some have been included in a wider area for improvement for the Council and will be managed by a lead service which are identified in the 'Identified Areas for Improvement' section of this report.

Individual service areas for improvement are monitored as part of the Service Review process.

This self-assessment summarises the conclusion of the work for 2024/25 and evaluates the overall performance of the Council, answering at the simplest level, the following questions –

- How well are we doing?
- How do we know?
- What and how can we do better?

The Self-assessment forms an essential part of our performance management arrangements as can be seen in the diagram below –



For more details on how we monitor and assess performance, please visit www.anglesey.gov.wales/en/Council/Performance/Council-Plan/Performance-management.

Service Planning and Performance Management

Exceeds Expectations



How well are we doing?

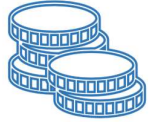
Service planning is an essential tool for performance management. It sets out what services will deliver, provides a clear roadmap for achieving the objectives of the Council Plan, and ensures accountability for outcomes. Performance management then brings this into practice by enabling the council and its staff to plan, monitor and review priorities through strategic, service and individual objectives, ensuring that resources are used effectively to drive continuous improvement.

The evidence supports an overall conclusion that the council have a strong grasp on Service Planning and have a clear vision for the future and how to achieve that vision. The council has a strong appetite for continuous improvement and is transparent when reviewing its key performance indicators, annual activities and monitoring arrangements.

How do we know?

Identified Strengths	Examples of Supporting Evidence
Clear Objectives and Key Performance Indicators – The council has a clear vision in place with measurable objectives for service delivery which is aligned to the community needs and legislative requirements. The council has clearly defined and measurable whole council KPIs that align with its strategic priorities and service delivery goals.	• Council Plan • Annual Delivery Document • Council Values • Strategic plans • Modernising Learning Communities and Developing the Welsh Language Strategy • Local Code of Governance – pages 12-16, 20-22 • Corporate Scorecard
Data Collection, Analysis and Benchmarking – The council is committed to becoming a data informed council, making evidence-based decisions by the regular monitoring of data, analysing data and identifying trends from the data to make informed decisions. The council compares performance with other councils whenever possible to ensure that the performance is in line with expectations and identify areas for improvement.	• Quarterly Scorecard Monitoring • Service Performance Indicators • PowerBI Dashboards; net zero, tackling poverty, customer experience. • Stats Wales • Data Cymru • Data Cymru - Benchmarking Clubs (data is not available to the public) • Local Code of Governance - page 9

	• Council Committee Decisions • Council Committee Minutes
Regular Monitoring and Reporting – The council ensures accountability and transparency in performance management by regular monitoring of performance against established KPIs and the quarterly reporting of performance through our annual delivery document to elected members and senior leadership, officers, and the public	• Annual Performance Report • Annual Governance Statement • Annual Directors Report on the effectiveness of Social Services • Anglesey and Gwynedd Public Services Board Annual Report • Quarterly Scorecard Monitoring • Survey of tenants and residents (STAR) survey results
Stakeholder Engagement – The council is in continuous engagement with Anglesey residents, businesses, partners and staff, to gather feedback on service delivery and performance, ensuring services meet the needs of the community	• Public Consultations • Survey of tenants and residents (STAR) survey results • Local Code of Governance - page 9 • National Resident Survey • Staff Survey
Innovation and Adaptability – The council has a good track record of innovation and adapts well to changing circumstances	• Solar car port in council carparks • Net Zero Ysgol y Graig 'Graig Fach' Unit • Freeport • Holyhead Regeneration Programme - Holyhead seafront kiosks • Dementia Friendly Communities Scheme • Môn Actif Swim Safe • Anglesey home dialysis scheme
Compliance with Legal and Regulatory Standards – The council complies with relevant legislation, regulations and statutory duties and ensures accountability and transparency in its decision-making processes	• External Audit: Annual Audit Summary • Isle of Anglesey County Council Constitution • Local Code of Governance - page 7
Continuous Improvement Culture – The council has a culture of continuous improvement in performance management practices, through regular reviews and evaluations which enables the council to adapt to changing circumstances, identify emerging trends and drive ongoing improvement in service delivery	• Quarterly Scorecard Monitoring • Local Code of Governance - pages 14-16, 20-22



Exceeds Expectations

Financial Planning

How well are we doing?

Financial planning involves the strategic management of finances. It encompasses assessing the current financial situation, delivering objectives, and creating comprehensive plans to allocate resources whilst maintaining fiscal stability. This process includes short (up to 1 year), medium (1-3 years) and long term (3+ years) financial forecasting to ensure the council can meet its obligations and deliver services to the community.

The council have a strong grasp on Financial Planning and have a clear financial plan in place to achieve the council's vision.

How do we know?

Identified Strengths	Examples of Supporting Evidence
Budget Management – The council has a strong budget management process in place that aligns with the strategic objectives and service priorities, whilst minimising the risk of overspending or underfunding.	• Medium Term Financial Strategy and Budget • Local Code of Governance – pages 20-22
Financial Stability – The council has healthy reserves and low debt levels relative to its income and demonstrates prudent financial management practices that ensure long-term sustainability.	• Medium Term Financial Strategy and Budget • Statement of Accounts • Local Code of Governance – pages 20-22
Effective Resource Allocation – The council has an effective allocation of its financial resources to meet service demand and delivery requirements, whilst maximising its value for money. The council has good arrangements to respond to financial challenges in the short to medium term.	• Budget Book • Local Code of Governance – pages 14-16 • Medium Term Financial Strategy and Budget
Transparency and Accountability – The council has strong publicly available financial management reporting, including quarterly budget monitoring reports and annual statement of accounts.	• Statement of Accounts • Local Code of Governance – pages 23-24 • Budget Setting Process
Compliance with Financial Regulations – The council fully complies with relevant financial regulations, accounting standards and legal requirements including core funding and grant funding.	• Annual Governance Statement • Local Code of Governance – page 7
Monitoring – The council has regular monitoring and oversight of financial performance, including quarterly budget reporting of the revenue, capital and HRA accounts, whilst ensuring that the risks are managed appropriately.	• Quarterly Financial Monitoring Reports to the Executive

Audit Assessments – The council have positive inspection reports from its auditors including Audit Wales and Internal Audit which provide independent validation of the financial management practices

- [Annual Report of the Governance and Audit Committee](#)
- [Internal Audit Annual Report](#)
- [External Audit: Annual Audit Summary](#)

Workforce Planning

Exceeds Expectations



How well are we doing?

Workforce planning is a process where the council can analyse its current and future workforce needs against its commitments, plans and objectives. It enables the council to plan how it will recruit, support, develop and retain the employees it needs for the future, reflecting the long-term planning principle of the Wellbeing of Future Generations Act.

The council has a strong understanding of workforce planning and have the requirements in place for achieving its commitments, plans and objectives from a human resource perspective. The council is aware of the posts that are more challenging to recruit and have plans in place to maximise recruitment opportunities.

How do we know?

Identified Strengths	Examples of Supporting Evidence
Training and Development – The council provides many opportunities to undertake training, professional development and skill enhancement which enables employees to continually grow and adapt to changing job requirements and technological advancements	• Welsh language annual report • Local Code of Governance – pages 17-19 • Member Development and Training Programme • Academi Môn • Short courses for Staff
Workforce Planning – The council is committed to getting the right people, with the right skills, in the right place, at the right time whilst ensuring alignment with the councils' strategic objectives and service priorities. The council continuously develops and implements succession plans to identify and develop future leaders and key personnel ensuring continuity and sustainability	• Workforce Planning Strategy • Strategic People Plan 2025 • Local Code of Governance – pages 17-19
Work Benefits – The council offers many benefits to staff including flexible working, hybrid working, wellbeing support and occupational health, work pension as well as many other policies designed to improve the work-life balance of its staff	• Flexible working (Hybrid / Flexible working options / flexible retirement) • Cycle to work scheme • Manteision Môn
Performance Review – The council have a clear system for measuring employee performance, alignment with council strategies and strategic objectives, and career development through its annual development conversations with staff, annual workforce review and effective talent management	• Appraisal system • Corporate Safeguarding Annual Report • Local Code of Governance – pages 17-19

Employee Engagement and Satisfaction – The council have many forms for employee engagement including staff surveys and other feedback mechanisms which ensures an effective communication and positive work environment for staff to thrive and high morale

- Staff Attendance
- Staff Retention
- Staff Survey
- Members Briefing Sessions
- Fforwm Môn
- Y Ddolen
- Chief Executive Update
- [Local Code of Governance – pages 17-19](#)

Governance; Risk, Audit, Procurement & Contract Management

Exceeds Expectations



How well are we doing?

Risk Management deals with identifying and managing uncertainties that could impact on the councils' objectives in a positive or negative way. Internal Audit involves providing independent, objective assurance and consulting activities to add value and improve the council's operations. It helps the council to accomplish its objectives by bringing a systematic, disciplined approach to evaluate and improve the effectiveness of risk management, control and governance processes. External audit and regulators scrutinise management and governance processes, ensure service quality and compliance with legal and regulatory standards. Together, they maintain council accountability and service effectiveness and provide assurance that public funds are used responsibly. Procurement management focuses on the initial acquisition of goods or services, while contract management concentrates on the ongoing management and compliance of those agreements once they are in place. Both processes are critical to acquire and manage the resources that the council needs to operate and achieve key objectives efficiently and effectively.

The council regularly monitor and review the strategic risks and mitigating actions put in place to monitor them and it has an excellent relationship with regulators and auditors. The council have a good understanding of procurement rules and procedures, and contract management arrangements are working well. Overall processes and procedures are strong and the culture of the organisation ensures that they are essential practices in day-to-day activities.

How do we know?

Identified Strengths	Examples of Supporting Evidence
Risk Identification – The council have robust processes in place to identify and assess risks across all areas of operations, including financial, operational, strategic, and compliance risks.	• Risk Management Policy and Strategy • Risk management framework • Strategic Risk Register • Service Risk Register • Project Risk Register • Local Code of Governance - pages 12-24
Risk Mitigation – The council demonstrates proactive risk management practices aimed at minimizing the likelihood and impact of adverse events by developing and implementing effective risk mitigation strategies and controls to address them.	• Risk Management Policy and Strategy • Risk management framework • Strategic Risk Register • Service Risk Register • Project Risk Register • Local Code of Governance - pages 12-24

Internal Audit Function – The Council has an independent and objective internal team that provides assurance and advice to all levels of management and elected and lay members on the quality of operations within the Council and is one of the key elements of the Council's governance framework. Its mission is to enhance and protect organisational value by providing risk-based and objective assurance, advice and insight.	• Internal Audit Strategy • Internal Audit Charter • Internal Audit Updates • Annual Report of the Governance and Audit Committee • Local Code of Governance - pages 20-24 • Internal Audit Annual Report
External Audit and Regulators – The council fully supports and is transparent with its external auditors and regulators on all aspects of council business including finance, education, social services, and other corporate activities which in turn provides independent validation of its internal controls and practices.	• External Audit – Monitoring Report • External Audit: Annual Audit Summary • Estyn Reports • Care Inspectorate Wales Reports
Compliance with Regulations and Ethical Procurement – The council have systems and processes in place to ensure compliance with all procurement standards and regulations, and all contracts are managed as such when due for renewal or when newly established. The council ensures that procurement decisions are made impartially and in the best interests of the council and the community by upholding ethical standards in procurement processes, including fairness, integrity, and avoidance of conflicts of interest.	• Procurement Handbook • Procurement Strategic Plan 2024 to 2029 • IT Procurement Policy • Data processing policy and agreement • Annual Governance Statement • STAR Procurement Review and Action Plan • Safeguarding in procurement and contracting • Sustainable Procurement Policy • Local Code of Governance - page 7
Contract Management and Performance Monitoring – The council have robust contract management practices to monitor supplier performance against agreed terms, service level agreements (SLAs), and KPIs, ensuring contracts deliver quality outcomes and are properly managed throughout their lifecycle.	• Contracts Management Strategy • Annual Report of the Governance and Audit Committee

What and how can we do better?

Below are the areas identified as opportunities for improvement and monitoring throughout 2025/26.

Improvement matters identified	Actions identified to address weaknesses	Lead Officer / Service / Board	By when
1. The council need to continue modernising its digital and data infrastructure	- Develop a Data Strategic Plan with the aim of continuing our journey to becoming a data informed Council - Continue to progress the 4 key priorities of the Digital Strategic Plan - Develop the Chatbot interface to provide an improved customer experience - Review customer contact centres way of working and consider recommendations to improve customer experience.	Transformation	March 2027
2. The council must ensure that it meets the requirements of the new Procurement Act 2023	Implement agreed outstanding actions from the Procurement Improvement Plan	Resources	March 2026
3. The financial resilience of the council is under pressure due to the cost of living crisis and a decrease in funding	- Maximise the grants available to the council - Monitor and review the Medium Term Financial Plan (MTFP) - Identify savings for 2026/27 onwards - Review and streamline processes to improve efficiency and effectiveness of services and reduce the impact of reduced funding	Resources	March 2026
4. The council needs to manage and rationalise assets to ensure that they are needed, are fit for purpose and if not identify the	Review and publish a new small holding asset management strategic plan	Highways, Waste & Property	March 2026

work required to bring them up to standards.	- Continue to implement the new Computer Aided Facilities Management System - Undertake rationalisation of council assets in line with Asset Management Strategic Plan 2024-29		
5. The council need to respond to identified workforce planning challenges including its age profile in some services and recruitment and retention problems in others	- Review, revise and implement a recruitment drive for Council Business and the Provider Unit - Services to reflect and work with HR on making every effort to 'grow your own' staff through training and development opportunities that enhance recruitment and retention - Dyfodol Môn graduate scheme– continue with the programme in 25/26 - creating dynamic opportunities for ambitious graduates to develop specialist skills and start a career with the council.	Transformation/ All Services	March 2026

The Council's Service Output Position Statement – 2025

Please note below the response of each service against the categories of evidence for 2025

Service	Service planning and performance	Financial planning	Workforce planning	Governance; procurement & contract management and Risk & Audit
Adult Services	Outstanding	Exceeds	Exceeds	Meets
Children & Families Service	Outstanding	Exceeds	Exceeds	Exceeds
Council Business	Meets	Needs Improvement	Meets	Meets
Highways, Waste & Property	Meets	Exceeds	Exceeds	Meets
Housing	Exceeds	Exceeds	Exceeds	Meets
Learning	Exceeds	Outstanding	Exceeds	Exceeds
Regulation & Economic Development	Exceeds	Outstanding	Exceeds	Exceeds
Resources	Exceeds	Outstanding	Meets	Exceeds
Transformation	Exceeds	Exceeds	Outstanding	Exceeds
Overall Output	Exceeds	Exceeds	Exceeds	Exceeds

Progress against identified improvement matters from previous self-assessment

The table outlines the improvement actions identified last year and an update on progress can be found below

Improvement matters identified	Lead Officer / Service / Board	Update on progress
1. The Council needs to review and revise the Corporate Scorecard provision following the adoption of the Council Plan 2023-2028	Transformation	A new Corporate Scorecard was designed and reported to the Executive and Corporate Scrutiny Committees on a quarterly basis.
2. The Council needs to continue modernising its digital and data infrastructure	Transformation	The Digital Strategic Plan is now in place which aims to provide a clear direction and vision for corporate IT based upon the Council's general principles and priority areas for ICT service delivery. The council successfully implemented a new telephony system for the majority of offices and sites. A data maturity assessment was completed during the year and the working group are working on the next steps to improve on its data use including a new data strategy.
3. The Council must ensure that it meets the requirements of the new Procurement Act 2023	Resources	The Procurement Strategic Plan and revised Contract Procedure Rules were approved by the Executive in December 2024. The Procurement Act 2023 was brought into force in February 2025. A successful training programme was carried out at the start of the year, where over 100 of our staff received the training on the new procurement act which was delivered internally. A procurement handbook and templates are also in place. A Procurement Manager is now in post on an interim basis due to difficulties in recruiting.

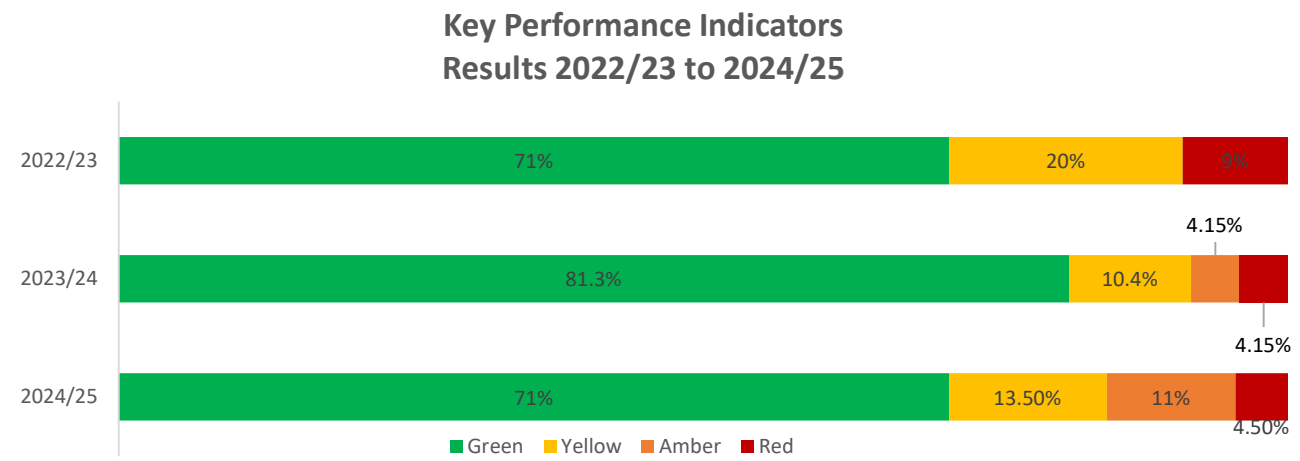
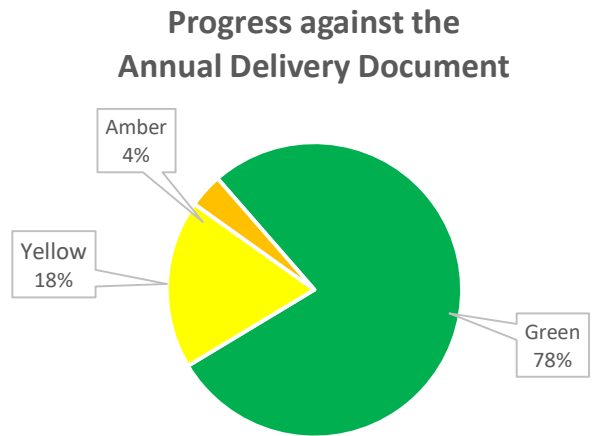
4. The financial resilience of the Council is under pressure due to the cost of living crisis and a decrease in funding	Resources	The Council secured £47.748m of capital grants in 2024/25, which is equivalent to 61% of the total capital funding in 2024/25. MTEP for the period 2025/26 to 2027/28 was approved by the Executive in September 2024, with the period of the plan being increased from 2 to 3 years. Service budget savings were put forward for consultation during the budget setting process in early 2025. Savings that were identified and not implemented in 2025/26 will potentially be put forward to the Executive as part of the 2026/27 budget process. Work is ongoing across all services to identify areas where processes can be streamlined in order to reduce costs. A cost of change reserve has been set up to fund any expenditure required to implement changes. Examples of funding provided to date include: 1. Maritime Income – Fund the purchase and implementation of Chip and Pin machines which allows visitors to pay for services by card at beach locations 2. Transport Review – to fund the cost of an external review of the Council's transport provision across all services, with the aim of identifying changes that provides a more coordinated service at a lower cost 3. Citizens Access Portal – the aim of the system is to allow Council Taxpayers, Housing Benefit claimants and landlords access to their accounts so that they can receive information about their account and update the Council on changes electronically
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5. The Council needs to manage and rationalise assets to ensure that they are needed, are fit for purpose and if not identify the work required to bring them up to standards.	Highways, Waste & Property	All mitigating actions to manage RAAC within council buildings were actioned during the year. The Asset Management Strategic Plan 2024-2029 was published during the year. A new Computer Aided Facilities Management System was adopted in Summer 2024 with the aim for it to be used to manage all council assets, maintenance and build projects. Work is underway to develop a new small holding asset management strategic plan with plans in place to complete the work during 2025/26.
6. The Council needs to respond to identified workforce planning challenges including its age profile in some services and recruitment and retention problems in others	Transformation	The council continue to undertake a recruitment initiative for the Provider Unit. During 2024/25 the Denu Talent scheme only focussed on Adult Services, specifically to try and recruit to difficult to fill posts. Five young people successfully undertook a placement over 10 weeks, with two being recruited to permanent posts following the scheme. The People Risk Management Strategy was reviewed and republished during the year. New dedicated Careers pages were published on the Council Website (Jobs and Careers). There continues to be a drive to increase retention of staff in areas that see higher turnover. Staff turnover for 2024/25 was 8% compared to 9% the previous year, and staff retention was 93% for 24/25.

Performance Report

Key Performance Highlights

Some of the key highlights for this year’s performance can be found below.



Progress against the Council's Wellbeing Objectives

The following pages summarise the Council's progress in 2024/25 towards achieving its three Wellbeing Objectives, the Council Plan and its longer-term outcomes for 2028.

The detailed evidence and updates that sit behind these summaries are available in **Appendix 1** where RAYG status and progress against each action in 24/25 is explained in full.

Together, these sections show how the Council is progressing from **short-term annual actions** (24/25 commitments) towards achieving its **long-term objectives** (outcomes by 2028).

The following diagram demonstrates how the information in this section connects to the detailed updates in Appendix 1, shown as 24/25 Commitments below.



Each table below sets out:

- what the Council aims to achieve **by 2028** (the long-term outcomes),
- what we **committed to deliver in 2024/25** (from the Annual Delivery Document 24/25), and
- how much progress has been made during the year.

Wellbeing Objective 1 - The people of Anglesey are educated to reach and fulfil their long-term potential

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we committed to:	RAYG
Welsh Language	Ensured that when our Welsh language promotion strategy is revised in 2026 it is appropriate to respond to the results of the last census	On-track	• Complete a secret shopper review of Welsh language provision amongst council services • Undertake a self-assessment of compliance against Welsh language standards	Green
Welsh Language	Updated our Welsh language policy and developed a new policy on the use of Welsh in the workplace	On-track	• Review our Welsh Language Policy	Green
Welsh Language	Used grant programmes to develop the Welsh language in the economy and with businesses	Complete	• Implement the second phase of the Arfor programme, by ○ Providing 15 Enterprising Community Grants to businesses, ○ Supporting 30 businesses to increase their use of the Welsh language,	Green
Welsh Language	Expanded our training offer to create increased opportunities for our staff, councillors, partners and the island's residents to develop their Welsh language skills	On-track	• Provide opportunities for staff and elected members to improve their Welsh language skills by: ○ Hosting a set of three Welsh language training classes ○ Monthly campaigns to encourage use of Welsh ○ Work with partners to increase the use of Welsh in the workplace • Promote the OgiOgi app to encourage parents and guardians to make more use of the Welsh language with their children	Green

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we committed to:	RAYG
Education	Ensured that the communities for learning modernisation strategy creates effective schools with strong leadership and an appropriate teaching environment	On-track	• Provide professional development opportunities for school teachers and support staff based on identified individual and school priorities • Progress the Modernising Learning Communities and Developing the Welsh Language Strategy by ○ Opening the new Ysgol y Graig Foundation Phase building to pupils ○ Consult on a potential new Ysgol Uwchradd Caergybi development ○ Engaging with learners and residents to review post-16 education provision on the island ○ Improve Ysgol Santes Fair; and ○ Opening community rooms at Ysgol Morswyn, Ysgol Llanfawr and Ysgol y Graig	Green
Education	Developed the Welsh language across all learning settings by realising the aims, objectives and outcomes set in the 'Welsh in Education Strategic Plan'	On-track	• Immerse 96 pupils with little or no Welsh skills through language centres • Develop a 5 year Welsh language improvement scheme in Ysgol Uwchradd Caergybi • Ensure that all year 6 pupils have a language skill development plan	Green
Education	Ensured the best possible experiences and progress for children and young people by delivering the Curriculum for Wales in all learning communities across the island	On-track	• Enable children and families to access community based educational activity programmes outside of traditional school hours including activities with Môn Actif, Actif North Wales, the youth service, Urdd Ynys Môn and the Food and Fun scheme (Cynllun Bwyd a Hwyl) and support Public Health Wales' Healthy Weight campaign	Green

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we committed to:	RAYG
			- to reduce obesity and related health issues within our communities • Ensure that there are opportunities for children and young people's voices to be heard by ○ Providing opportunities to respond to public consultations that affect them ○ Arranging school visits to the Council and Council Chamber ○ Holding meetings of the Children and Young People forum and inviting guest speakers; and ○ Ensuring that school councils can meet with their School Governors and Local Elected Members when requested • Provide opportunities for school children to attend and take part in educational activities at Oriel Môn and Anglesey Archives • Increasing the wellbeing opportunities available in our schools by ○ Increasing access to school meals for 75% of pupils ○ Supporting schools and pupils through the Healthy Schools programme and increasing mental health awareness	
Education	Increased educational opportunities for adults so that Anglesey's residents can continue to develop personally throughout their lives	On-track	• Work in partnership with Gwynedd & Môn Community Learning to offer a range of adult learning opportunities throughout Anglesey	Yellow

Wellbeing Objective 2 - The people of Anglesey are safe, healthy and as independent as possible

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we committed to:	RAYG
Social Care and Wellbeing	Reviewed and modernised the way we provide care and support	On-track	- Integrate the day care provision in the Holyhead area within the community - Consult on the Day Care Strategy - Work to reduce the number of school and care leavers who are NEET (Not in Education, Employment or Training) by - Piloting an early intervention hub in Ysgol Syr Thomas Jones, Amlwch, to target pupils - Ensuring that pupils at risk of being NEET are identified earlier in all secondary schools - Target care leavers between the ages of 18-24 who are NEETs - Identify local employers and council services where young people can gain valuable work experience - Welcome over 500,000 visits to Mon Actif centres - Invest £1M in Mon Actif facilities - Work with Medrwn Môn and utilise Shared Prosperity Fund (SPF) grant to provide bespoke professional development opportunities, including trauma informed training, to staff and the wider community and work towards being a Trauma Informed Island - Modernise youth clubs and review the provision to identify future improvements	Green
Social Care and Wellbeing	Improved and extended the supported housing provision	On-track	- Open a new supported living accommodation schemes in Valley and Rhostrehwfa - Create a modernisation programme for community accommodation	Yellow

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we committed to:	RAYG
			Relocating Specialist Children Services provision to a newly renovated property	
Social Care and Wellbeing	Extended opportunities for people to receive care closer to their local communities	On-track	- Increase participation in the integrated community hubs by improving the accessibility of the hubs, providing social prescribing services within some of the hubs, - Co-locating the memory assessment service (MAS) and dementia activities within Canolfan Glanhwfa, Llangefni. - Develop an Age Friendly Network, focusing on the eight domains of the Age Friendly Communities, - Hold Older People's Forums in community locations to ensure that activities extend across the island. 400 people taking part in the Dementia Actif scheme	Green
Social Care and Wellbeing	Developed additional internal provision for looked after children, Cartrefi Clyd and foster carers	On-track	- Identifying properties for our 4th and 5th Cartref Clyd properties on the island - Provide opportunities for young carers to undertake free swimming sessions in Mon Actif centres - Work with 250 young people to improve their health and wellbeing including activity to support the healthy weight campaign	Yellow
Housing	Opened a third extra-care housing scheme with plans in place for a fourth	Behind Schedule	Secure funding and planning permission for a new Extra Care development at Tyddyn Mostyn, Menai Bridge	Yellow
Housing	Agreed the priorities for tenant participation activities and the	On-track	Increase the response rates to enquiries at the first point of contact be that via our digital, telephone or face to face channels	Green

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we committed to:	RAYG
	allocation of resources to include the voice of our tenants in our services		- Modernise and upgrade the telecare system - Work towards upgrading the access doors to around 220 shared housing stock in preparation for the digital switchover	

Wellbeing Objective 3 - The people of Anglesey and its communities enjoy, protect and enhance their built and natural environment for future generations

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we will	RAYG
Housing	Addressed the energy efficiency/fuel poverty agenda and will be working towards achieving the Welsh Housing Quality Standards II	On-track	Prepare a Target Energy Pathway for the council's housing stock detailing how the affordable heating and decarbonisation standards will be met	Green
Housing	Conducted a housing market needs assessment, together with an annual housing prospectus, allowing us to report on the increase in the supply of affordable housing	On-track	Complete a local housing market assessment (LHMA) and annual housing prospectus	Green
Housing	Increased the choice and number of homes available for the island's residents, together with assisting households to purchase their first homes	On-track	- Develop 30 new homes - Buy 15 old Council Houses - Facilitate the renovation of 60 empty houses, - Assist up to 10 first time buyers to enter the housing market	Green
Economy	Supported low carbon energy production schemes	On-track	- Provide support and advice to Menter Môn on the development of a Hydrogen Hub in Holyhead. - Influence and collaborate with the UK Government, Great British Nuclear, the Welsh Government and the other key stakeholders on large scale energy developments	Green

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we will	RAYG
Economy	Worked together to realise circular economy objectives	On-track	• Work with Menter Môn to invest the £600k Circular Economy grant funding from WG to establish re use 'trwsio' locations on the Island.	Green
Economy	Developed new business units to help local businesses grow and develop	On-track	• Secured planning permission for business units in Amlwch and work with partners to identify further capital funding opportunities • Progress the Ynys Môn Town Centres Improvement Strategy by ○ Engaging with stakeholders on individual Town Centre Plans ○ 30 businesses accessing Transforming Towns and Place Making Funding; and ○ Secure funding for over 10 property facelift schemes	Green
Economy	Capitalised on additional investment for the benefit of the local economy	On-track	• Continue implementing the North Anglesey Economic Regeneration Plan by securing external funding from the Nuclear Decommissioning Authority (NDA) • Work with Stena, the UK and Welsh Governments and the North Wales Ambition Board to develop the Anglesey Freeport and to ensure investment opportunities for Holyhead Port, specifically ○ Securing final business case approval ○ The growth and regeneration of Holyhead Port; and ○ The Port Health Authority • Deliver the Holyhead Levelling Up Fund programme • Deliver the 15 Anglesey based projects and the 10 regional projects funded by the UK Shared Prosperity Fund (UKSPF) • Influence Energy Island Programme developments and developers	Green

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we will	RAYG
Economy	Grown and promoted the visitor economy in a respectful and sustainable manner to secure benefits for our communities and visitors	On-track	- Deliver the Area of Outstanding Natural Beauty (AONB) Management Plan (2023-2028) - Welcome 52 cruise ships to the island - Collaborate with the Welsh Government to improve visitor activities	Green
Economy	Redeveloped redundant industrial sites and brownfields	On-track	Develop and implement a Brownfield Programme which aims to redevelop redundant industrial sites, including the old Anglesey Aluminium site, Rhosgoch, Octel (Amlwch) and old Peboc site, Llangefni.	Yellow
Climate Change	Minimised our direct carbon emissions to ensure that the net zero 2030 target is achievable	On-track	- Review and implement the Towards Net Zero Plan 2022-2025; publish an internal asset carbon emissions data dashboard and submit our carbon emissions report to WG by September 2024. - Progress the Fleet Transformation Plan by increasing the number of low carbon vehicles in the fleet by 13 (dependent on capital and grant funding) - Adopt the new Local Development Plan (LDP) Delivery Agreement – present to full Council and submit to WG for agreement. - Install low carbon heating systems in nine council buildings.	Green
Climate Change	Increased recycling rates	Behind Schedule	- Work towards achieving the Welsh Government target to recycle 70% of household waste and waste from council buildings - Work with our partners to progress the key objectives of the Resources and Recycling Strategic Plan to improve our waste and recycling collection service	Amber

Strategic Objective	By 2028 we will have:	Long-term Progress	In 24/25 we will	RAYG
Climate Change	Ensured that services consider climate change and biodiversity as fundamental issues when reaching decisions	On-track	• Ensure committees are able to give consideration to climate change and biodiversity when making a decision by updating the reporting templates • Implement flood control plans across the island (dependent on WG funding): ○ deliver six small scale schemes ○ develop business cases for four large scale schemes • Adopt and publish a local flood risk management strategy	Green
Climate Change	Creating extensive low carbon travel options for the island's residents and visitors	On-track	• Implementing active travel plans at Amlwch and Holy Island, as well as infrastructure improvements between Malltraeth and Llanfairpwll • Appoint an EV charging point supplier to install public EV charging points across the island (dependent on grant funding)	Green

The Corporate Scorecard and Key Performance Indicators

82.5% of the Corporate Scorecard performance indicators performed above target or within 5% tolerance of their targets for the year.

The Council's year on year performance for all comparable indicators (28 in total) demonstrates that 20 (72%) have improved during the year, 6 (21%) have declined and 2 (7%) have maintained on their performance levels.

Overall 71% of the indicators that are used to monitor the Wellbeing Objectives were Green against target for the year.

The scorecard report highlights some of the good performance some of these highlights include:

- 30 businesses received support to develop the Welsh Language as part of the ARFOR programme before it came to an end
- There were over 565,000 visits to Môn Actif Leisure Centres where people undertook exercise during the year, an increase of 50,000 visits compared to the previous year
- Only 1.9% of pupils leaving school at the end of year 11 were known not to be in employment, education or training (NEET) for 2024, an improvement on the 4% in 2023. This was possible due to improved identification of young people at risk of being NEET and working closely with them to identify and find successful outcomes.
- 86% of tenants were satisfied with responsive repairs undertaken at their properties throughout the year, an increase from the 80% that were satisfied in 2023/24
- Close to 98% of planning applications are now determined in time
- All three road categories were better than their targets with 1.8% in poor condition for A roads, 1.6% in poor condition for B roads and 7.3% in poor condition for C roads.

The report also highlights seven areas that underperformed against set targets. These were discussed by the Corporate Scrutiny Committee and the Executive and improvement will be led and monitored by the Leadership Team. The indicators are:

1. The average number of children undertaking private Môn Actif swimming lessons throughout the year
2. The average number of calendar days to let lettable units of accommodation (excluding DTLs)
3. The average number of calendar days taken to deliver a Small and Medium Disabled Facilities Grant
4. The average number of calendar days taken to deliver a Major Disabled Facilities Grant
5. The total number of customers with an annual mooring contract
6. The percentage of domestic waste reused, recycled, or composted
7. The percentage of FOI requests responded to within timescale

Further information, including all indicators, can be found in the [Q4 Scorecard for 2024/25](#).

National Resident Survey 2024

Overview

The Council took part in the *National Resident Survey 2024*, coordinated by Data Cymru, to better understand residents' views on local services, quality of life, and wellbeing across Anglesey.

A total of **1,737 residents** took part, providing valuable feedback that helps the Council measure progress and shape future priorities.

What residents told us

The results show that most people feel positive about living on Anglesey:

- 67% are satisfied with the island as a place to live
- 85% would recommend Anglesey as a place to live
- 86% feel safe during the day, and 65% feel safe after dark
- 78% rate local air quality as good
- 52% believe the Council provides high-quality services
- 41% believe the Council provides value for money
- 32% said they trust the Council

Next Steps

The feedback will be used to help the Council strengthen how it communicates and engages with residents, improve understanding of local priorities, and continue to focus on delivering high-quality, accessible services.

These insights also provide an important benchmark for tracking changes in public perception over time, helping the Council measure the impact of its work and improvement programmes.

Staff Survey 2024/25

Overview

During 2024/25, the Council carried out a Staff Survey to better understand staff views and experiences of working for the council. The survey explored themes such as leadership, communication, organisational culture, wellbeing, and awareness of the Council's priorities. The feedback received has provided valuable insight into what is working well and where improvements can be made.

What staff told us

There were **429 responses**, representing a **28% response rate**. The survey grouped questions into **12 themes**, each made up of several statements exploring staff experience, engagement, and workplace culture.

Overall, the survey highlighted a strong sense of pride and commitment among staff, alongside positive views on teamwork and awareness of the Council's direction. It also identified areas for further improvement, including how the Council communicates across the organisation and how it continues to support wellbeing and development in the workplace.

Theme	% positive
Proud	80%
Council Leadership	63%
Leadership Team	64%
Service Leadership	79%
Council Plan	63%
Skills Development	74%

Theme	% positive
Change	54%
Partnership Working	60%
Customer Service	70%
Staff Wellbeing	71%
Communication	73%
Overall Satisfaction	85%

Next steps

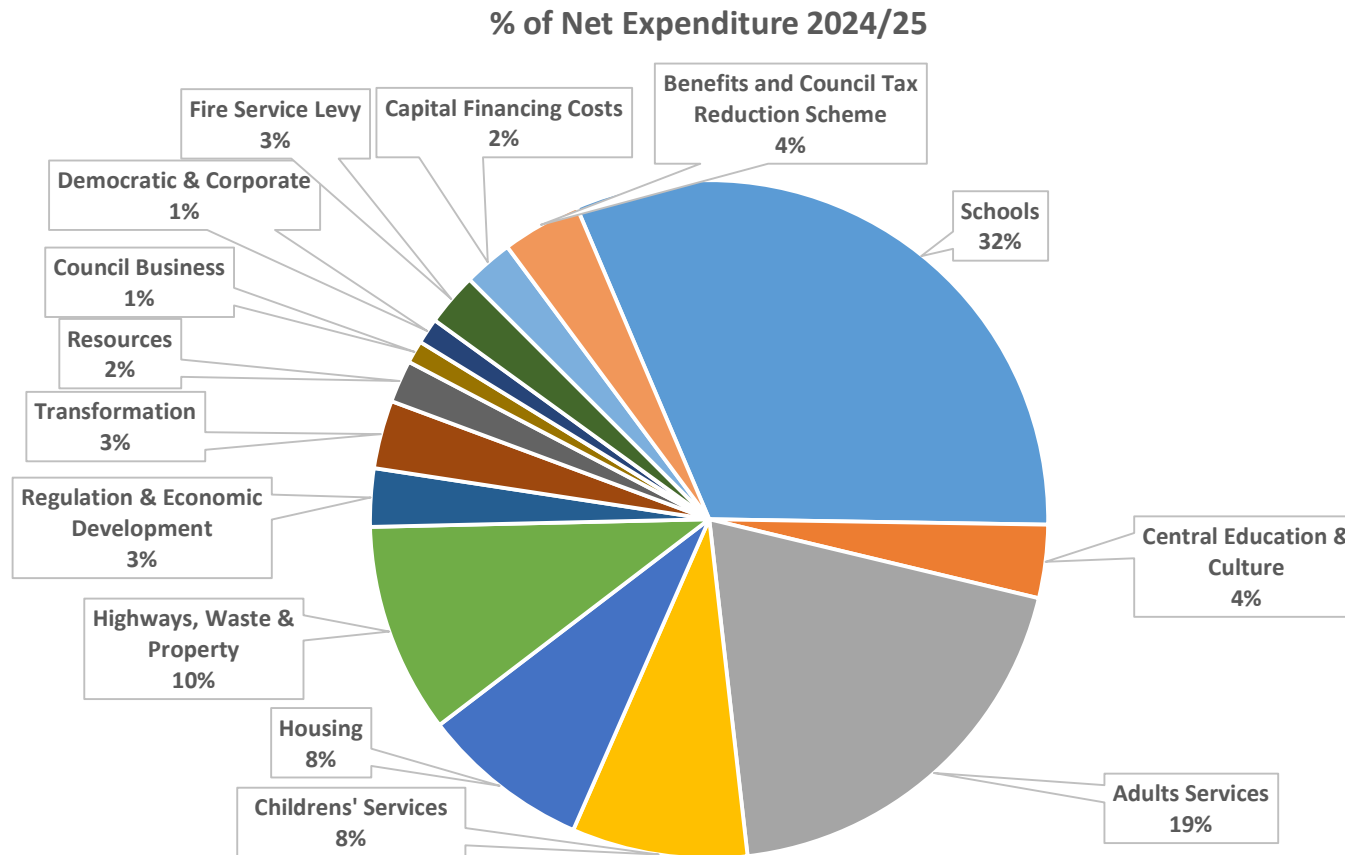
The results have been shared with senior leaders and the Executive and will form the basis of a *Staff Survey Action Plan*.

This plan will focus on maintaining the strengths identified and addressing the areas where staff feel further progress can be made.

By acting on this feedback, the Council aims to strengthen its culture, improve internal communication, and ensure staff feel valued and supported in delivering key services for residents.

Financial Revenue Outturn 2024/25

The revenue outturn split per Service for the financial year ending 31st March 2025, including the Housing Revenue Account (HRA), can be found in the chart below:



Further information on the [Revenue Outturn for 24/25](#) and the [HRA](#)

Appendix 1 - Detailed updates on work undertaken in 2024/25

A RAYG (Red, Amber, Yellow, Green) system has been designed to summarise performance –

RAYG	Description
Green	Nearly all (90%+) of the planned work has been completed with very few exceptions to be completed in the following year
Yellow	70% to 90% of the work has been completed with remaining work scheduled to take place in the following year
Amber	50% to 70% of the work has been completed with remaining work scheduled to take place in the following year or some work delayed
Red	Less than 50% of the work completed, the work has not yet been undertaken or has been cancelled

Wellbeing Objective 1 - The people of Anglesey are educated to reach and fulfil their long-term potential

Strategic Objective	Key Action	Update	Status
Welsh Language	Complete a secret shopper review of Welsh language provision amongst council services	A secret shopper exercise of the Council's telephone services and specifically its Welsh language provision was carried out during the year.	Green
Welsh Language	Undertake a self-assessment of compliance against the Welsh Language Standards	Self-assessment undertaken during the year. Results can be found in the Welsh Language Annual Report	Green
Welsh Language	Review our Welsh Language Policy	The revised Welsh Language Policy was approved by the Full Council in March 2025	Green
Welsh Language	Implement the second phase of the Arfor programme	£1m in grant money to support the economic development and the Welsh language for businesses on Anglesey has now been fully spent. The fund provided financial support up to 70% of the total project costs from £6,000 up to £75,000 including capital costs, staff costs, training and equipment costs. Further information on Arfor 2 programme including the Enterprising Community Fund, and other programmes managed by the council can be found on the council website .	Green
Welsh Language	Provide opportunities for staff and elected members to improve their Welsh language skills:	The council have provided numerous opportunities for staff and elected members to improve their Welsh language skills during the year.	Green

Strategic Objective	Key Action	Update	Status
	a) Hosting a set of three Welsh language training classes b) Regular campaigns to encourage use of Welsh c) Work with partners to increase the use of Welsh in the workplace	a) Five Welsh language classes effective since September 2024; Entry-level, foundation and intermediate weekly classes, 10-week confidence building course and a 10-week language skills development course. b) Campaigns have been ongoing throughout the year including; • coffee mornings with learners and their line managers, • Welsh challenge shared monthly through the staff emails, • Acknowledgement given to the council's practices by the Welsh Language Commissioner in two compliance promotion events. c) Collaboration activity as part of the Gwynedd and Anglesey Public Services Board Welsh language subgroup to carryout research on recruitment practices. Officers have also been leading Fforwm Iaith Ynys Môn (Anglesey's Welsh language forum) sub-groups working with workplaces and education providers.	
Welsh Language	Promote the OgiOgi app to encourage parents and guardians to make more use of the Welsh language with their children	The OgiOgi app was successfully promoted during the year with the help of appointing a part-time facilitator using ARFOR programme funding until March 2025. 51 parent and child groups were visited, and conversations held with 379 parents. The number of downloads have in turn increased.	Green
Education	Provide professional development opportunities for school teachers and support staff based on identified individual and school priorities	A universal school programme was provided during the year. All school staff are provided with opportunities to develop their careers. Training opportunities were also provided during inset days (in-service training) for school based staff.	Green

Strategic Objective	Key Action	Update	Status
Education	Progress the Modernising Learning Communities and Developing the Welsh Language Strategy by • Opening the new Ysgol y Graig Foundation Phase building to pupils • Consult on a potential new Ysgol Uwchradd Caergybi development • Start a review the post-16 education provision on the island • Provide community rooms at Ysgol Morswyn, Ysgol Llanfawr and Ysgol y Graig	The new Ysgol y Graig 'fach' unit, a net-zero carbon in operation building opened in September 2024. A consultation on the future development of Ysgol Uwchradd Caergybi was planned during 2024/25 and undertaken in early 2025/26. A decision on the new site and development will be discussed with The Executive later in 2025/26. An engagement activity on to review post-16 education provision took place between January – March 2025. The Executive discussed and resolved to further develop a closer working relationship between the existing providers and prepare a strategic plan on how this will be done in it's meeting in May 2025 Work was completed on the community rooms at Ysgol Graig, Ysgol Llanfawr and Ysgol Morswyn	Green
Education	Immersing 96 pupils with little or no Welsh skills through language centres	96 pupils immersed, with 30 receiving direct support from Holyhead High School's language centre.	Green
Education	Developing a 5 year Welsh language improvement scheme in Ysgol Uwchradd Caergybi	Ysgol Uwchradd Caergybi Project Group reported that progress is as expected with a number of positive activities taking place. 4 Teachers receive Language support through collaboration with the National Centre for Learning Welsh 20 members of staff receiving training through Sgil Iaith to be able to teach bilingually.	Green

Strategic Objective	Key Action	Update	Status
Education	Ensuring that all year 6 pupils have a language skill development plan	All year 6 pupils have a language skill development plan in place. In addition, the Welsh Language Centre launched a new website to support parents and teachers on the Welsh language. A Welsh language charter is in place in all schools. All school catchment are working together on the Welsh language grant scheme to increase the use of Welsh beyond class.	Green
Education	Enable children and families to access community based educational activity programmes outside of traditional school hours including activities with Môn Actif, Actif North Wales, the youth service, Urdd Ynys Môn and the Food and Fun scheme (Cynllun Bwyd a Hwyl) and support Public Health Wales' Healthy Weight campaign to reduce obesity and related health issues within our communities	A collaboration took place between Môn Actif and PIPYN for pre-school age children with the aim of ensuring that each child has a healthy weight. 11 Primary schools have signed up to take part in the School Health Research Network (SHRN) questionnaire. Schools are raising attention for any consultations that take place so that pupils can feed back. Chartwells, the current provider of school meals on Anglesey, attended schools throughout the year to get valuable feedback from children on their lunch menus.	Green
Education	Ensuring that there are opportunities for children and young peoples voices to be heard by - providing opportunities to respond to public consultations that affect them - arranging school visits to the Council and Council Chamber	Several children and young people's forums were held in the council chambers in the main council offices in Llangefni during the year. Representatives from primary and secondary schools attend the forums to learn, collaborate and work together to respond on behalf of children and young people. Two primary schools visited the Council Offices for a tour, to meet the Council Chairman and other senior officials as well as take part in discussions around the work the council undertake.	Green

Strategic Objective	Key Action	Update	Status
	- holding meetings of the Children and Young People forum and inviting guest speakers; and - ensuring that school councils can meet with their School Governors and Local Elected Members when requested	Local councillors also visited numerous schools as part of their work on the Education Scrutiny Panel.	
Education	Provide opportunities for school children to attend and take part in educational activities at Oriel Môn and Anglesey Archives	Several schools visited Oriel Môn and the Archives throughout the year. A few off-island schools also visited Oriel Môn to take part in activities and view and learn about historic artifacts.	Green
Education	Increase the wellbeing opportunities in our schools by - Increase access to school meals for 75% of pupils - Supporting schools and pupils through the Healthy Schools programme and increasing mental health awareness	Free school lunches is offered to all primary school aged children on the island, 75% of whom are currently accessing free school meals. Work is ongoing to increase the number of children accessing free school meals in primary schools as well free school meals to those that are eligible in secondary schools. Healthy Schools Team supports, promotes and seeks grants to support the schools in terms of the health and wellbeing element. Healthy Schools team supports with the Menstrual Dignity work with all schools with menstrual goods and support with this work also taking place in the community e.g. sports clubs. The team worked with 6 schools with a Health and Wellbeing support scheme in their School Development Plans.	Green

Strategic Objective	Key Action	Update	Status
Education	Work in partnership with Gwynedd & Môn Community Learning to offer a range of adult learning opportunities throughout Anglesey	A wide range of courses were made available throughout Anglesey and Gwynedd, helping adult learners to: • Develop new skills • Return to education • Expand knowledge in subjects of interest • Prepare for further learning, training or employment Gwynedd and Môn Community Learning provides opportunities for formal and informal learning, from foundation level courses all the way through to professional qualifications – all delivered bilingually wherever possible, and accessible to all. Many courses were run during the year, although slightly behind the planned delivery due to issues with academic providers for some courses. Further work continues into 2025 to help increase the provision.	Yellow
Education	Adopt and begin to deliver a new strategy for the provision of Library Services	The Draft Library Service Strategic Plan is still in its draft format. This work was paused in 24/25 due to the imminent implementation of the 7 th Welsh Public libraries Framework. As the framework is now in place, work will continue on the draft with the expectation of completing the work by March 2026.	Amber

Wellbeing Objective 2 - The people of Anglesey are safe, healthy and as independent as possible

Strategic Objective	Key Action	Update	Status
Social Care and Wellbeing	Integrate the day care provision in the Holyhead area within the community	The day care provision in the Holyhead region has now been integrated within the community following the closure of Canolfan Morswyn in September 2024. The community team ran groups in Holyhead Library, Holyhead Leisure Centre, Gwelfor community Hub and the Sea Scouts building on different days of the week.	Green
Social Care and Wellbeing	Consult on the Day Care Strategy	Some work was done on the strategy, however further work is required. This work will be on going throughout 25/26.	Amber
Social Care and Wellbeing	Work to reduce the number of school and care leavers who are NEET (Not in Education, Employment or Training) by • Piloting an early intervention hub in Ysgol Syr Thomas Jones, Amlwch, to target pupils • Ensuring that pupils at risk of being NEET are identified earlier in all secondary schools • Target care leavers between the ages of 18-24 who are NEETs • Identify local employers and council services where young people can gain valuable work experience	There was a reduction in number of NEET school leavers during the year, from 4% in 2024 to 1.9% in 2025. An early intervention hub continues to be piloted in Ysgol Syr Thomas Jones, Amlwch and a review of the provision will be undertaken in 2026. A dedicated resources is in place for targeting learners at risk of becoming NEET in the 5 secondary schools on the island. The council continue to work and provide support for care leavers between 18-24 who are NEET. The council established a Voluntary Work Experience scheme as a pilot between November and January which was successful. The aim of the voluntary work experience is to reduce NEET numbers aged 16-18. A similar project is in development for 2025/26.	Green

Strategic Objective	Key Action	Update	Status
Social Care and Wellbeing	Welcome over 500,000 visits to Mon Actif centres	Môn Actif Leisure Centres welcomed close to 566,000 visits where people would be undertaking physical activities for the year.	Green
Social Care and Wellbeing	Invest £1M in Mon Actif facilities	Over £1m was spent to upgrade Môn Actif facilities during the year from Capital, SPF and Sports Wales Capital Grant funding. Work included: • New flooring in the main hall at Plas Arthur and Holyhead leisure centre • Improving energy efficiency in Plas Arthur by installing new cladding and windows • Improved CCTV at Plas Arthur • External lighting for the 3G pitches at Amlwch and David Hughes leisure centres	Green
Social Care and Wellbeing	Work with Medrwn Môn and utilise Shared Prosperity Fund (SPF) grant to provide bespoke professional development opportunities, including trauma informed training, to staff and the wider community and work towards being a Trauma Informed Island	As part of the journey to becoming a Trauma Informed Island, over 700 staff from statutory partners, third sector, elected members and community organisations and foster carers have participated in trauma informed interventions/ professional learning. These vary from 1 day sessions to full accreditations that will help support our children, young people and families. This figure continues to grow week on week. Over 70% of the council's mainstream foster carers have now passed the Trauma Informed Diploma for Foster Carers, this is the first of its kind in Wales and feedback from our Foster Carers has been positive. Training for Ynys Mon's North Wales Police and the council's Cartrefi Clyd staff will be undertaken in 25/26 which also embeds a Trauma Informed Supervision model for all Cartrefi Clyd buildings.	Green

Strategic Objective	Key Action	Update	Status
		Cllr Dyfed Jones, portfolio holder for Children, Young People and Families is following the footsteps of the Cllr Gary Pritchard, Council Leader in completing the Diploma in Trauma Informed. Plans are in place to visit every Ward on Ynys Môn during 2025/26 taking Trauma Informed into the communities. The aim is for the communities to become a Trauma Informed Island.	
Social Care and Wellbeing	Modernise youth clubs and review the provision to identify future improvements	Thanks to a collaboration with Coleg Llandrillo Menai, Llangefni youth club moved from Plas Arthur Leisure Centre to the college. The site offers a modern building with new equipment and provides a taste of the college campus for future students.	Green
Social Care and Wellbeing	Open a new supported living accommodation schemes in Valley and Rhostrehwfa	The council was successful in attracting £700K grant funding through Welsh Governments Housing with Care Fund (HCF) to purchase a supported living property off the open market in Rhostrehwfa and renovations are ongoing. The supported living accommodation at Valley has opened. A further property in the Gwalchmai area has been purchased, and adaptations will be made in the upcoming months. The project will be run in partnership with our housing department and partially funded by the Housing Revenue Account (HRA).	Yellow
Social Care and Wellbeing	Create a modernisation programme for community accommodation	The Council have ambitious plans to transform and update accommodation options for people with learning disabilities through a program of new developments. Social Services working alongside the Housing Service and local housing associations, the council have been able to invest in several schemes and continue to develop plans in order to upgrade more properties in line with the available funding.	Yellow

Strategic Objective	Key Action	Update	Status
Social Care and Wellbeing	Relocating specialist children services provision to a newly renovated property	The specialist support service for children at Haulfryn is nearing completion with some provision being held there during the year. The full service will not commence until all building work has been completed on the property.	Yellow
Social Care and Wellbeing	Increase participation in the integrated community hubs by improving the accessibility of the hubs, providing social prescribing services within some of the hubs	Canolfan Glanhwfa Community Hub has received funding totalling £1m to complete adaptation and renovation works to its building at Capel Moreia in Llangefni. Since then, community services have been provided for older and vulnerable people with major partners Age Cymru Gwynedd a Môn, Bwyd Da Môn, Carers Trust, Carers Outreach and Adferiad delivering key services. In addition the Centre provides a home for the award winning choirs Côr Ieuenctid Môn and Côr Encor (for people over sixty), stand up comedy classes and community courses by Grŵp Llandrillo Menai. People of all ages came together at an event to celebrate the launch of a new weekly dementia hub in Amlwch. Pupils from Ysgol Gynradd Amlwch joined older members of the community and carers at an open afternoon, hosted by Môn Actif and Age Friendly Ynys Môn at the Memorial Hall. The new hub, run by Dementia Actif Môn, will seek to support people living with dementia as well as their carers. Participants can chat and socialise with one another over a cuppa. Also present with information stalls about their services were North Wales Police, Carers Trust, Carers Outreach Service, Age Cymru Gwynedd a Môn and Tai Môn.	Green
Social Care and Wellbeing	Co-locating the memory assessment service (MAS) and dementia activities within Canolfan Glanhwfa, Llangefni	Canolfan Glanhwfa Community Hub has received funding totalling £1m to complete adaptation and renovation works to its building at Capel Moreia in Llangefni.	Yellow

Strategic Objective	Key Action	Update	Status
		It has not yet been possible to move all activities to the centre due to the ongoing renovation works.	
Social Care and Wellbeing	Develop an Age Friendly Network, focusing on the eight domains of the Age Friendly Communities	The development of an Age-Friendly Island is going from strength to strength. Over the past year we have worked in partnership with several third sector services and organisations to expand this work. The Nifty60s project and the development of the Ynys Môn Dementia Centre at the Glanhwfa centre in Llangefni, are examples of developments that support the health and wellbeing of Ynys Môn residents. The Older People's Commissioner for Wales, Rhian Bowen-Davies visited in October 2024 to discover our ambition to make Ynys Môn such an inspiring Age-Friendly community. She returned for a week-long visit in March 2025 to further immerse herself in initiatives that are available on Ynys Môn. During her visit, the Commissioner was able to visit communities across Ynys Môn; engage directly with older residents to hear about their experiences and learn how local services and groups are supporting people to live and age well. She met with key Council Officers and Elected Members, before witnessing firsthand the range of initiatives that have helped create an Age-Friendly Ynys Môn. Rhian Bowen-Davies took part in a range of community-led initiatives that reflect the island's commitment to helping older people stay active, connected, and independent. These included a 60+ Pickleball class at Canolfan Beaumaris, the Nifty 60s group in Holyhead, and a thriving IT skills class in	Green

Strategic Objective	Key Action	Update	Status
		Benllech delivered by tutors from Grŵp Llandrillo Menai. She also met with members of several age-friendly organisations and groups such as Mencap Môn, Caffi Siop Mechell, Canolfan Glanhwfa's Walking Group, and residents at Hafan Cefni.	
Social Care and Wellbeing	Hold Older People's Forums in community locations to ensure that activities extend across the island	In April 2024, Ynys Môn County Council and Age Cymru Gwynedd a Môn held an Island-Wide Older People's Forum in M-SParc, which brought together older people from all over the island. In the Forum, where there were over 70 people present, there were presentations by several interesting guest speakers. The event was opened by Brenda Roberts, Chair of the Older People's Council, and closed by Cllr. Gwilym Jones, the Age-Friendly Champion. A varied timetable of presentations were held, including Scam Prevention Support to the Action Fraud website to the North Wales Community Alert Bulletin, Citizens Advice Bureau offered support and advice available to help people maximise their income and energy. The presentation referenced to social tariffs, emergency support, tips on keeping the house warm, energy saving tips and more, Carers Outreach Service gave a presentation summarising what is an Unpaid Carer and how Carers Outreach service can help. We got to learn about various schemes, including the respite programme 'Short Breaks Scheme', support at home and with carer's rights, as well as many others. 250 people attended the Older People's Forums over the year. Local forums were also held at Rhosneigr and Bodedern.	Green

Strategic Objective	Key Action	Update	Status
Social Care and Wellbeing	400 people taking part in the Dementia Actif scheme	Dementia Friendly Status for Ynys Môn - Ynys Môn County Council has been honoured as the first Dementia Friendly Council in North Wales, by the North Wales Regional Partnership Board. The Dementia Friendly Ynys Môn project works with local communities to address locally identified priorities. These priorities include identifying areas within communities that need a dementia friendly facility or community building. The project includes working with various organisations, businesses, strategy groups, which work collaboratively to create an Ynys Môn that is dementia friendly Activities continue in Amlwch, Holyhead, Llangoed, Llangefni, Bryngwran, and Bodorgan, with discussions in Rhosneigr about a potential new class in 2025/26.	Green
Social Care and Wellbeing	Identifying properties for our 4 th and 5 th Cartref Clyd properties on the island	The 4th property that will be a respite facility adjacent to Haulfryn day respite for children with disabilities is in planning stages. A further property has been awarded funding to buy off the open market. This search continues to find a suitable property to meet the departments needs and CIW regulations.	Green
Social Care and Wellbeing	Provide opportunities for young carers to undertake free swimming sessions in Môn Actif centres	Support and leisure breaks are provided for young carers through the NCH Young Carers Project and young carers have access to free swimming sessions provided at Môn Actif leisure centres.	Green
Social Care and Wellbeing	Work with 250 young people to improve their health and wellbeing including activity to support the healthy weight campaign	A collaboration took place between Môn Actif and PIPYN for pre-school age children with the aim of ensuring that each child has a healthy weight.	Green

Strategic Objective	Key Action	Update	Status
		11 Primary schools have signed up to take part in the School Health Research Network (SHRN) questionnaire. Schools are raising attention for any consultations that take place so that pupils can feed back. Chartwells, the current provider of school meals on Anglesey, attended schools throughout the year to get valuable feedback from children on their lunch menus.	
Housing	Secure funding and planning permission for a new Extra Care development at Tyddyn Mostyn, Menai Bridge	Funding has been secured for a new Extra Care development in Tyddyn Mostyn, Menai Bridge. A full planning application has been submitted, and work is underway to ensure everything is in place for build when planning is granted.	Yellow
Housing	Increase the response rates to enquiries at the first point of contact be that via our digital, telephone or face to face channels	Wherever possible enquiries are dealt with at the first point of contact through our Cyswllt Môn team. 40% of all queries received during 2024/25 were dealt with by Cyswllt Môn. We continue to develop our digital channels, enabling residents and other customers to make enquiries and find solutions themselves online. A number of new forms were added to the council website and CRM (Customer Relationship Management system) during the year. The new telephone system has led to an improvement in the ability to monitor all calls received via the main switchboard. Data for telephone and digital is monitored regularly by council services and improvements are made based on the data.	Green

Strategic Objective	Key Action	Update	Status
Housing	Modernise and upgrade the telecare system	The telecare system has successfully been modernised and upgraded. Tenants are reporting that this has been a positive change for them.	Green
Housing	Work towards upgrading the access doors to around 220 shared housing stock in preparation for the digital switchover	The national digital switchover was delayed until 2027, however the council pressed ahead with upgrading access doors to shared housing stock. All are now in place and are compliant with the digital switchover.	Green

Wellbeing Objective 3 - The people of Anglesey and its communities enjoy, protect and enhance their built and natural environment for future generations

Strategic Objective	Key Action	Update	Status
Housing	Prepare a Target Energy Pathway for the council's housing stock detailing how the affordable heating and decarbonisation standards will be met	A Stock Condition Survey, an essential part in the preparation of a target energy pathway, was completed in the year. The survey assesses energy efficiency performance and preliminary investment requirements to meet WHQS 23 standards during the year. A five-year contract for the installation of Solar PV and Battery Storage across the housing stock (wherever practical) commenced on site in January 2025. The Welsh Government also awarded the council a further £500k Optimised Retrofit Programme funding in support of the programme. The Target Energy Pathway will detail how the affordable heating and decarbonisation standards will be met. All council housing stock will have one in place in 25/26.	Green
Housing	Develop 30 new homes	Completed: 10 houses Llys Llwydiarth, Pentraeth 10 new houses purchased in Parc y Coed, Llangefni	Green

Strategic Objective	Key Action	Update	Status
		8 flats Garreglwyd Road, Holyhead 4 flats Plas Alltran, Holyhead Under construction: - Cae Braenar, Holyhead – 23 units - Bryn Estate, Llanfaethlu – 9 units - Former Ysgol Niwbwrch site – 14 units	
Housing	Buy 15 old Council Houses	15 new properties acquired during the year 18 have been renovated and are being used as housing stock. 23 were being renovated at the end of March 2025	Green
Housing	Facilitate the renovation of 60 empty houses	63 long-term empty properties brought back into use during 2024/25	Green
Housing	Assist up to 10 first time buyers to enter the housing market	Authorised 13 first time buyer applications.	Green
Housing	Complete a local housing market assessment (LHMA) and annual housing prospectus	The LHMA combines different data to give a comprehensive overview of the housing needs on the island. It outlines household sizes, the types of accommodation required, income levels, and key details about the housing market, affordable housing, and empty properties. This information is crucial for shaping other documents, such as the council's Local Development Plan and Housing Strategy. It also helps the council and its partners make well-informed decisions about future housing provisions. This makes sure that there is a suitable mix of housing is available. Following a public consultation, the final LHMA and annual housing prospectus was sent to the Welsh Government.	Green

Strategic Objective	Key Action	Update	Status
Economy	Provide support and advice to Menter Môn on the development of a Hydrogen Hub in Holyhead.	The council continue to work closely with Menter Môn on developing the Hydrogen Hub in Holyhead, including exploring opportunities to increase its capacity and local benefits.	Green
Economy	Influence and collaborate with the UK Government, Great British Nuclear, the Welsh Government and the other key stakeholders on large scale energy developments	The council continue to engage with the UK Government and Great British Nuclear to ensure that any future nuclear project at Wylfa delivers maximum benefits for Anglesey and minimises local impact. The Council continues to work with both Governments and energy developers to promote Anglesey's opportunities and ensure that local communities benefit from major energy projects. The council also ensure that any potential negative effects and risks are highlighted with every development and communicate these with both the UK and Welsh Governments. Engagement has been made specifically during this period through the statutory planning processes, with specific reference to the proposed solar sites at Alaw Môn and Maen Hir. The council responded to the consultation process before submitting a statutory application (PAC) as part of the Maen Hir project. The Council presented its Local Impact Report for Alaw Môn in October 2024.	Green
Economy	Work with Menter Môn to invest the £600k Circular Economy grant funding from WG to establish re use 'trwsio' locations on the Island	Through the "Tyfu a Trwsio" project with Menter Môn, local reuse and repair initiatives have grown, with community workshops and new partnerships helping to give items a second life. Menter Môn's 'Ffiws' is a collaborative 'maker space' which makes available tools, equipment and technology at different locations across Anglesey and Gwynedd. Menter Môn held close to 70 'Ffiws' workshops with over 400 people attending during 24/25.	Green

Strategic Objective	Key Action	Update	Status
		A trial has also started with St Davids Hospice to reuse suitable items from Penhesgyn (recycling centre) to be sold at their charity shops.	
Economy	Secured planning permission for business units in Amlwch and work with partners to identify further capital funding opportunities	Planning permission has been secured for new business units in Amlwch. Large public consultations were also carried out which demonstrates a strong engagement of over 3000 responses with local people and businesses.	Green
Economy	Progress the Ynys Môn Town Centres Improvement Strategy by - Engaging with stakeholders on individual Town Centre Plans 30 businesses accessing Transforming Towns and Place Making Funding; and - Secure funding for over 10 property facelift schemes	Following engagement with communities and businesses, a £100,000 of Town Centre Revenue grant was secured to finance the work of preparing Holyhead and Amlwch Placemaking Plans. Renovation projects are underway in Canolfan Glanhwfa and have been completed at Market Inn, Llangefni, supported by the Town Centre grant. Grants were awarded for eligible vacant property improvement works, and a pilot frontages painting scheme was launched. Building surveys and refurbishment plans have been commissioned for targeted sites across Holyhead, Llangefni and Amlwch.	Green
Economy	Continue implementing the North Anglesey Economic Regeneration Plan by securing external funding from the Nuclear Decommissioning Authority (NDA)	The Council has secured new funding to support regeneration in North Anglesey, including £50k for the Amlwch Placemaking Plan and gaining funding towards the Marine Terminal development. Several Amlwch property surveys and studies have been undertaken and several small urban improvement projects funded via SPF 'Lle Da'. An application for a further 3 years of funding from the NDA was also submitted to support regeneration activities.	Green

Strategic Objective	Key Action	Update	Status
Economy	Work with Stena, the UK and Welsh Governments and the North Wales Ambition Board to develop the Anglesey Freeport and to ensure investment opportunities for Holyhead Port	Work to establish the Anglesey Freeport continues, with major milestones reached, including partial tax site designation. Progress continues to be made on the Holyhead Gateway project within the Growth Deal. Stena Line continue to lead on developing this scheme with input from the Council.	Green
Economy	Deliver the Holyhead Levelling Up Fund programme	Significant progress continues to be made in the delivery of the Levelling Up Programme in Holyhead. A transformative and visual change in the High Street can now be seen as a number of projects are being implemented. These include the Ucheldre Centre, the former HSBC and Central Buildings, the Empire extension and several dilapidated buildings in the High Street. Work on St Cybi's and Eglwys y Bedd are progressing following delays caused by archaeological investigations at the site. £15m has been claimed from UK Government so far as the Programme enters its final 12 months.	Green
Economy	Deliver the 15 Anglesey based projects and the 10 regional projects funded by the UK Shared Prosperity Fund (UKSPF)	The Council has successfully delivered 25 local and regional projects under the UK Shared Prosperity Fund, supporting community development, skills and employment across Anglesey. A £5 million transition fund was secured for 2025 to help extend key projects for another year, while the Multiply scheme has received additional funding, from regional underspend, to boost adult numeracy and learning opportunities.	Green
Economy	Engage with local businesses and potential inward investors to support employment and prosperity	The Council continues to work with local businesses and new investors to create jobs and attract long-term investment to Anglesey. The formation of 'Freeport Ynys Môn Ltd' marks a major milestone, with its new Board leading future development and ensuring local economic benefits are realised.	Green

Strategic Objective	Key Action	Update	Status
Economy	Deliver the Area of Outstanding Natural Beauty (AONB) Management Plan (2023-2028)	The Council has completed a busy year of work under the AONB Management Plan , including habitat restoration, dark sky initiatives, and the removal of invasive species. Funding has also improved public access to nature at key locations such as the Dingle, Llyn Maelog and Coed y Môr, with new circular walking routes promoted to visitors and residents alike.	Green
Economy	Welcome 52 cruise ships to the island	The Council continues to welcome cruise ships to Anglesey, working with Cruise Wales, town councils and local businesses to ensure visitors enjoy their time on the island. A new self-guided town walk and enhanced visitor experiences at attractions such as Oriel Ynys Môn are helping to spread the economic benefits across local communities. 54 cruise ships were welcomed in total during 24/25.	Green
Economy	Collaborate with the Welsh Government to improve visitor activities	The Council has worked with the Welsh Government to enhance visitor experiences across Anglesey, investing Shared Prosperity Fund support into improved access routes, green spaces and nature conservation.	Green
Economy	Develop and implement a Brownfield Programme which aims to redevelop redundant industrial sites, including; the old Anglesey Aluminium site, Rhosgoch, Octel (Amlwch) and old Peboc site, Llangefni	The Council is working with the Welsh Government and key partners to bring forward the redevelopment of redundant industrial sites such as Peboc in Llangefni, Anglesey Aluminium and Rhosgoch. These brownfield sites represent major opportunities for future employment and investment as part of the wider Freeport programme.	Yellow
Climate Change	Review and implement the Towards Net Zero Plan 2022-2025 ; publish an internal asset carbon emissions data dashboard and submit our carbon emissions report to WG by September 2024	The Council's work towards Net Zero remains on track. The Net Zero PowerBI Dashboard is now live on the internal MonITor system for staff and councillor use. The Council submitted its annual carbon emissions report to Welsh Government.	Green

Strategic Objective	Key Action	Update	Status
Climate Change	Progress the Fleet Transformation Plan by increasing the number of low carbon vehicles in the fleet by 13 (dependent on capital and grant funding)	The Council continues to modernise its vehicle fleet, with 31 electric vehicles now in use. Procurement savings have been achieved through Welsh Government collaboration, helping reduce emissions and running costs across services.	Green
Climate Change	Adopt the new Local Development Plan (LDP) Delivery Agreement – present to full Council and submit to WG for agreement	The Council's updated Delivery Agreement for the Local Development Plan has been approved by Welsh Government. Work is ongoing to strengthen the evidence base to ensure future planning policy remains robust and aligned to local needs.	Green
Climate Change	Install low carbon heating systems in nine council buildings	The Council is investing in low-carbon heating across nine buildings as part of its Net Zero programme. Technical upgrades and testing are underway, with a further £781,000 of Welsh Government funding secured to expand solar infrastructure and improve energy efficiency.	Green
Climate Change	Work towards achieving the Welsh Government target to recycle 70% of household waste and waste from council buildings	The Council achieved a household recycling rate of 66% during the year. Continued work is underway to reach the Welsh Government target of 70%. Council buildings all, including schools, now have recycling bins in place. The council have recycled 47% on average during 2024/25. This is currently in line with expectations and will improve as their use increases.	Red
Climate Change	Work with our partners to progress the key objectives of the Resources and Recycling Strategic Plan to improve our waste and recycling collection service	The Council continues to deliver its Resources and Recycling Strategic Plan , focusing on improving recycling rates and reducing residual waste. Additional staff have been appointed to support this work, and options for enhancing the collection service are being developed for future consideration.	Yellow
Climate Change	Ensure committees are able to give consideration to climate change and biodiversity when making a decision by updating the reporting templates	The Council is strengthening its governance arrangements to ensure climate change and biodiversity are considered in all decisions.	Yellow

Strategic Objective	Key Action	Update	Status
		An updated Scrutiny committee template now includes a specific question on the Council's Net Zero target..	
Climate Change	Implement flood control plans across the island (dependent on WG funding): • deliver six small scale schemes • develop business cases for four large scale schemes	The Council continues to progress flood risk management projects across the island. Design and business case work is underway for both small and large-scale schemes, including in Llanfair PG, Menai Bridge, Llangefni, Benllech, Amlwch and Holyhead, subject to Welsh Government funding.	Yellow
Climate Change	Adopt and publish a local flood risk management strategy	The Council has approved a new Flood Risk Management Strategic Plan following a public consultation to gather feedback from residents and partners.	Green
Climate Change	Implementing active travel plans at Amlwch and Holy Island, as well as infrastructure improvements between Malltraeth and Llanfairpwll	The Council continues to deliver improvements to walking and cycling routes across Anglesey. Work between Marquis Bridge and Malltraeth has started, with further improvements planned towards Newborough, Amlwch and Holy Island in partnership with Transport for Wales and Welsh Government.	Yellow
Climate Change	Appoint an EV charging point supplier to complete preparation works and install up to 23 public EV charging points across the island (dependent appointing a suitable supplier)	The Council has secured £500,000 of grant funding to deliver up to 23 public electric vehicle charging points across the island. Site preparation work is progressing well, with several installations due to be completed later in 2025 through the new Welsh Government EV Infrastructure Framework.	Yellow

ISLE OF ANGLESEY COUNTY COUNCIL	
Report to:	EXECUTIVE COMMITTEE
Date:	24 NOVEMBER 2025
Subject:	REVENUE BUDGET MONITORING, QUARTER 2 2025/26
Portfolio Holder(s):	ROBIN WILLIAMS – DEPUTY LEADER & PORTFOLIO HOLDER – FINANCE & CORPORATE BUSINESS AND CUSTOMER EXPERIENCE
Head of Service / Director:	MARC JONES – DIRECTOR OF FUNCTION (RESOURCES) / SECTION 151 OFFICER
Report Author:	BETHAN HUGHES OWEN – ACCOUNTANCY SERVICES MANAGER
Tel:	01248 752663
E-mail:	BETHANOWEN2@YNYSMON.LLYW.CYMRU
Local Members:	n/a
A – Recommendation/s and reason/s	
Recommendations (i) To note the position set out in Appendices A, B and C in respect of the Authority's financial performance to date and expected outturn for 2025/26; (ii) To note the summary of Contingency budgets for 2025/26, detailed in Appendix CH; (iii) To note the monitoring of agency and consultancy costs for 2025/26 in Appendices D and DD. Reason The overall forecasted position at the end of the second quarter indicates that the final position will result in an underspend on the revenue budget of £1,707k (0.88%). This report sets out the financial performance of the Council's services at the end of quarter 2, 30 September 2025. The projected position for the year as a whole is also summarised. It should be noted that predicting the final year-end position at the end of quarter 2 is difficult especially with the winter period facing the Council. The position can change considerably as we move through the remainder of the financial year. There are key areas that are difficult to predict and forecast so far ahead, the key areas being:- 1. A change in the requests for demand led services, mainly the placement of children in care, demand for adult services, homelessness, school transport and out of county education. 2. Additional grant funding received during the year that was not known. 3. Unforeseen one-off expenditure. 4. Recruitment and retention difficulties leading to a higher than anticipated level of vacant posts. 5. Unexpected / Unprecedented weather The forecasted position and other changes will result in the Council ending the financial year with a general balance of £17.414m (8.91% of the 2025/26 net revenue budget), which is £7.642m above the minimum figure recommended to the Council. Given that the forecasted financial position is for an underspend at the end of the financial year, and that the level of general balances is expected to exceed the minimum recommended level, the Executive is not required to approve any remedial action.	
B – What other options did you consider and why did you reject them and/or opt for this option?	
Not applicable – Monitoring Report with no options which require consideration.	

C – Why is this a decision for the Executive?		
Monitoring of the Council's budget is a function that has been delegated to the Executive.		
CH – Is this decision consistent with policy approved by the full Council?		
Yes.		
D – Is this decision within the budget approved by the Council?		
Yes, but any change from the approved budget is noted in the report.		
Dd – Assessing the potential impact (if relevant):		
1	How does this decision impact on our long term needs as an Island?	The report is for monitoring purposes only and is used, along with other reports, to set the medium term financial strategy and annual budget. In setting the annual budget, the impact on the long term needs of the Island will be assessed.
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	Not applicable
3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.	Not applicable
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	The citizens of Anglesey were consulted as part of the 2025/26 budget setting process and will be consulted on future budgets.
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	Not applicable
6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	Not applicable
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.	Not applicable
E - Who did you consult?		What did they say?
1	Chief Executive / Leadership Team (LT) (mandatory)	The members of the LT have been provided with a draft copy of the report prior to this, and any comments received will have been incorporated into the final report.
2	Finance / Section 151 (mandatory)	N/A – this is the Section 151 Officer's report.

3	Legal / Monitoring Officer (mandatory)	The Monitoring Officer is a member of the LT and comments made have been considered.
4	Human Resources (HR)	N/A
5	Property	N/A
6	Information Communication Technology (ICT)	N/A
7	Scrutiny	The financial position at the end of quarter 2 was reviewed by the Finance Scrutiny Panel at its meeting on 6 November 2025.
8	Local Members	N/A
9	Any external bodies / other/s	N/A
F - Appendices:		
• Appendix A - Provisional Revenue Outturn Report for 2025/26 • Appendix B - Table of Provisional Outturn 2025/26 • Appendix C - Analysis of the Forecasted Variance by Service and Reason • Appendix CH - Summary of Contingency Budgets position for 2025/26 • Appendix D - Information regarding monitoring of Agency Staff 2025/26 • Appendix DD - Information regarding monitoring of consultants 2025/26 • Appendix E – Cost of Change 2025/26		
FF - Background papers (please contact the author of the Report for any further information):		
2025/26 Revenue Budget (as recommended by this Committee on 27 February 2025 and adopted by the County Council on 6 March 2025).		

REVENUE BUDGET MONITORING REPORT – QUARTER 2 2025/26

1. APPROVED REVENUE BUDGET 2025/26

1.1 The Council approved a net revenue for 2025/26 as follows:-

Table 1
Approved Budget and Funding for 2025/26

	£'000	£'000
Total Approved Revenue Expenditure		
Amendments to Budget Since Approval	195,442	
Use of Council reserves	(2,459)	
Current Approved Budget for 2025/26 (Net of Reserves)		192,983
Funded By		
Aggregate External Finance (AEF)	135,881	
Standard Council Tax Debit Raised	52,843	
Premium Council tax on Second and Empty Homes	4,259	
Total Funding 2025/26		192,983

2. FORECAST BUDGET POSITION AS AT END OF QUARTER 2 2025/26

2.1 The estimated forecast position at the end of quarter 2 is shown in Table 2, below:-

Table 2
Summary Forecast Financial Position at End of Quarter 2

	2025/26 Budget	Q2 Forecast (Under) / Over	% Variance	Q1 Forecast	Movement
	£'000	£'000	%	(Under) / Over £'000	£'000
Service Budgets	177,593	404	0.23	469	(65)
Corporate Budgets	17,849	(1,055)	(5.91)	(1,073)	18
General Reserves	(2,459)	0	0.00	0	0
Net Revenue Expenditure	192,983	(651)	(0.34)	(604)	(47)
Aggregate External Finance	135,881	0	0.00	0	0
Standard Council Tax	52,843	(565)	(1.07)	(514)	(51)
Council Tax Premium	4,259	(491)	(11.53)	(433)	(58)
Funding	192,983	(1,056)	(0.54)	(947)	(109)
Net Forecast (Under) / Over	0	(1,707)	(0.88)	(1,551)	(156)

2.2 The estimated position for the Council's General Balances is shown in Table 3, below:-

Table 3
Estimated Council General Balances as at 31 March 2026

Executive Meeting	Amount £'m	Purpose
Opening Balance	(18,166)	General reserve at 31 March 2024
Used for Budget 2024/25	2,459	
Forecasted underspend 2025/26	(1,707)	
Revised Council Fund General Balance	(17,414)	

3. FINANCIAL PERFORMANCE BY SERVICE

3.1 The overall combined position for the Council's services shows a forecasted underspend position at the end of the financial year of £1.707m. The analysis by Service is shown in Table 4, below:-

Table 4
Analysis of the Forecasted Budget Position by Service

	(Under) / Overspend £'000	%
Central Education	(231)	(4.51)
Culture	100	6.08
Adult Services	(932)	(2.18)
Childrens' Services	1,350	7.41
Housing	(217)	(10.74)
Planning & Public Protection	317	10.30
Highways	(274)	(3.24)
Council Business	254	11.36
ICT	(263)	(8.18)
Unbudgeted Costs (Insurance, Capital Pension Costs & Bad Debt Provision)	500	
Other Services (Variances under £100k)	(200)	(6.14)
Total Service Variances	404	0.23

3.2 The main reasons for the variances are summarised in Table 5, below, with a more detailed analysis by Service and Sub-Service provided in Appendix C:-

Table 5
Analysis of the Forecasted Variance by Reason

	Forecasted Variance £'000
Cost variances arising from changing demand for services	3,032
Variances in staffing costs arising from vacancies, net of the cost of additional temporary staff and the use of agency staff	(909)
Changes to contract prices not allowed for in the approved budget	(48)
Changes to grant funding which increase or reduce the requirement for funding from the core budget	(539)
Income from fees and charges (above) / below the income target	(1,766)
Cost variances relating to buildings	(286)
Cost variances relating to the employment of external consultants	23
Transfer of funding to / (from) earmarked reserves and general balances	86
Clearly identified errors in the budget setting process	20
Miscellaneous reasons	791
TOTAL FORECASTED VARIANCE	404

3.3 The table above highlights that the main budget pressure that the Council is still experiencing is as a result of an increased demand for services, with £3.032m of budget pressure resulting. The main area of concern is still within Children's Services, with an increase in both the number of children having to be placed with out of county providers and the cost of each placement increasing. The overspend forecast at quarter 2 is £1.462m. Out of county education has seen the forecast for underspend continue however it is a demand led budget and I can change quickly. The position in respect of Adult Services overall has stabilised, however, there are various compensating over and underspends within the budget. The overall budget is currently sufficient to meet the level of demand. The winter period can affect the forecasts depending on the type of winter we experience.

3.4 The financial position is improved due to staff vacancies, where pay costs, net of any additional costs incurred in employing temporary staff and agency staff, is forecast to underspend by £909k, although recruitment issues in the Council's Legal Services has resulted in agency costs being higher than the staffing budget available, with a forecast overspend of £228k. Issues within the Building Regulation Service also resulted in increased staffing costs and demand for service decreasing, the forecast overspend is £250k, although this is lower than the previous forecasted overspend of £363k. Further information on agency costs is provided in paragraph 6 and Appendix D.

3.5 Forecasting income generated through fees and charges is always difficult, however income generation is increasing with the forecast that the income will exceed the budget by £1.766m, with income levels in Leisure and Highways being significantly higher than the income target. Work is ongoing to clear a backlog of financial assessments of social care clients and this has generated additional income above the level of the budget.

4. FINANCIAL PERFORMANCE OF CORPORATE BUDGETS

4.1 The forecasted financial position at the end of the financial year for Corporate Budgets is shown in Table 6, below:-

Table 6
Corporate Budgets Forecasted Financial Position 2025/26

	2025/26 Budget	Q2 Forecast (Under) / Over	Variance	Reason for Variance
	£'000	£'000	%	
Levies	5,276	0	0	
Discretionary Rate Relief	106	69	65.06	
Capital Financing	4,637	(1,022)	(22.05)	Lower borrowing and higher investment returns
Benefits Granted	7,459	(102)	(1.36)	Lower than anticipated case load
Support Services Contribution by HRA	(840)	0		
Budget Savings to be Achieved	(22)	0		Work still ongoing to achieve the saving
General & Other Contingencies	822	0		
Use of General Reserves	(2,459)	(2,459)		
TOTAL	14,979	(3,514)	(6.86)	

5. COLLECTION OF COUNCIL TAX

5.1 The Council Tax Collection Fund budget is determined using the estimated collectable debt for the current year only, based on the tax base figure set in November 2024. It does not provide for arrears collected from previous years, adjustments to liabilities arising from previous years (exemptions, single person discounts, transfers to business rates etc.), changes to the current year's tax-base or the provision for bad and doubtful debts. These changes cannot be estimated when the budget is set and, invariably, lead to a difference between the final balance on the Council Tax Collection Fund and the original budget. Historically, the forecasted levels of Council Tax fall during the year as recovery action is undertaken and taxpayers come forward to claim exemptions and discounts that they are entitled to. The current core Council Tax income is forecasted to be £565k above the budget.

5.2 The Council Tax premium is designed to encourage owners of empty properties and second homes to return the property to general use and, as such, there is a risk that the number of properties paying the premium can reduce significantly during the year. In order to mitigate this risk, the tax base for premium properties is set at 80% and, if the numbers of properties paying the premium does not fall significantly, then the budget will generate a surplus. The change in the eligibility rules for business rates on self catering accommodation has resulted in a number of properties being transferred back from business rates to Council Tax, which has increased properties subject to the second home premium. As a result, the Council Tax premium budget is forecasting a surplus of £491k at the end of the financial year. However, there is a significant risk that appeals will be decided in 2025/26 relating to self catering properties that were transferred from business rates to Council Tax in 2024/25. In order to offset this risk, £900k has also been placed in an earmarked reserve at the end of the 2024/25 financial year, which will be utilised to repay any conclusions to the appeals process.

6. CONTINGENCY BUDGETS

6.1 The original contingency budgets totalled £586k, which included a grant of £2m in respect of employer national insurance contributions. The net of virements to service budgets and transfers in from earmarked reserves has increased the budget to £3.233m at the end of quarter 2 (excluding the national insurance grant). Of these contingency budgets, £1.233m is committed. A full breakdown is attached in Appendix Ch.

7. AGENCY AND CONSULTANCY COSTS

7.1 During the year to date, £746k was spent on Agency staff. These were funded from staffing budgets as they related to staff vacancies. The Waste Service spent £197k for site agents at the recycling centres. The full details can be seen at Appendix D.

7.2 A total of £555k was spent on Consultancy during the period April to September 2025, with £345k funded through grant or external sources. A full summary of expenditure per service, and additional details of the expenditure, can be seen at Appendix DD.

8. COST OF CHANGE FUND

8.1 To date, £72k has been spent on individual projects that were to be funded from the Cost of Change Fund, with £26k spent during 2025/26. Five projects were agreed upon in 2024/25, with a total budget for the projects being £107k. The full details can be seen at Appendix E.

9. CONCLUSIONS

9.1 The forecasted year end position as at the end of the second quarter is that the overall budget will be underspent by £1.707m for the year ending 31 March 2026. Forecasting accurately the financial position at this early stage is always difficult, and it is likely that the position will change as services deal with issues and service demands during the year especially with the winter period ahead.

9.2 The main areas that have yet to be finalised relate to:-

- i. The pay award for both non-teaching staff (from April 2024) were agreed in July 2025. The provision made in the budget for the pay award for non-teaching staff has been calculated and it was sufficient to meet the agreed pay award of 3.20%. £659k was removed from the services and has been taken to the earmarked reserve to cover future inflationary pressures.
- ii. A 4% pay award has been awarded for Teachers for the 2025/26 Academic Year. This is higher than was allowed for in the local government settlement. As in previous years, Welsh Government have released grant funding to cover the difference. Taking consideration of the NJC and Teachers Pay Award and the additional grant funding, the result is cost neutral to the Authority.

9.3 The position in respect of Social Care is of particular concern, with a forecast overspend of £1.350m for Children's Services. The forecast is based on the current level of demand, but demand fluctuates during the year and can change significantly, e.g. one placement for a high dependency client with specialised care needs can amount to between £250k and £500k. Any increase in the demand for services will only worsen the position.

As we move through the remainder of the financial year, the impacts of the above will be factored into future monitoring reports as things become clearer.

- 9.4** The financial position in 2025/26 will also influence the Council's financial strategy for 2026/27 and beyond, as it will highlight the need to realign budgets to reflect the increases in costs seen in 2025/26 and to reflect the changing demand for services. Any significant overspending will also result in an erosion of the Council's earmarked reserves and general balances, and this will reduce the ability to use reserves and balances to help to balance the revenue budget in 2026/27.

APPENDIX B

PROJECTED REVENUE OUTTURN FOR THE FINANCIAL YEAR ENDING 31 MARCH 2026 – QUARTER 2

Gwasanaeth/Swyddogaeth Service/Function	2025/26 Cyllideb Blynnyddol Annual Budget	2025/26 Ch2 Cyllideb hyd yma Q2 Budget Year to Date	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	2025/26 Ch2 Amrywiad Q2 Variance	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	Ch2 : Q2 Amcangyfrif Gwariant i 31 Mawrth 2026 Estimated Expenditure to 31 March 2026	Ch2 : Q2 Amcangyfrif o Alldro 31 Mawrth 2026 gor/(tan) wariant Estimated Outturn 31 March 2026 over/(under)	2025/26 Gor/(tan) wariant fel % o'r Gyllideb Gyfan Projected Over /(Under)spend as a % of Total Budget	2024/25 Gor/(Tan) Wariant Over/(Under)spend
	£'000	£'000	£'000	£'000	%	£'000	£'000	%	£'000
<u>Addysg, Sgiliau a Phobl Ifanc</u> <u>Education, Skills and Young</u> <u>People</u>									
Cyllideb Datganoledig Ysgolion <i>Delegated Schools Budget</i>	64,478	34,303	34,303	0	0.00	64,478	0	0.00	0
Addysg Canolog <i>Central Education</i>	5,123	(3,201)	(3,943)	(742)	(23.19)	4,892	(231)	(4.51)	(3,731)
Diwylliant <i>Culture</i>	1,646	752	738	(14)	(1.94)	1,746	100	6.08	(331)
<u>Gwasanaethau Oedolion</u> <u>Adult Services</u>	42,759	21,649	21,707	58	0.27	41,827	(932)	(2.18)	(2,704)
<u>Gwasanaethau Plant</u> <u>Children's Services</u>	17,544	10,647	11,349	702	6.59	18,894	1,350	7.69	527
<u>Tai</u> <u>Housing</u>	2,020	1,485	1,375	(110)	(7.43)	1,803	(217)	(10.74)	(525)

Gwasanaeth/Swyddogaeth Service/Function	2025/26 Cyllideb Blynnyddol Annual Budget	2025/26 Ch2 Cyllideb hyd yma Q2 Budget Year to Date	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	2025/26 Ch2 Amrywiad Q2 Variance	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	Ch2 : Q2 Amcangyfrif Gwariant i 31 Mawrth 2026 Estimated Expenditure to 31 March 2026	Ch2 : Q2 Amcangyfrif o Alldro 31 Mawrth 2026 gor/(tan) wariant Estimated Outturn 31 March 2026 over/(under)	2025/26 Gor/(tan) wariant fel % o'r Gyllideb Gyfan Projected Over /(Under)spend as a % of Total Budget	2024/25 Gor/(Tan) Wariant Over/(Under)spend
<u>Priffyrdd, Eiddo a Gwastraff</u> <u>Highways, Property & Waste</u>									
Priffyrdd Highways	8,450	4,796	4,622	(174)	(3.63)	8,176	(274)	(3.24)	(1,316)
Eiddo Property	1,814	300	101	(199)	(66.19)	1,718	(96)	(5.29)	1,447
Gwastraff Waste	10,379	4,714	4,792	78	5.36%	10,404	25	0.24	(380)
<u>Rheoleiddio a Datblygu Economaidd</u> <u>Regulation & Economic Development</u>									
Datblygu Economaidd Economic Development	3,042	1,735	2,006	271	15.63	2,951	(91)	(2.99)	(1,576)
Cynllunio a Gwarchod y Cyhoedd Planning and Public Protection	3,079	1,834	2,012	178	9.71	3,396	317	10.30	(996)
<u>Trawsnewid</u> <u>Transformation</u>									
Adnoddau Dynol Human Resources	1,521	745	712	(33)	(4.39%)	1,514	(7)	(0.46)	1,440
TGCh ICT	5,072	3,257	2,857	(400)	(12.28)	4,809	(263)	(5.19)	3,782
Trawsnewid Corfforaethol Corporate Transformation	1,199	552	549	(3)	(0.44)	1,195	(4)	(0.33)	1,076

Gwasanaeth/Swyddogaeth Service/Function	2025/26 Cyllideb Blynyddol Annual Budget	2025/26 Ch2 Cyllideb hyd yma Q2 Budget Year to Date	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	2025/26 Ch2 Amrywiad Q2 Variance	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	Ch2 : Q2 Amcangyfrif Gwariant i 31 Mawrth 2026 Estimated Expenditure to 31 March 2026	Ch2 : Q2 Amcangyfrif o Alldro 31 Mawrth 2026 gor/(tan) wariant Estimated Outturn 31 March 2026 over/(under)	2025/26 Gor/(tan) wariant fel % o'r Gyllideb Gyfan Projected Over /(Under)spend as a % of Total Budget	2024/25 Gor/(Tan) Wariant Over/(Under)spend
<u>Adnoddau Resources</u>	4,136	2,257	2,340	83	3.67%	4,141	5	0.12	2,123
<u>Busnes y Cyngor Council Business</u>	2,236	1,137	1,428	291	25.63	2,490	254	11.36	1,930
<u>Costau Corfforaethol a Democrataidd Corporate & Democratic costs</u>	2,223	1,475	1,540	65	(4.37)	2,196	(27)	(1.21)	(2,624)
<u>Rheolaeth Corfforaethol Corporate Management</u>	873	437	421	(16)	(3.68)	868	(5)	(0.57)	740
Costau heb gyllideb ac na ellir eu rheoli: yswiriant, costau pensiwn a dileu drwg ddyledion / lwfansau amhariad ar incwm gwasanaethau <i>Unbudgeted, uncontrollable costs: insurances, pension costs and bad debt write offs / impairment allowances on services' income</i>						500	500	0.00	
Cyfanswm Cyllidebau Gwasanaethau Total Service Budgets	177,593	88,874	88,909	35	(0.04)	177,996	404	0.23	(1,118)
Ardollau Levies	5,277	5,280	5,280	0	0.0%	5,277	0	0.00	(1)

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Gwasanaeth/Swyddogaeth Service/Function	2025/26 Cyllideb Blynnyddol Annual Budget	2025/26 Ch2 Cyllideb hyd yma Q2 Budget Year to Date	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	2025/26 Ch2 Amrywiad Q2 Variance	2025/26 Ch2 Gwir Wariant ac Ymrwymadau Q2 Actual & Committed Spend	Ch2 : Q2 Amcangyfrif Gwariant i 31 Mawrth 2026 Estimated Expenditure to 31 March 2026	Ch2 : Q2 Amcangyfrif o Alldro 31 Mawrth 2026 gor/(tan) wariant Estimated Outturn 31 March 2026 over/(under)	2025/26 Gor/(tan) wariant fel % o'r Gyllideb Gyfan Projected Over /(Under)spend as a % of Total Budget	2024/25 Gor/(Tan) Wariant Over/(Under)spend
<u>Cyllido Funding</u>									
Trethi Annomestig NDR	(25,097)	(12,289)	(13,514)	(1,225)	9.96%	(25,097)	0	0.00	0
Y Dreth Gyngor Council Tax	(52,843)	0	0	0	0.00%	(53,407)	(564)	1.07	393
Premiwm y Dreth Gyngor Council Tax Premium	(4,259)	0	0	0	0.00%	(4,750)	(491)	11.53	(1,354)
Grant Cynnal Refeniw Revenue Support Grant	(110,784)	(59,271)	(61,876)	(2,605)	4.40%	(110,784)	0	0.00	0
Cyfanswm Cyllid 2025/26 Total Funding 2025/26	(192,983)	(71,560)	(75,390)	(3,830)	0	(194,038)	(1,055)	0.55	(961)
Cyfanswm yr alldro, yn cynnwys effaith y cyllido Total outturn, including impact of funding	0	26,649	24,721	(1,928)	7.23%	(1,707)	(1,707)	(0.88)	(3,875)

ANALYSIS OF THE FORECASTED VARIANCE BY SERVICE AND REASON

Service	Sub Service	Variance	Reason for Variance									
			Change in Service Demand	Staff / Agency Variances	Contract or Price Changes	Changes to Grant Funding	Income Variances	Building Costs	Consultancy	Transfer To / (From) Reserves	Budget Over / Under Provision	Misc
		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Central Education	School Transport	(31)	(31)									
	School Meals	(85)	(85)									
	ALN Strategy	(22)		(22)								
	School Exceptions	(38)										(38)
	Language Centre											
	Early Years Provision	(54)	(18)	(12)				(24)				
	Clwb Gofal Plant											
	Further Education	(4)										(4)
	Central Education	(20)										(20)
	Out of County Placements	(107)	(33)		(74)							
	Millbank	13					5	8				
	GWE	(77)		53			(130)					
	SIMS	155										155
	Others	39										39
	TOTAL	(231)	(167)	19	(74)	-	(125)	(16)	-	-	-	132
Culture	Museums & Galleries	100					25	30				45
	Libraries	-10		(31)			21					
	Archives	10					5	5				
	TOTAL	100	.	(31)	-	-	51	35	-	-	-	45
Adult Services	Elderly – Residential	(194)	330				(524)					
	Elderly – Nursing	(251)	210				(461)					
	Elderly – Homecare	(30)	318			(314)	(34)					

Service	Sub Service	Variance	Reason for Variance									
			Change in Service Demand	Staff / Agency Variances	Contract or Price Changes	Changes to Grant Funding	Income Variances	Building Costs	Consultancy	Transfer To / (From) Reserves	Budget Over / Under Provision	Misc
		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Adult Services (continued)	Elderly – Other	(5)	(8)	15		(12)						
	Physical Disability - Residential	310	362				(52)					
	Physical Disability - Homecare	186	117				69					
	Physical Disability - Other	(44)	(1)	(33)		(10)						
	Learning Disability – Residential	(139)	(89)				(50)					
	Learning Disability - Homecare	(23)	(34)				11					
	Learning Disability – Day Care	(36)	(36)									
	Learning Disability – Supported Accommodation	252	146				106					
	Learning Disability - Other	(9)	71	(34)		(20)	(26)					
	Mental Health – Residential	(126)	(190)				64					
	Mental Health – Homecare	(23)	(23)									
	Mental Health – Supported Accommodation	129	99				30					
	Mental Health - Other	(143)	(35)	(72)		(36)						
	Provider Unit – Residential	(162)	(41)	28		(42)	(107)					
	Provider Unit - Homecare	(380)	(49)	(282)		(72)	23					
	Provider Unit – Day Care	(114)	(44)	(70)								
	Provider Unit – Supported Accommodation	13	2	26			(15)					
	Provider Unit - Other	(105)	(38)	(67)								
	Management Support Services	(38)	(50)	12								
	TOTAL	(932)	1,017	(477)	-	(506)	(966)	-	-	-	-	-

Service	Sub Service	Variance	Reason for Variance									
			Change in Service Demand	Staff / Agency Variances	Contract or Price Changes	Changes to Grant Funding	Income Variances	Building Costs	Consultancy	Transfer To / (From) Reserves	Budget Over / Under Provision	Misc
		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Children's Services	Looked After Children – Out County Placements	1,544	1,544									
	Foster Care	135	135									
	Small Group Homes	(452)	(425)	(27)								
	Other Looked After Children	138	138									
	Family Support	90	90									
	Children with Disabilities	(35)	73	(94)			(14)					
	Commissioning & Social Work	(13)	30	(43)								
	Other	(57)	74	(110)		(21)						
	TOTAL	1,350	1,659	(274)	-	(21)	(14)	-	-	-	-	-
Housing	Housing Services	(5)	(10)	(36)								41
	Homelessness	(209)	31				(240)					
	J.E.O'Toole Centre	(3)						(3)				
	TOTAL	(217)	21	(36)	-	-	(240)	(3)	-	-	-	41
	Highways Support and Management	(20)		(20)								
Highways	Môn Community Transport	(52)	(52)									
	Car Parks & Parking Management	(80)					(80)					
	Development Control	(50)					(50)					
	Private Steet Works	(500)					(500)					
	Works Budget	455	455									
	Maintenance & Management	49	49									

Service	Sub Service	Variance	Reason for Variance									
			Change in Service Demand	Staff / Agency Variances	Contract or Price Changes	Changes to Grant Funding	Income Variances	Building Costs	Consultancy	Transfer To / (From) Reserves £'000	Budget Over / Under Provision £'000	Misc
		£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000	£'000
Highways (Continued)	Maintenance Design	(50)					(50)					
	Public Transport	(51)					(51)					
	Other	25	25									
	TOTAL	(274)	477	(20)	-	-	(731)	-	-	-	-	-
Property	Management & Staffing	(98)		(88)								(10)
	Cleaning	26		8								18
	Commercial Property	21					27					(6)
	Council Property	(95)						(95)				
	Architectural Services	50					41					9
	TOTAL	(96)	-	(80)	-	-	68	(95)	-	-	-	11
Waste	Waste Collection & Disposal	50	50									
	Electricity Generating	(50)					(50)					
	Recycling	30					30					
	Waste Sites	15	15									
	Administration & Management	(20)					(20)					
	TOTAL	25	65	-	-	-	(40)	-	-	-	-	-
Economic Develop- ment	Economic Development	43		(15)			67					(9)
	Destination	(23)		(33)			18					(8)
	Leisure	(111)		103			(130)	(207)		30		93
	TOTAL	(91)	-	55	-	-	(45)	(207)	-	30	-	76
Planning	Planning Admin	(2)										(2)
	Planning Control	73					78					(5)
	Building Control	250		122			135					(7)
	Conservation	(67)		(67)								

[illegible]

Service	Sub Service	Variance	Reason for Variance									
		£'000	Change in Service Demand £'000	Staff / Agency Variances £'000	Contract or Price Changes £'000	Changes to Grant Funding £'000	Income Variances £'000	Building Costs £'000	Consultancy £'000	Transfer To / (From) Reserves £'000	Budget Over / Under Provision £'000	Misc £'000
Council Business	Electoral Services	5		5								
	Emergency Planning	(6)										(6)
	Committee Services	(5)		(25)							20	
	Translation	4		4								
	Legal Services	256		228			28					
	TOTAL	254	-	212	-	-	28	-	-	-	20	(6)
Corporate Management	Corporate Management	(5)		(5)								
	TOTAL	(5)	-	(5)	-	-	-	-	-	-	-	-
Corporate & Democratic	Pension Contributions	(30)		(30)								
	Audit Fees	79			26							53
	Coroners	(41)	(40)									(1)
	Apprenticeship Levy	(3)		(3)								
	Members' Expenses & Support	(29)				(1)						(28)
	Corporate Other	(3)										(3)
	TOTAL	(27)	(40)	(33)	26	(1)	-	-	-	-	-	21
Other	Unbudgeted Costs Provision	500										500
	TOTAL	500	-	-	-	-		-	-	-	-	500
	SERVICE TOTAL	404	3,032	(909)	(48)	(539)	(1,766)	(286)	23	86	20	791

SUMMARY OF QUARTER 2 POSITION ON CONTINGENCY BUDGETS

	Original Budget	Virements (to) Service Lines / from Earmarked Reserves	Amended Budget YTD	Committed YTD
	£	£	£	£
General Contingency	394,311	(105,581)	288,730	288,730
Housing Assistance for 1 st Time Buyers	1,000,000	-	1,000,000	1,000,000
Salary and Grading	300,000	(131,515)	168,485	168,485
Other Earmarked	502,839	(32,806)	470,033	470,033
Pay Inflation	49,209	659,055	708,264	708,264
National Insurance Employer Contributions Grant	(2,000,000)	-	(2,000,000)	(2,000,000)
Trainee Scheme	340,000	257,598	597,598	597,598
Total General and other Contingencies	586,359	646,751	1,233,110	1,233,110

AGENCY COSTS APRIL TO SEPTEMBER 2025

Service	Amount £	Source of Funding (Specific Core Budget / Un-utilised staffing budget / Grant / External Contribution)	Permanent / Temporary	Reason for Cover
Economic & Regeneration	41,285	Core Budget	Temporary	To cover vacant post
	12,010	Core Budget	Temporary	Backlog
	53,295			
Schools	29,963	Core Budget	Temporary	Supply
	29,963			
Waste	157,957	Specific Core Budget	Temporary	Specific Tasks on Site
	38,010	Specific Core Budget / External Contribution	Temporary	Specific Tasks on Site
	195,967			
Council Business	205,153	Unutilised Staffing Budget	Temporary	To cover vacant post i.e. 3 Solicitor Posts and 1 Legal Services Manager
	205,153			
Children's Service	80	Core Budget	Temporary	To cover vacant post
	80			
Adult Services	147,135	Core Budget	Temporary	To cover vacant post
	147,135			
Resources	41,483	Core Budget	Temporary	To cover vacant post
	14,280	Core Budget	Temporary	To undertake additional work in respect of housing benefit subsidy claims
	32,606	Core Budget	Temporary	Additional resource to deal with a backlog of unrecovered debts
	4,627	Core Budget	Temporary	Temporary cover for sickness absence
	21,480	Core Budget	Temporary	Temporary recovery agent
	114,476			
Total	746,069			

SUMMARY OF CONSULTANCY EXPENDITURE TO END QUARTER 2 2025/26

Summary Consultancy Expenditure per Service			
Service	Quarter 1 £	Quarter 2 £	Total 2025/26 £
Central Education	2,000	13,150	15,150
Culture			
Economic & Regeneration	214,593	191,795	406,388
Property	375	280	655
Highways	31,215	31,303	62,518
Schools		4,600	4,600
Waste	7,973	7,701	15,674
HRA	34	135	169
Housing		2,475	2,475
Corporate & Democratic			
Adult Services			
Children's Services			
Corporate			
Transformation			
Council Business			
Resources	24,020	23,500	47,520
Total	280,209	274,940	555,149
Funded by:			
Core Budget	68,600	94,017	162,617
Grant	19,064	8,000	27,064
External Contribution	186,390	131,138	317,528
Reserves / Provisions	6,156	41,784	47,940
Total	280,209	274,940	555,149

SUMMARY OF COST OF CHANGE FUND EXPENDITURE TO END QUARTER 2 2025/26

Gwasanaeth / Service	Disgrifiad / Description	Cyllideb / Budget	Gwariant / Expenditure	Cyllideb sy'n cael ei chario ymlaen i 2026/27/ Budget Carried Forward to 2026/27 £	Diweddariad Prosiect / Project Update
Adnoddau Resources	Gweithredu System Telesolutions i gysylltu gyda cwsmeriad y Gwasanaeth Refeniw a Budd-Daliadau / Implement Telesolutions system to contact customers of the Revenue and Benefits Service	4,500	0	4,500	Bydd y gwaith hwn yn dechrau unwaith fydd y prosiect Galw Diogel wedi'i gwblhau / This work will commence once the Call Secure project is completed.
Adnoddau Resources	Cymorth gan Ymgynghorwyr o'r Cwmni Meddalwedd i wneud defnydd llawn o modiwlau ad-ennill dyledion ac i weithredu'r modiwlau bilio blynyddol / Support for Software Company Consultants to make full use of the debt recovery modules and to implement the annual billing modules	21,000	21,000	0	Mae gwaith wedi ei gwblhau ar y modiwlau yma a gwneir taliadau yn ystod yr ail chwarter / Work has now been completed on these modules and payments will be made during the second quarter
Adnoddau Resources	Gweithredu modiwlau ychwanegol yn y System Casglu Incwm / Implement additional modules in the Income Collection System	8,370	8,370	0	Gwaith yn symud ymlaen ar Call Secure cyn symud i'r systemau eraill. Angen cytuno proses i gwsmeriaid wedi derbyn y system brawf. / Work is ongoing on Call Secure before moving to the other systems. Need to agree a process for customers after receiving the test system.

Gwasanaeth / Service	Disgrifiad / Description	Cyllideb / Budget	Gwariant / Expenditure	Cyllideb sy'n cael ei chario ymlaen i 2026/27/ Budget Carried Forward to 2026/27	Diweddariad Prosiect / Project Update
Plant Children	Defnyddio Microsoft Co-Pilot i gofnodi cyfarfodydd achosion yn y Gymraeg a'r Saesneg / <i>Use Microsoft Co-Pilot to Minute Case Conference meetings in both Welsh and English</i>	32,640	5,713	26,927	Mae trwyddedau mewn lle a pholisi AI yn ddrafft gyda fersiwn arfaethedig ar y ffordd. Gweithdy wedi ei gynnal i godi ymwybyddiaeth o'r dechnoleg ac adnabod "use cases". Mae'r gwasanaeth wedi cwblhau templed sydd yn nodi pa ddata sydd am gael ei rannu i ganiatau asesiad effaith / preifatrwydd data. / <i>Licenses are in place and an AI policy is in draft with a proposed version on its way. A workshop has been held to raise awareness of the technology and to identify use cases. The service has completed a template to identify which data will be shared to allow an impact assessment / data privacy.</i>
Priffyrdd, Gwastraff ac Ciddo Highways, Waste and Property	Cynnal adolygiad o drefniadau trafnidiaeth ar draws y Cyngor / <i>Undertake a review of the Council's transport arrangements across the whole Council</i>	40,000	37,357	2,643	Mae ymgynghorwyr wedi eu penodi a'r gwaith wedi dechrau. / <i>Consultants have been appointed and work has commenced.</i>
CYFANSWM / TOTAL		106,510	72,440	34,070	

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ISLE OF ANGLESEY COUNTY COUNCIL		
Report to:	EXECUTIVE	
Date:	25 NOVEMBER 2025	
Subject:	BUDGET MONITORING REPORT SECOND QUARTER 2025/26 - CAPITAL	
Portfolio Holder(s):	ROBIN WILLIAMS – DEPUTY LEADER & PORTFOLIO HOLDER – FINANCE & CORPORATE BUSINESS AND CUSTOMER EXPERIENCE	
Head of Service / Director:	MARC JONES – DIRECTOR OF FUNCTION (RESOURCES) / SECTION 151 OFFICER	
Report Author:	MARC JONES – DIRECTOR OF FUNCTION (RESOURCES) / SECTION 151 OFFICER	
Tel:	01248 762601	
E mail:	rmjfi@ynysmon.gov.wales	
Local Members:	n/a	
A –Recommendation/s and reason/s		
- It is recommended that the Executive note the progress of expenditure and receipts against the capital budget 2025/26 at quarter 2. - Approve the additional schemes, amounting to £3.483m, to the capital programme and amendments to funding, as per Appendix C, which will result in a revised capital budget of £59.669m for 2025/26.		
B – What other options did you consider and why did you reject them and/or opt for this option?		
n/a		
C – Why is this a decision for the Executive?		
- This report sets out the financial performance of the capital budget for the second quarter of the financial year. - Budget monitoring is a designated Executive function.		
CH – Is this decision consistent with policy approved by the full Council?		
Yes		
D – Is this decision within the budget approved by the Council?		
Yes – the Executive approved to authorise the adjustments made to the initial capital budget approved by the Council.		
DD – Assessing the potential impact (if relevant):		
1	How does this decision impact on our long term needs as an Island?	The capital budget funds investments in assets and infrastructure which are required to allow the Council to meet the long term objectives which are set out in its Corporate Plan and Capital Strategy.
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	Some of the individual investments, e.g. flood prevention work, will prevent future costs, whilst others, e.g. ICF projects, will reduce the dependency on the Council to provide more expensive services.

3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom	Funding of the projects have been agreed and planned with other organisations, notably Welsh Government.
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	The Council's Corporate Plan and Capital Programme 2025/26 have been subject to a consultation process with Anglesey citizens.
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	Some of the projects funded by the capital programme do impact on the equalities agenda, e.g. disabled access in schools, disabled facilities grants.
6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	Expenditure on capital projects are designed to improve / maintain the Council's assets and services, which can directly impact on those groups experiencing socio – economic disadvantage.
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.	No impact on the Welsh language.
E - Who did you consult?		What did they say?
1	Chief Executive / Leadership Team (LT) (mandatory)	Report has been reviewed by the LT and comments incorporated into the final report.
2	Finance / Section 151 (mandatory)	N/A – this is the Section 151 Officer's report.
3	Legal / Monitoring Officer (mandatory)	The Monitoring Officer is part of the LT and comments made have been considered.
4	Human Resources (HR)	The Service will have provided input on progress for projects directly under their control.
5	Property	The Service will have provided input on progress for projects directly under their control.
6	Information Communication Technology (ICT)	The Service will have provided input on progress for projects directly under their control.
7	Scrutiny	The position at the end of the quarter was discussed by the Finance Scrutiny Panel at its meeting on 6 November 2025.
8	Local Members	Not applicable
9	Any external bodies / other/s	Not applicable
F - Appendices:		
Appendix A - Capital Budget Monitoring Report – Quarter 2 2025/26		
Appendix B - Summary of the Capital Projects' Expenditure to date against the Capital Budget, and the Projected Expenditure at Year-End		
Appendix C - Changes to budgets / additional schemes added since budget setting		

FF - Background papers (please contact the author of the Report for any further information):

- 2025/26 Capital Budget, as approved by the full Council on 6 March 2025;
- 2025/26 Treasury Management Strategy Statement, approved by the full Council on 6 March 2025;
- 2024/25 Capital Outturn Report, presented to this Committee on 17 July 2025; and
- 2025/26 Budget Monitoring Report – First Quarter, presented to this Committee on 23 September 2025.

1. INTRODUCTION

- 1.1** This is the capital budget monitoring report for the second quarter of the financial year and allows Members to note the progress of capital expenditure and capital receipts against the capital budget.
- 1.2** In March 2025, the Council approved a capital programme for non-housing services of £23.7m for 2025/26, and a capital programme of £20.594m for the Housing Revenue Account (HRA). In addition, in July 2025, the Executive approved capital slippage of £2.529m to be brought forward from 2024/25, bringing the capital programme for non-housing services to £25.929m, and £20.894m for the HRA. Since the budget setting process, there have been additional schemes added onto the programme, most of which are grant funded and some amending of funding, which amounted to £12.846m. This brings the total capital budget for 2025/26 to £59.669m. This is illustrated in the table below:-

Funded By:	Original 2025/26 budget, as approved by full Council £'000	Slippage, as approved in Q4 2024/25 outturn £'000	Additional schemes / amendments since budget setting £'000	TOTAL £'000
Grant	21,960	1,006	12,811	35,777
Supported Borrowing	3,118	696	0	3,814
Unsupported Borrowing	12,068	0	(8,386)	3,682
Revenue Contribution	5,488	300	7,323	13,111
Capital Receipts	500	331	0	831
Reserves	1,160	181	253	1,594
Loan	0	15	845	860
TOTAL	44,294	2,529	12,846	59,669

Please refer to Appendix C for details of changes to budgets / additional schemes added since the budget setting process.

2. PROGRESS ON EXPENDITURE 2025/26

- 2.1** Below is a summary table of the annual budget of the 2025/26 capital programme and how it is funded, along with the capital expenditure to 30 September 2025:-

Service	Annual Budget £'000	Actual Expenditure £'000	Committed Expenditure £'000	Total Expenditure £'000	Annual Budget Spent %
Housing - General Fund	1,099	347	494	841	77
Housing - HRA	24,521	10,149	0	10,149	41
Lifelong Learning	3,571	1,031	93	1,124	31
Economic and Regeneration	11,361	3,968	0	3,968	35
Highways	6,996	1,298	1,406	2,704	39
Waste Management	1,470	0	0	0	0
Property	7,951	161	0	161	2
Transformation	785	91	103	194	25
Adult Services	1,915	435	0	435	23
Total	59,669	17,480	2,096	19,576	33
Funded By:					
Capital Grant	35,777				
Capital Receipts	831				
Supported Borrowing	3,814				
Unsupported Borrowing	3,682				
Revenue Contribution	13,111				
Reserves	1,594				
Loan	860				
Total Funding	59,669				

2.2 27% of the General Fund annual budget has been spent to date. The reason for this is that a number of the capital schemes are weighted towards the latter part of the financial year. Some capital schemes are underway, with others yet to commence, however, their budget is expected to be utilised next quarter or towards the latter part of the financial year (Enable grant, childcare units and the Low Carbon Heat grants). All capital schemes and their associated spend can be seen in Appendix B. There are several capital grants schemes in 2025/26, and an update on these is provided in Section 3.1 of this report.

2.3 The Housing Revenue Account (HRA) has spent 41% of the annual budget. For further information on the HRA capital expenditure and projected spend, please refer to the HRA quarter 2 budget monitoring report, presented to this Committee on 25 November 2025.

3. FUNDING

3.1 Capital Grants

3.1.1 There are several Capital Grant schemes in the Capital Programme for 2025/26, most of which are underway and progressing, with a brief update on the schemes provided below:-

- **Holyhead : Culture & Heritage Driven Transformation project (including Townscape Heritage Initiative THI Phase II and UK Government funding)** – This project is making significant progress, with several key developments nearing completion:-
 - Empire Complex: The Play Centre reopened to the public in quarter 2 and the facility is proving very popular. All elements of Holyhead Town Council's projects are now complete.
 - 9 Stanley Street: The project is complete, with the ground floor retail space operational and tenants secured for the residential space above.
 - Central Buildings: Renovation is progressing well, despite unexpected roof replacement delays. Works are scheduled to complete in quarter 3, with the Dance Studio, which will be occupying the first and second floors looking to open in January.
 - Former HSBC Building: Work was delayed due to issues with utility services, but work is now progressing well again, with scheduled completion for May 2026.
 - 2-4 Market Street: The ground floor has been completed, with the tenant now trading successfully.
 - St Cybi's: Construction is ongoing, with completion due in quarter 3, and the building reopening to the public before Christmas. There has been some delay with the installation due to issues with the utility services.
 - Ucheldre Centre: Work on the new build is 80% complete, with the project expected to finish by the end of the year. The Centre has remained operational and open to the public whilst all the works have been undertaken.
 - Townscape Heritage Initiative (THI): The works on the 3 properties receiving grant funding under the THI are progressing well. Works on shop fronts is underway, with one now complete. All projects are due to complete by the end of quarter 4.
 - Additional Funding: Delivery partners have sought more funding to cover rising costs. The overall programme remains on budget and is expected to finish by March 2026 (with the exception of HSBC).

- The final Levelling Up Fund (LUF) payment from UK Government was received in September, bringing the total funding received to date to £17.047m.
- **Small Scale Grants Work** - 8 schemes have been approved for 2025/26 (three construction schemes and five design schemes). Urgent supporting works have been undertaken at Porth Diana prior to the tender being arranged over the Autumn for the works to commence later in the year. Caerneddi and Lôn Trearddur currently with land agents. Designs complete, but nothing done on site yet. Some concern is building around the land / access negotiations for both these sites. The remainder are design only, for improved safety and access at the grillages. Works to be implemented in another financial year. Full spend on all schemes anticipated, provided land negotiations can be completed.
- **Active Travel** - £2.909m of Welsh Government (WG) grant has been secured to increase levels of active travel, improve health & well-being, improve air quality, reduce carbon emissions, connect communities and improve active travel access to employment, education and key services, destinations and public transport:-
 - £0.500m is for core works covering a number of scheme proposals, broken down to pre-scheme development, minor works and monitoring and evaluation activities.
 - £2.409m in relation to Malltraeth to Newborough - Phase 2.

Progress in quarter 2 includes appointing the Principal Contractor and works beginning on site for the Main Scheme Malltraeth - Newborough, and appointment of Contractor to deliver the access works for the Pwll Traeth Bach restoration works. Development work (studies / design) continuing at Benllech, Llanfairpwll, Amlwch and Gaerwen, with design works for minor works (capital) progressing in-house for delivery during the financial year. It is anticipated that the grant funding will be spent in full, a more complete picture will be available at end of quarter 3 when the Main Scheme is nearing completion and the access works for Pwll Traeth Bach will have been completed.

- **Ultra Low Emission Vehicle (ULEV) Transformation Fund (2025/26)** - £0.166m has been awarded to promote electric vehicle charging infrastructure projects, in alignment with WG's EV Charging Strategy. This funding is to facilitate the continuation of delivery of fast charge sites at 4 different sites across the Island. Progress in quarter 2 includes finalising tender documents and arranging translation. Also, finalising the Concession Agreement Contract. These were all done to adhere to the Procurement Act 2023 regulations, and the first of its kind within the County Council against the new rules. Quotation requests reviewed with Scottish Power Energy Networks (SPEN) and preparation of enabling works at c.4-5 sites. It is anticipated that the grant funding will be spent in full.
- **Bus Infrastructure Improvements** - £0.208m has been awarded to undertake detailed design of bus stop improvements at shortlisted locations, which may include re-allocating road space. To undertake construction of 1 bus stop improvement scheme and install RTI (Real Time Information) at rural bus stops. Progress in quarter 2 includes appointing a contractor to undertake topographical surveys and begin outline designs for multiple bus stop locations across the Island. Discussions are ongoing with Transport for Wales (TfW) and Journeo with regards to rolling out QR Codes that can access RTI – there is a risk on being able to fully deliver this element of the grant. It is anticipated that the grant funding will be spent in full, a more comprehensive picture will be available at end of quarter 3 following conclusion of discussions with TfW on how to roll-out the QR Codes with RTI access.
- **Plas Arthur (Shared Prosperity Fund - SPF)** - £0.350m grant funding has been secured to contribute to a wider project at Plas Arthur and will be utilised this financial year in relation to the design of the new development and construction / building costs.

- **Low Carbon Heat Grant (4 grants)** – Funding has been awarded across four separate grants to the value of £15.7m. All four now have a completion date of financial year 2025/26. WG Energy Service is providing grant funding that covers 90% of the costs, and the Council is providing match funding for the remaining 10% from existing capital budgets. The works relate to the installation of air source heat pumps and building energy efficiency works at 27 sites.

Five sites completed and commissioned to date, with work at other sites progressing. Electrical work completed in most locations, pending electrical supply upgrades before the new systems can be commissioned. Building fabric work (predominantly the installation of windows and doors) has been completed at most sites. Work is on track to be completed by March 2026.

- **Additional Learning Needs (ALN) grant (2025/26)** - £0.476m of grant funding has been awarded by WG in 2025/26 to support learners with ALN. The aim of the grant is to optimise learning environments for disabled children and young people, and those with additional learning needs, to increase accessibility, promote inclusive practice, support learning and pupil wellbeing. This will support the objectives of ALNET (ALN & Education Tribunal) and ALN reform, to create a unified bilingual system for supporting children and young people from 0 to 25 with ALN, and the delivery of the Curriculum for Wales in school settings. With the projects that are currently in the programme for delivery under this grant, full spend is expected.
- **Community Focused Schools (CFS) grant (2025/26)** - £0.209m has been awarded to support small and medium scale practical projects to open schools outside the traditional hours, specifically to safely adapt and effectively open schools outside traditional hours to enable community use of the existing facilities. Further funding may be required following feasibility study, and WG has been notified and may be accommodating depending on the submission of the detail of specific areas of cost increases. Full expenditure of the budget expected.
- **Play Spaces capital funding** - £0.111m of grant funding has been awarded to respond to shortfalls identified within the Local Authority's Play Sufficiency Assessment 2025, in line with the All Wales Play Opportunities Grant capital funding for play spaces and playgrounds 2025-26 guidance for local authorities. The funding allows the flexibility to purchase large scale items to improve the quality of play spaces, refurbish playgrounds and, also, to support the creation of inclusive and accessible play spaces. Full expenditure is expected.
- **Transforming Towns Programme for Amlwch Marine Terminal Project** - £0.920m of grant funding has been awarded to support the refurbishment of Amlwch Marine Terminal building and bring it back into use, including construction costs and professional fees. The funding relates to September 2025 to March 2027, and £0.440m is expected to be spent in 2025/26, in line with the payment profile.
- **Transforming Towns Programme for Ynys Mon Placemaking Grant** - £0.294m of grant funding has been awarded to support the regeneration of Amlwch, Llangefni and Beaumaris, and green infrastructure improvements to Dingle Green, Llangefni which contribute to the WG's Transforming Towns Programme. Full expenditure is expected.
- Social care funding has been awarded from the Regional Partnership Board from a number of different funding streams, as follows:-
 - **Integrated Care Fund (ICF)** - £0.118m was claimed through the ICF in prior years, and through displaced funding, for the projects to slip into 2025/26 to be completed. It is currently envisaged that the remaining funds will be spent in full this financial year, which will be used as a contribution to schemes that sit within the HRA budget.

○ **Integration and rebalancing capital fund (IRCF)**

- Canolfan Glanhwfa (£0.777m) – The funding is being used to transform a historic chapel / building close to the centre of Llangefni into Anglesey's first dementia centre. The chapel space has been completed. Structural work has commenced at the rear of the building to build the lift shaft. The timetable for the structural work is:-

August / September: Closing the rear of the building for scaffolding installation to support lift shaft construction.

October: Lift installation.

November: Plastering and painting around the lift area, followed by reopening the rear of the building.

£0.177m was drawn down in financial year 2024/25, with a remaining budget of £0.6m for the 2025/26 financial year, with the budget anticipated to be spent in full.

3.2 Capital Receipts

3.2.1 The capital receipts for this year to date and the budgeted capital receipts are:-

	Budget 2025/26 £'000	Received to 30 September 2025 £'000	Projection to 31 March 2026 £'000
Council Fund:			
Smallholdings	0	0	0
General	155	67	222
Industrial	238	0	238
Schools	554	0	554
HRA	123	0	123
Total	1,070	67	1,137

3.2.2 The projected capital receipts at 31 March 2026 is £1.137m, with £0.067m being received as at 30 September 2025 (6%).

3.2.3 Although the projected capital receipts are £1.137m, there are £3.753m of capital receipts available to fund the capital programme, as £2.616m of capital receipts were brought forward from 2024/25, which are currently held in the capital receipts reserve. Not all of this figure will be available to fund the general fund capital programme as there will be funding earmarked to fund the Sustainable Communities for Learning programme, as part of the Council's match funding, as well as Leisure earmarked reserve to fund leisure improvements, HRA capital receipts, as well as funding earmarked for slippage schemes from previous year.

4. PROJECTED ACTUAL EXPENDITURE 2025/26

4.1 Below is a table with projected Expenditure at 31 March 2026 and the revised funding:-

Service	Annual Budget £'000	Projected Expenditure £'000	Projected (Under) / Over Expenditure £'000	Variance %
Housing General Fund	1,099	1,099	0	0
Housing HRA	24,521	22,056	(2,465)	(10)
Lifelong Learning	3,571	3,571	0	0
Economic and Regeneration	11,361	10,881	(480)	(4)
Highways	6,996	6,996	0	0
Waste Management	1,470	865	(605)	(41)
Property	7,951	7,154	(797)	(10)
Transformation	785	630	(155)	(20)
Adult Services	1,915	1,915	0	0
Total	59,669	55,167	(4,502)	(8)
Funded By:	Annual Budget £'000	Projected Funding £'000	Variance £'000	Variance %
Capital Grant	35,777	34,692	(1,085)	(3)
Capital Receipts	831	497	(334)	(40)
Supported Borrowing	3,814	3,797	(17)	(0)
Unsupported Borrowing	3,682	1,445	(2,237)	(61)
Revenue Contribution	13,111	12,883	(228)	(2)
Reserves	1,594	993	(601)	(38)
Loan	860	860	0	0
Total Funding	59,669	55,167	(4,502)	(8)

4.2 As can be seen from Table 4.1, above, the forecast underspend on the capital programme for 2025/26 is £4.502m, with this being potential slippage into the 2026/27 capital programme. The funding for this slippage will also slip into 2026/27 and will be factored in when producing the Treasury Management Strategy Statement, Capital Strategy and Capital Programme for 2026/27.

The significant underspend forecast in the general fund capital programme is summarised below:-

Waste Management

The service is in the process of organising quotes for most equipment required, and free trials on one or two machines to see if they are suitable for the work. Depending on the outcome of this, orders can then be placed, however, it is envisaged that focusing on the priority items this financial year might result in an underspend on the budget.

Property

The Upgrade of Public Conveniences scheme budget will not be spent in full; expenditure is dependent on the outcome of an application for SPF funding. If the application is successful, match funding of approximately £0.045m will be needed from this budget over the 2025/26 and 2026/27 financial years.

In recent years, this budget has been used to provide match funding for WG's Brilliant Basics grant programme, which funds 80% of eligible costs. There is no Brilliant Basics Programme in 2025/26, but the Council is hopeful that the programme will run in future years and that the underspent budget will be available to support Brilliant Basics and other grant applications. It is not considered prudent to commit this budget to wholly Council funded projects this year, when there is the prospect of using it to deliver 80% grant funded projects in future.

The budget allocated to the improvement works at Plas Arthur will not be spent in full this financial year. There is £0.350m of SPF funding secured to contribute to these works (see paragraph 3.1.1 above), and this funding will be prioritised and utilised in full this financial year, with the underspend to be carried forward to 2026/27 to continue the works. The budget for Menai Bridge Library will not be undertaken in 2025/26 due to other more pressing priorities.

Transformation

Significant investment has been made in upgrading IT assets in schools using WG funding (HWB). It will be necessary for the Council to fund the replacement of these assets when they reach the end of their useful lives. Funds are allocated, when available, to build up a reserve to fund the significant expenditure, over £2m, which will be necessary in 2027/28. £0.150m has been allocated to fund the replacement cost of IT devices and infrastructure in schools and, although no expenditure is planned, this funding will be secured for the future by transferring to an earmarked reserve.

- 4.3** The Capital Finance Requirement (CFR) forecasted as at 31 March 2026 is £156.928m, which is the underlying need for the Authority to borrow to be able to fund its Capital Programme. The external borrowing currently stands at £121.895m, meaning the Authority, essentially, needs to borrow £35.033m to fund the current Capital Programme. If this borrowing is undertaken externally, the Authority will still be within its authorised borrowing limits, as per the 2025/26 Treasury Management Strategy Statement (Appendix 11).

5. FUTURE YEARS

- 5.1** The Capital Strategy recommended that the 2025/26 Capital Programme funding will be limited to the total of the general capital grant and supported borrowing (as determined by WG) and estimated value of any capital receipts that will be received. It is expected that the 2026/27 capital programme will follow the same principles, with the general capital grant and supported borrowing used to fund the annual replacement of vehicles, investment in ICT, refurbishing existing assets and an annual allocation to meet the cost of statutory Disabled Facilities Grants. There will also be funding available for the resurfacing of roads and capital projects that attract external grants, and these will be evaluated on a case-by-case basis.

Once the above projects have been funded, any surplus funding available will be used to fund new capital schemes, with priority given to projects which contribute to the Council's objectives, as set out in the Council Plan 2022– 2027, and any schemes which can generate future revenue savings or generate additional income.

6. CONCLUSION

- 6.1** The results at the end of quarter 2, and the associated projected expenditure, show that the majority of projects are on target to be completed within budget. While some schemes are expected to underspend at this stage, it must be noted that the budgets are committed and required, and slippage to 2026/27 is requested for these schemes to complete next financial year. The Council is also expecting to receive £1.137m of capital receipts in 2025/26 to contribute towards the funding of the Capital Programme.

Summary of the Capital Projects' Expenditure to date against the Capital Budget and the Projected Expenditure at Year-End

Service	Annual Budget (£)	Actual Expenditure (£)	Committed Expenditure (£)	Total Expenditure (£)	Annual Budget Spent (%)	Projected Expenditure (£)	Projected Under / Over (£)	Variance (%)
Housing General Fund								
Disabled Facilities Grants	870,000	330,323	494,422	824,746	95	870,000	0	0
Enable Grant	198,030	16,918	0	16,918	9	198,030	0	0
Affordable Housing	30,650	0	0	0	0	30,650	0	0
TOTAL	1,098,680	347,241	494,422	841,663	77	1,098,680	0	0
Housing HRA								
Central Heating Contract	200,000	89,190	0	89,190	45	104,000	(96,000)	(48)
Planned Maintenance Contract	3,000,000	780,807	0	780,807	26	2,000,000	(1,000,000)	(33)
Energy Performance Improvement	3,300,000	1,312,253	0	1,312,253	40	3,300,000	0	0
Environmental Works	500,000	9,020	0	9,020	2	300,000	(200,000)	(40)
Acquisition of Existing Properties and Development of new properties	10,387,814	3,853,826	0	3,853,826	37	9,218,671	(1,169,143)	(11)
Public Sector Adaptations	500,000	177,202	0	177,202	35	500,000	0	0
Fire Risk	500,000	199,944	0	199,944	40	500,000	0	0
Fleet	650,000	0	0	0	0	650,000	0	0
WHQS	5,483,000	3,727,053	0	3,727,053	68	5,483,000	0	0
TOTAL	24,520,814	10,149,297	0	10,149,297	41	22,055,671	(2,465,143)	(10)
Long Learning								
Disabled Access in Education Buildings	134,763	51,293	0	51,293	38	134,763	0	0
Refurbish Education Buildings	1,445,509	320,536	3,225	323,761	22	1,445,509	0	0
School Safety	63,294	0	0	0	0	63,294	0	0
External Canopies	1,577	0	0	0	0	1,577	0	0
Refurbishment of Secondary School Toilets	345,000	231,314	595	231,909	67	345,000	0	0
Childcare Capital Grants Scheme	450,311	583	50,114	50,697	11	450,311	0	0
Play Spaces	110,824	0	0	0	0	110,824	0	0
ALN 2025/26	476,154	338,108	2,650	340,758	72	476,154	0	0
CFS 2025/26	208,800	0	11,083	11,083	5	208,800	0	0
Llanfechell Childcare Unit	90,165	48,009	2,541	50,550	56	90,165	0	0
Llangoed Childcare Unit	46,336	11,221	7,365	18,586	40	46,336	0	0
Valley Childcare Unit	25,721	1,479	15,215	16,694	65	25,721	0	0
St Mary's Building works	20,419	20,419	0	20,419	100	20,419	0	0
Commencement of Band B Programme	152,000	7,538	0	7,538	5	152,000	0	0
TOTAL	3,570,873	1,030,501	92,788	1,123,288	31	3,570,873	0	0

APPENDIX B

Service	Annual Budget (£)	Actual Expenditure (£)	Committed Expenditure (£)	Total Expenditure (£)	Annual Budget Spent (%)	Projected Expenditure (£)	Projected Under / Over (£)	Variance (%)
Economic and Regeneration								
Holyhead Leisure Centre - Flooring	3,003	0	0	0	0	3,003	0	0
Holyhead Leisure Centre - Fitness Equipment	140,000	116,920	0	116,920	84	140,000	0	0
Plas Arthur Leisure Centre - Fence	109,350	100,000	0	100,000	91	109,350	0	0
Plas Arthur Leisure Centre - Flooring	56,487	56,487	0	56,487	100	56,487	0	0
CCTV - David Hughes and Amlwch Leisure Centre	50,000	0	0	0	0	50,000	0	0
Tourism Gateway	50,000	0	0	0	0	50,000	0	0
Holyhead Regeneration (THI Phase II)	280,000	195,089	0	195,089	70	280,000	0	0
Economic Development & Environmental Wellbeing	322,543	0	0	0	0	322,543	0	0
Porth y Wrach Slipway – Enforcement Cameras	30,000	0	0	0	0	30,000	0	0
Newry Community Centre	51,287	0	0	0	0	51,287	0	0
Maritime Infrastructure	177,514	0	0	0	0	177,514	0	0
Visitor Infrastructure	376,531	376,531	0	376,531	100	376,531	0	0
Transforming Towns - Amlwch Marine Terminal	920,000	0	0	0	0	440,000	(480,000)	(52)
Transforming Towns - Place Making Grant	293,740	0	0	0	0	293,740	0	0
Levelling Up Fund	8,500,455	3,123,189	0	3,123,189	37	8,500,455	0	0
TOTAL	11,360,910	3,968,216	0	3,968,216	35	10,880,910	(480,000)	(4)
Transport								
Highways								
Vehicles	306,511	50	113,471	113,521	37	306,511	0	0
Gritters	467,108	198,580	155,710	354,290	76	467,108	0	0
Highways Resurfacing	1,700,000	848,040	0	848,040	50	1,700,000	0	0
Flood Relief Schemes (Match Funding)	330,000	0	0	0	0	330,000	0	0
Invest to Save - Vehicles	5,068	0	0	0	0	5,068	0	0
Small scale grants work	518,027	25,281	4,000	29,281	6	518,027	0	0
Active Travel	2,908,979	138,632	1,099,315	1,237,947	43	2,908,979	0	0
Road Safety Capital	165,750	57,870	0	57,870	35	165,750	0	0
Bus Infrastructure	208,000	0	0	0	0	208,000	0	0
ULEV	166,600	29,573	23,673	53,247	32	166,600	0	0
Electric Vehicle Charging Infrastructure	219,577	208	9,734	9,942	5	219,577	0	0
TOTAL	6,995,620	1,298,234	1,405,904	2,704,137	39	6,995,620	0	0

APPENDIX B

Service	Annual Budget (£)	Actual Expenditure (£)	Committed Expenditure (£)	Total Expenditure (£)	Annual Budget Spent (%)	Projected Expenditure (£)	Projected Under / Over (£)	Variance (%)
Waste Management								
IVC Works	7,791	0	0	0	0	7,791	0	0
Waste Projects	1,445,000	0	0	0	0	840,000	(605,000)	(42)
Recycling Equipment	17,333	0	0	0	0	17,333	0	0
TOTAL	1,470,124	0	0	0	0	865,124	(605,000)	(41)
Property								
Refurbish Existing Assets	311,585	55,955	0	55,955	18	311,585	0	0
Refurbishment and Repairs - Council Offices	125,000	341	0	341	0	125,000	0	0
Refurbishment and Repairs - Amlwch Leisure Centre	80,000	5,163	0	5,163	6	80,000	0	0
Refurbishment and Repairs - David Hughes Leisure Centre	46,000	0	0	0	0	46,000	0	0
Refurbishment and Repairs - Plas Arthur Leisure Centre	850,000	17,800	0	17,800	2	350,000	(500,000)	(59)
Refurbishment and Repairs - Menai Bridge Library	17,000	0	0	0	0	0	(17,000)	(100)
Solar Car Ports	844,711	81,983	0	81,983	10	844,711	0	0
Invest To Save Property	15,596	0	0	0	0	15,596	0	0
Low Carbon Heat Grant - Council Offices	23,900	0	0	0	0	23,900	0	0
Low Carbon Heat Grant - 231	376,850	0	0	0	0	376,850	0	0
Low Carbon Heat Grant - 249	1,348,608	0	0	0	0	1,348,608	0	0
Low Carbon Heat Grant - 250	2,643,719	0	0	0	0	2,643,719	0	0
Low Carbon Heat Grant - 251	988,773	0	0	0	0	988,773	0	0
Upgrade Public Conveniences	279,574	0	0	0	0	0	(279,574)	(100)
TOTAL	7,951,316	161,242	0	161,242	2	7,154,742	(796,574)	(10)
Transformation								
ICT	598,085	90,966	102,900	193,866	32	598,085	0	0
Hwb IT	155,000	0	0	0	0	0	(155,000)	(100)
Telephony System	31,776	0	0	0	0	31,776	0	0
TOTAL	784,861	90,966	102,900	193,866	25	629,861	(155,000)	(20)
Adult Services								
Canolfan Glanhwfa	599,644	212,116	0	212,116	35	599,644	0	0
ICF	118,275	0	0	0	0	118,275	0	0
Refurbishment and Repairs - Brwynog	69,000	0	0	0	0	69,000	0	0
Refurbishment and Repairs - Garreglwyd	514,000	92,837	0	92,837	18	514,000	0	0
Refurbishment and Repairs - Haulfre	81,000	1,200	0	1,200	1	81,000	0	0
Refurbishment and Repairs - Plas Crigyll	100,000	100,000	0	100,000	100	100,000	0	0
Refurbishment and Repairs - Plas Mona	83,520	25,470	0	25,470	30	83,520	0	0
Refurbishment and Repairs - Hen Reithordy	35,000	0	0	0	0	35,000	0	0
Refurbishment and Repairs - Gors Felen	315,000	3,363	0	3,363	1	315,000	0	0
TOTAL	1,915,439	434,985	0	434,985	23	1,915,439	0	0
TOTAL	59,668,636	17,480,682	2,096,013	19,576,695	33	55,166,919	(4,501,717)	(8)

Changes to budgets / additional schemes added since budget setting

Scheme	Budget £	FUNDING							
		Grant £	General Capital Grant Reserve £	Capital Receipts Reserve £	Capital Reserve £	Supported borrowing £	Unsupported borrowing £	Revenue Contribution £	Loan £
Solar Car Ports	844,711								844,711
Active Travel Grant 2025/26	2,908,979	2,908,979							
Bus Infrastructure Grant 2025/26	208,000	208,000							
Road Safety Capital Grant 2025/26	165,750	165,750							
ULEV	166,600	166,600							
Community Focused Schools (CFS)	208,800	208,800							
Additional Learning Needs (ALN)	476,154	476,154							
Enable Grant 2025/26	198,030	198,030							
Capital Repairs & Maintenance	571,384	571,384							
Play Spaces Grant 2025/26	110,824	110,824							
Small Scale Grants	518,027	518,027							
Llanfechell Childcare Unit	90,165	90,165							
Llangoed Childcare Unit	46,336	46,336							
Plas Arthur Fence	109,350	109,350							
THI Phase 2	205,000	205,000							
CCTV – David Hughes and Amlwch	50,000	50,000							
Plas Arthur SPF	350,000	350,000							
Funding	0	(112,625)	112,625						
Electric Vehicle and EV Charging Infrastructure	53,764	53,764							
Childcare Capital grants scheme	380,000	380,000							
Transforming Towns - Amlwch Marine Terminal	920,000	920,000							
Transforming Towns - Placemaking Grant 2025/26	293,740	293,740							
St Marys Building works	20,419	20,419							
Holyhead Fitness Equipment	140,000				140,000				
Visitor Infrastructure Grant	182,578	182,578							
HRA - Q2 amendment	1,492,000	2,182,291					(690,291)		
HRA – Q1 amendment	2,134,814	2,506,892					(7,695,571)	7,323,493	
TOTAL	12,845,424	12,810,458	112,625	-	140,000	-	(8,385,862)	7,323,493	844,711

Changes to budgets / additional schemes
added in Q2 - £3.483m

Isle of Anglesey County Council	
Report to:	EXECUTIVE
Date:	25 NOVEMBER 2025
Subject:	HOUSING REVENUE ACCOUNT BUDGET MONITORING, QUARTER 2 2025/26
Portfolio Holder(s):	COUNCILLOR R WILLIAMS – DEPUTY LEADER & PORTFOLIO HOLDER FINANCE & CORPORATE BUSINESS AND CUSTOMER EXPERIENCE COUNCILLOR C JONES – PORTFOLIO HOLDER HOUSING & COMMUNITY SAFETY
Head of Service / Director:	MARC JONES - DIRECTOR OF FUNCTION (RESOURCES) & SECTION 151 OFFICER (EXT. 2601)
Report Author: Tel: Email:	ŠARKA TIMAROVÁ SarkaTimarova@ynysmon.llyw.cymru
Local Members:	N/A
A –Recommendation/s and reason/s	
1. The Executive is requested to note the following:- (i) The position set out in respect of the financial performance of the Housing Revenue Account (HRA) for quarter 2 2025/26. (ii) The forecast outturn for 2025/26. 2. Background (i) The revenue budget was set with a budgeted surplus of £6,291k. (ii) The gross capital budget for 2025/26 is £24,521k. Grant funding budget of £9,173k reduces the net budget to £15,348k. (iii) The combination of both the revenue budget and adjusted capital budget gave a planned budget deficit of £9,057k, of which £6,820k is to be funded from the HRA reserve, with the balance of £2,237k to be funded by external borrowing. (iv) The HRA is 'ringfenced', and its reserves cannot be transferred to the General Fund, nor can General Fund reserves be used to fund the HRA. 3. This report sets out the financial performance of the HRA for the period from 1st April 2025 to 30th September 2025. 4. Overview 4.1 The HRA revenue surplus / deficit at the end of quarter 2 shows an overachievement of £276k compared to the profiled budget. The forecast at year end is an underspend of £404k. More detail is given in sections 5 to 8 below and in Appendix A. 4.2 Capital expenditure has been increased by £1,492k, to £24,521k, and is forecasted to be £2,465k under budget at year end, as explained in section 9 below and in Appendices B and C. Grant income has increased to £9,173k, and is expected to be spent in full. 4.3 The forecast deficit (combining both revenue and capital) is now £6,188k, £2,869k less than the budget.	

5. Income

5.1 At the end of quarter 2, income was £122k below profiled budget. The shortfall on rental income of £156k is partly due to higher-than-expected number of void properties in quarter 1 compared to the budget, and partly due to timing differences of new properties transferring to rentable stock, with some of the timing issues expected to even out as the year progresses. By the end of the financial year, it is forecasted that income will be on budget due to some extraordinary land and fees income expected during the year.

6. Repairs and Maintenance

6.1 At the end of quarter 2, there was an overspend of £37k on repairs and maintenance. This is primarily due to expenditure on vacant dwellings during change of tenancy. During the year, some of these costs will be reassessed and moved against the capital WHQS budget. We are currently forecasting that the budget will be £55k overspent at year end.

6.2 Shared and rechargeable services, which include expenditure on communal and shared areas, grass cutting etc., show £1k underspend. There is currently a mixture of timing differences that should even out during the year. Our forecast of £10k overspend by year end in quarter 1 is reversed in quarter 2, to £51k underspend due to expected reduced costs in Telecare following a switch to a different provider last year.

6.3 Expenditure on operative staff is £164k below the profiled budget at the end of quarter 2, which is due to unfilled vacancies. Overheads and other expenditure is £42k over budget, which is mostly due to cost of hired skips.

7. Supervision and Management Expenditure

7.1 At the end of quarter 2, supervision and management expenditure was £319k below the profiled budget. The main variances relate to timing differences between the budget and actual expenditure for council tax and utilities (heating) and pension costs. The majority of the timing differences should even out during the year; we forecast that unfilled vacancies and a large pension contributions adjustment will lead to about £219k underspend against the budget at year end.

8. Year End Adjustments

8.1 This heading covers items of expenditure (capital financing costs and recharges from the General Fund) that form part of the year end accounting process. At the end of quarter 2, we are forecasting a small overspend of £7k at year end.

9. Capital Expenditure

9.1 The gross capital budget for 2025/26 is £24,403k, the grant funding budget is £9,173k. The grant funding forecast is summarised below:-

Source	Quarter 2 forecast £
Housing with Care Fund (HCF)	568,648
Integrated Care Fund (ICF)	867,637
Transitional Accommodation Capital Programme (TACP)	1,035,665
Social Housing Grant (SHG)	1,235,012
Major Repairs Allowance (MRA)	2,690,000
Optimised Retrofit Programme 2025/26	2,775,712
Total Grant	9,172,674

9.1 Welsh Housing Quality Standard (WHQS) expenditure – The original £4,983k budget allocated the sum of £1,483k to tackle WHQS refusals and capital elements upgraded at

change of tenancy, such as replacement kitchens, bathrooms and re-wiring systems as they reach the end of their life cycles. Void capitalisation to the end of quarter 2 is in the sum of £696k, with further significant capitalisation expected during quarters 3 and 4. The budget also allocated £3,500k towards Year 2 of a 5-year programme for the replacement of kitchens which now exceed 15 years in age. Housing Services report that both appointed contractors continued to perform well during quarter 2, with expenditure in the sum of £3,030k. As and when required, both contractors are also undertaking kitchen renewals and associated WHQS work at change of tenancy. Subject to approval, it is proposed that this programme is allocated further capital funding in the sum of £500k for expenditure during 2025/26.

- 9.2 Fire Risk expenditure** – The £500k budget is planned to be spent on ensuring compliance with the Regulatory Reform Order 2005. Proposed measures will primarily involve replacement 1 hour (FD60) flat fire doors and upgrading fire alarm systems serving blocks of flats. The fire door replacement contract was tendered and awarded during 2024/25, and expenditure at the end of quarter 2 stood at £200k. Subject to the timely delivery of new doors, Housing Services are currently forecasting that this budget will be fully utilised.
- 9.3 Public Sector Adaptations expenditure** – Housing Services expects that demand for medium or large-scale adaptations will remain constant, and the allocated budget of £500k will fund works such as installing stair-lifts, level access showers, ramps and extensions. Actual expenditure at the end of quarter 2 stood at £177k, with a further £212k in confirmed commitment. Housing Services predicts that the budget will be utilised in full during 2025/26.
- 9.4 Energy Performance expenditure** – As previously reported, Housing Services commenced work on a 5-year programme for the longer-term delivery of renewable energy and decarbonisation measures during quarter 4 of 2024/25. The contract, primarily involving the installation of Solar PV systems and Battery Storage across the housing stock, continued positively during quarter 2, and Housing Services have allocated a budget of £3,300k for these energy efficiency improvements during 2025/26. Expenditure at the end of quarter 2 stood at £1.312m. During 2025/26, this programme has secured financial support in the sum of £2,776k via the Welsh Government's Optimised Retrofit Programme. Housing Services expects that the budget will be utilised in full during the current financial year.
- 9.5 Planned Maintenance expenditure** – The total budget allocated for traditional Planned Maintenance work is £3,000k, which includes carried forward commitment on schemes which were awarded and commenced on site during 2024/25. Carried forward commitment primarily involves the continuation of work at Tan y Bryn, Valley, and Morrison Crescent, Holyhead, which reached Practical Completion during quarter 1. Housing Services expect that works at Valley will reach Practical Completion during quarter 3, and aim to tender a further Planned Maintenance Contract involving 20 properties at various locations during quarter 3. Successful award of contract will fully commit the budget for 2025/26. Expenditure at the end of quarter 2 stood at £781k, with a further £842k in confirmed commitment. At the end of quarter 2, the Service estimate that the budget will be £1,000k underspent.
- 9.6 Environmental Works Expenditure** – A total budget of £500k is allocated towards environmental improvements in 2025/26. A proportion of this budget will be utilised to continue with the programmed demolition of certain garages at Llangefni, Moelfre and Amlwch which are no longer viable to maintain. Housing Services confirms that tenders were received and that a contract was awarded for the demolition of these garages during quarter 2. A further tender will be issued during quarter 3 for garages earmarked for demolition in the Holyhead area. Housing Services do not expect any upgrading of treatment plants to incur any significant expenditure during this financial year, and forecasts under expenditure in the sum of £200k.

9.7 Central Heating Contract Expenditure - During quarter 1 2025/26, a contract (CHC226) for replacement boilers awarded during the last financial year reached Practical Completion. Housing Services have allocated a capital budget of £200k for 2025/26, and expenditure inclusive of commitment was in the sum of £104k at the end of quarter 2. There are no plans to award any further major contracts during this financial year, and Housing Services expects that the budget will be £96k underspent at year end.

9.8 Fleet Renewal – The budget allocates the sum of £650k for a rolling programme of renewing the Building Maintenance Unit's vehicular fleet, primarily the van stock utilised by operatives. A total of £357k was committed at the end of quarter 1, with the delivery of 10 new vehicles expected early during quarter 3.

9.9 Acquisition of Existing Properties and Development of new properties - A budget of £9,396k has been allocated to activities which increase the HRA rentable stock:-

- **Projects Completed or Nearing Completion**

In quarter 2, 16 units were added to the lettable stock, bringing the total to 24 units so far. These were newly developed houses at Stad y Bryn in Llanfaethlu, as well as existing properties acquired and refurbished by HRA. New developments at Cae Braenar in Holyhead and at the Newborough Old School Site are progressing and are expected to add 23 and 14 units respectively to the lettable stock during 2025/26.

- **Other Developments**

Two new houses are being developed at Parc Y Coed in Llangefni by an external developer.

- **Collaboration with Social Services**

There are several active projects where HRA collaborates with the Council's Social Services department. The development of the extra care facility in Menai Bridge is experiencing delays, but some works are expected to take place in 2025/26. Additionally, four properties were acquired and are being developed to meet the needs of social services.

- **Acquisitions and Renovations**

The focus in 2025/26 is on renovations of previously acquired properties, with an allocation of £2,370k to fund 15 units to be added to lettable stock during the year, but, due to slippage in works, the full amount will not be spent this financial year.

Five properties were approved for acquisition in quarter 1, and additional 5 properties are being acquired in quarter 2, following an additional allocation of Transitional Accommodation Capital Programme (TACP) grant by the Welsh Government (WG). As the TACP programme is expected to continue into the future, the development team are scoping further opportunities across the Island.

- **New Projects in Initial Stages and Preplanning**

Several projects are in their initial stages, namely developments at Plas Penlan in Llangefni, Maes Mona in Amlwch, and at the old Corn Hir School site in Llangefni. Projects in preplanning stages include development and re-development at Maes William Williams in Amlwch, Tan Y Foel in Llanerchymedd, Ysgol y Parc in Holyhead and Pencraig Mansions in Llangefni. A budget of £300k has been allocated in 2025/26 for work related to scoping the potential of these sites for a future development project; it is forecasted that about £100k will be spent by year end.

All new projects will be assessed financially and approved in accordance with the Council procedures.

10. HRA Balance

- 10.1** The opening balance of the HRA reserve stood at £7,976k. The budget allowed for the use of £6,820k of this balance, leaving the minimum level of reserve balance of £1,155k, as set out in the HRA Business Plan. This equates to 5% of the dwelling rental income budget for 2025/26. As at quarter 2, it is forecasted that the closing balance will be £1,788k.

11. HRA Borrowing

- 11.1** After capital budget and capital grants adjustments, the net revenue / capital deficit budgeted for the year is £9,057k. This was to be funded by £6,820k from the HRA reserve and £2,237k in external borrowing. At quarter 2, the deficit is forecasted to be £6,187k, mainly as a result of underspend of the capital budget. This will be fully funded from the HRA reserve, and no external borrowing will be necessary in this financial year.

B – What other options did you consider and why did you reject them and/or opt for this option?

Not applicable

C – Why is this a decision for the Executive?

This matter is delegated to the Executive.

Ch – Is this decision consistent with policy approved by the full Council?

Yes

D – Is this decision within the budget approved by the Council?

Yes

Dd – Assessing the potential impact (if relevant):

1	How does this decision impact on our long term needs as an Island?	The report is for monitoring purposes only and is used, along with other reports, to set the HRA business plan and annual budget. In setting the annual budget, the impact on the long term needs of the Island will be assessed.
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	Not applicable
3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.	Not applicable
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	The Housing Services regularly consult with their tenants, and the results of those consultations are fed into the business planning process and then on to the annual budget process.
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	Not applicable
6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	Not applicable
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language and on treating the Welsh language no less favourably than the English language.	Not applicable

E – Who did you consult?

What did they say?

1	Chief Executive / Leadership Team (LT) (mandatory)	The report was considered by the LT. Any comments will have been incorporated into the report.
2	Finance / Section 151 (mandatory)	N/A – this is the Section 151 Officer's report.
3	Legal / Monitoring Officer (mandatory)	The Monitoring Officer is a member of the LT and comments will have been considered and incorporated into the report.
4	Human Resources (HR)	N/A
5	Property	N/A
6	Information Communication Technology (ICT)	N/A
7	Procurement	N/A
8	Scrutiny	The results of the HRA quarterly monitoring reports are reported to the Finance Scrutiny Panel.
9	Local Members	N/A
F - Appendices:		
• Appendix A – Revenue expenditure and forecasts to end of quarter 1 2025/26 • Appendix B – Capital expenditure and forecast to end of quarter 1 2025/26 • Appendix C – New Build capital schemes and forecast to end of quarter 1 2025/26		
Ff - Background papers (please contact the author of the Report for any further information):		
• HRA 30 Year Business Plan 2025-2054 (as approved by this Committee in March 2025).		

HOUSING REVENUE ACCOUNT BUDGET 2025/26

	Current budget 2025/26	Profiled budget	Spend / (income) at Q2	Variance at Q2	Year end forecast at Q2	Year end variance	Forecast variance at Q1	Change from Q1 forecast
	£	£	£	£	£	£	£	£
Income								
Rent income	(23,398,090)	(12,354,189)	(12,197,898)	156,291	(23,338,408)	59,682	-	59,682
Service charges	(247,090)	(130,464)	(142,018)	(11,554)	(247,090)	-	(1,709)	1,709
Other income	(270,950)	(195,050)	(217,287)	(22,237)	(330,576)	(59,626)	(7,967)	(51,659)
Income total	(23,916,130)	(12,679,703)	(12,557,204)	122,499	(23,916,074)	56	(9,677)	9,733
Expenditure								
Repairs and Maintenance	4,237,650	2,118,850	2,156,186	37,336	4,293,114	55,464	-	55,464
Responsive repairs			981,229		2,135,031	-	-	-
Planned and cyclical work			95,328		180,425	-	-	-
Vacant dwellings			1,079,629		1,977,657	-	-	-
Shared and rechargeable services	961,950	648,148	646,832	(1,316)	911,217	(50,733)	10,055	(60,788)
Operative employees costs	2,391,820	1,194,416	1,030,256	(164,160)	2,204,469	(187,351)	(64,843)	(122,508)
Overheads and other expenditure	647,990	336,588	378,749	42,161	639,091	(8,899)	(4,513)	(4,386)
Repairs and maintenance total	8,239,410	4,298,002	4,212,023	(85,979)	8,047,890	(191,520)	(59,302)	(132,219)
Supervision and management								
Rent administration	501,530	250,424	236,553	(13,871)	489,058	(12,472)	1,659	(14,132)
Tenant participation and support	914,300	450,206	423,904	(26,302)	884,968	(29,332)	(9,105)	(20,227)
Estate management	768,290	383,706	334,910	(48,796)	730,928	(37,362)	(13,389)	(23,973)
Development	260,190	129,992	139,331	9,339	295,209	35,019	32	34,987
Management and technical staff	1,821,650	883,420	838,329	(45,091)	1,709,113	(112,537)	(19,329)	(40,709)
Business support	1,632,820	817,236	622,839	(194,397)	1,570,012	(62,808)	(27,140)	(88,168)
Supervision and management total	5,898,780	2,914,984	2,595,866	(319,118)	5,679,288	(219,492)	(67,271)	(152,222)
Total operations	(9,777,940)	(5,466,717)	(5,749,315)	(282,598)	(10,188,897)	(410,957)	(136,249)	(274,707)

	Current budget 2025/26	Profiled budget	Spend / (income) at Q2	Variance at Q2	Year end forecast at Q2	Year end variance	Forecast variance at Q1	Change from Q1 forecast
	£	£	£	£	£	£	£	£
Year end adjustments								
Financing costs and bad debt provision	2,618,800	-	7,080	7,080	2,625,880	7,080	-	7,080
Recharge from central services	842,820	-	-	-	842,820	-	-	-
Recharge from housing services	25,130	-	-	-	25,130	-	-	-
Year end adjustments total	3,486,750	-	7,080	7,080	3,493,830	7,080	-	7,080
Total revenue (surplus) / deficit	(6,291,190)	(5,466,717)	(5,742,235)	(275,518)	(6,695,067)	(403,877)	(136,249)	(267,627)
Capital expenditure account								
Capital expenditure	24,520,814	-	10,149,295	-	22,055,671	(2,465,143)	-	-
Capital grants receivable	(9,172,674)	-	-	-	(9,172,674)	-	-	-
Other contributions	-	-	-	-	-	-	-	-
Total capital (surplus) / deficit	15,348,140	-	10,149,295	-	12,882,997	(2,465,143)	-	-
Capital deficit funded by								
Revenue surplus	(6,291,190)	-	-	-	(6,695,067)	(403,877)	-	-
HRA reserve	(6,820,303)	-	-	-	(6,187,930)	632,373	-	-
Unsupported borrowing	(2,236,647)	-	-	-	-	2,236,647	-	-
Total funding of capital expenditure	(15,348,140)	-	-	-	(12,882,997)	2,465,143	-	-
Opening HRA balance	(7,975,679)	-	-	-	(7,975,679)	-	-	-
Net (increase) / decrease in HRA reserve	6,820,303	-	-	-	6,187,930	(632,373)	-	(632,373)
Closing HRA reserve	(1,155,376)	-	-	-	(1,787,749)	(632,373)	-	(632,373)

APPENDIX B

HOUSING REVENUE ACCOUNT CAPITAL BUDGET 2025/26

	Annual Budget 2025/26	Expenditure Q2	Year End Forecast	Year End Variance	Year End Forecast at Q1	Variance in Forecast to Q1
	£	£	£	£	£	£
Central Heating Contract	200,000	89,190	104,000	(96,000)	200,000	(96,000)
Planned Maintenance Contract	3,000,000	780,807	2,000,000	(1,000,000)	3,000,000	(1,000,000)
Energy Performance Improvement	3,300,000	1,312,253	3,300,000	-	3,300,000	-
Environmental Works	500,000	9,020	300,000	(200,000)	500,000	(200,000)
Acquisition of Existing Properties and Development of New Properties	10,387,814	3,853,826	9,218,671	(1,169,143)	9,395,814	(177,143)
Public Sector Adaptations	500,000	177,202	500,000	-	500,000	-
Fire Risk	500,000	199,944	500,000	-	500,000	-
WHQS	1,483,000	696,340	1,483,000	-	1,483,000	-
Kitchen Replacement Programme	4,000,000	3,030,713	4,000,000	-	3,500,000	500,000
Fleet Renewal	650,000	-	650,000	-	650,000	-
Total	24,520,814	10,149,295	22,055,671	(2,465,143)	23,028,814	(973,143)

NEW DEVELOPMENT BUDGET 2025/26

APPENDIX C

Schemes / Projects	Number of additional units	Budget 2025/26 £	Expenditure Q2 £	Year end forecast £	Year end variance £	Year end forecast at Q1 £	Variance in forecast to Q1 £
New build dwellings							
Newborough Old School Site	14	1,427,530	679,690	1,427,530	-	1,427,530	-
Cae Braenar, Caergybi	23	1,535,707	432,215	1,535,707	-	1,535,707	-
Parc Y Coed, Llangejni, Phase 2	2	293,200	183,639	293,200	-	293,200	-
Stad y Bryn, Llanfaethlu	10	562,736	479,360	562,736	-	562,736	-
Plas Alltran, Holyhead	4	-	-	-	-	-	-
Acquisition of existing properties							
Acquisitions	10	2,312,356	657,030	2,312,356	-	1,438,356	874,000
Refurbishment	15	2,370,000	836,142	1,786,142	(583,858)	2,370,000	(583,858)
Collaboration with social services	4	718,648	424,945	701,000	(17,648)	600,648	100,352
Aethwy Extra Care	73	867,637	128,016	500,000	(367,637)	867,637	(367,637)
Projects in pre-development stages		300,000	32,789	100,000	(200,000)	300,000	(200,000)
Total	155	10,387,814	3,853,826	9,218,671	(1,169,143)	9,395,814	(177,143)

Isle of Anglesey County Council																																																													
Report to:	EXECUTIVE																																																												
Date:	25 NOVEMBER 2025																																																												
Subject:	THE COUNCIL TAX BASE FOR 2026/27																																																												
Portfolio Holder(s):	COUNCILLOR ROBIN WILLIAMS – DEPUTY LEADER & PORTFOLIO HOLDER FINANCE, CORPORATE BUSINESS & CUSTOMER EXPERIENCE																																																												
Head of Service / Director:	MARC JONES - DIRECTOR OF FUNCTION (RESOURCES) / SECTION 151 OFFICER																																																												
Report Author: Tel: E-mail:	MARC JONES - DIRECTOR OF FUNCTION (RESOURCES) / SECTION 151 OFFICER 01248 752601 rmjfi@ynysmon.llyw.cymru																																																												
Local Members:	N/A																																																												
A –Recommendation/s and reason/s																																																													
I recommend that the Executive makes the following decisions:- 1. To note the calculation of the Council Tax Base by the Director of Function (Resources) / Section 151 Officer, this will be used by the Welsh Government in the calculation of the Revenue Support Grant for the Isle of Anglesey County Council for the 2026/27 financial year, being 31,705.67 (see Appendix A in respect of the calculation of the Council Tax Base for this purpose – Part E6). 2. That the calculation by the Director of Function (Resources) / Section 151 Officer for the purpose of setting the Council Tax Base for the whole and parts of the area for the year 2026/27 is approved (see Appendix A for the calculation of the tax base – Part E5). 3. That, in accordance with the Local Government Finance Act 1992 and the Local Authorities (Calculation of Council Tax Base) (Wales) Regulations 1995 (SI1995/2561) as amended by SI1999/2935 and the Local Authorities (Calculation of Council Tax Base) and Council Tax (Prescribed Classes of Dwellings) (Wales) (Amendment) Regulations 2004 and the Local Authorities (Calculation of Council Tax Base) (Wales) (Amendment) Regulations 2016, the amounts calculated by Isle of Anglesey County Council as its tax base for the year 2026/27 shall be 33,887.44, and as follows for the parts of the area listed below :-																																																													
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Penmynydd	249.00	Llanfair-yn-Neubwll	596.82
Pentraeth	627.60	Valley	1,077.66
Moelfre	715.20	Bryngwran	369.54
Llanbadrig	736.08	Rhoscolyn	410.32
Llanddyfnan	536.58	Trewalchmai	380.93

REASONS AND BACKGROUND

The calculations have been made in accordance with the Welsh Government Guidelines for Council Tax Dwellings (CT1 v.1.0) 2026/27, based on the number of properties in various bands on the valuation list on 31 October 2025 and summarised by the Authority under Section 22B (7) of the Local Government Finance Act 1992. The calculations take into account discounts, exemptions and premiums as well as changes to the valuation list likely during 2026/27.

The Isle of Anglesey County Council, as the billing authority, is required to calculate the Council Tax Base for its area and different parts of its area, and these amounts must be notified to the precepting and levying bodies by 31 December 2025. This year, the Welsh Government has requested the information for the purpose of setting the Revenue Support Grant by 14 November 2025, and for tax setting purposes (ratified by Executive decision) by 9 January 2026.

The calculations in **Appendix A** are based on discounts of nil being confirmed for Classes A, B and C; the premium of 100% on long term empty homes and a premium of 100% on second homes for 2026/27 are based on the Executive's intentions set out in their meeting on 25 October 2021 to increase the second home premium (subject to ratification by the Executive). The calculations are also based on the full Council decision at its meeting on 11 December 2018, that its current local Council Tax Reduction Scheme would apply for subsequent years unless substantially amended. For 2026/27, only the usual benefit upratings will apply. The Welsh Government is continuing to fully meet the costs of the previous UK national scheme, but costs arising from caseloads and / or increase in Council Tax will fall on local councils.

THE COUNCIL TAX BASE FOR CALCULATING THE REVENUE SUPPORT GRANT

The total band D equivalent discount, before adjusting for the collection rate (and which includes allowance for Ministry of Defence properties), will be used in calculating claims for the Revenue Support Grant (RSG) for 2026/27. This total, which is used in calculating the RSG, excludes adjustments for premiums and discounts granted by some authorities in respect of Classes A, B and C (this does not affect the Isle of Anglesey as no such discounts are granted). This figure is calculated to be 31,705.67 (compared to 31,455.15 for 2025/26). This is an increase of 0.80%.

THE TAX BASE FOR TAX SETTING PURPOSES

The total band D equivalent discount that is used for tax setting purposes has been adjusted by a provision for non-collection, which continues to be 1.5%, and also includes allowance for Ministry of Defence properties. This figure is calculated to be 33,887.44. Note, therefore, that the figures under recommendation 3 includes the adjustments for premiums.

The total base proposed for 2026/27 for the purpose of tax setting purposes is 33,887.44. This compares with 33,472.17 for 2025/26, and is an increase of 1.24%. A number of factors impact on the taxbase, including the number of new properties that are estimated to be added to the Council Tax register in 2026/27, the number of exemptions and discounts granted and the number subject to the empty property and second homes premium and the premium percentage. The increase in the letting threshold for self catering properties to be included on the non-domestic rates register, has resulted in over 200 properties being transferred to the Council Tax register and this has increased the taxbase more than in previous years.

The tax base for long term empty properties for 2026/27 is 440.87, as compared to 422.35 for 2025/26, and is as a result of an increase of 24 empty properties which are subject to the empty property premium.

The tax base for second homes for 2026/27 is 2,215.46, as compared to 2,074.39 for 2025/26. The total number of properties which are currently subject to the premium has increased by 173 properties, mainly due to the transfer of self catering properties from the non domestic rates register, but also other properties transfer in and out of being subject to the second homes premium.

The change in the taxbase impacts on the Council's starting point for the revenue budget for 2026/27, and this will be covered in more detail in subsequent budget reports to the Executive. However, to summarise, the increase in the number of properties subject to the standard Council Tax will result in a increase of £708k in revenue (based on the 2025/26 Council Tax charge), but this will result in a decrease of £422k in Aggregate External Finance (AEF) from Welsh Government (based on the Standard Spending Assessment for 2025/26 and the same estimated level of Band D Council Tax charge as 2025/26). The increase in the number of empty properties will increase the empty property premium income by £32k, and the increase in the number of properties subject to the second homes premium will increase the income generated by £241k.

B – What other options did you consider and why did you reject them and/or opt for this option?

The full Council has the discretion, under regulations made under Section 12 of the Local Government Finance Act 1992 and, subsequently, under the Local Government Act 2003, to set discounts for prescribed classes of dwellings (mainly holiday homes and second homes (Classes A and B)). When this was introduced, the full Council decided to set a discount of nil for both prescribed classes A and B, and this has been confirmed annually thereafter. In March 2007, the full Council, on the recommendation of the Executive, also set a discount of nil for Prescribed Class C (certain types of long term empty properties) for the first time, and has done so annually thereafter.

To award discounts of 25%, 50% or 100% would be contrary to full Council policy and this option was rejected.

The full Council, on 27 February 2019, set a Council Tax premium of 100% on long term empty properties and a premium of 100% on second homes from 1 April 2024,. The calculation and recommendations herein are in accordance with that decision.

C – Why is this a decision for the Executive?

Until 2004, this calculation was determined by the full Council. This function has now been removed from the list of functions reserved for the full Council. Decisions relating to discounts and premiums, along with the setting of a local Council Tax Reduction Scheme, however, still remains the responsibility of the full Council rather than the Executive.

CH – Is this decision consistent with policy approved by the full Council?

The calculation of the tax base takes into account the full Council's current approved policy on the granting of discounts for prescribed classes A, B and C, and also the full Council's policy on awarding up to 100% Council Tax Reduction to those eligible under the Council's local scheme.

The calculation and recommendations herein are in accordance with that decision and also that the full Council, in its meeting on 27 February 2019, set a Council Tax premium of 100% on long term empty properties. The decision to increase the premium on second homes from 1 April 2024 to 100% was ratified by the full Council on 15 March 2024.

D – Is this decision within the budget approved by the Council?		
The tax base calculation will enable the full Council to set its Council Tax requirement to meet its approved budget for 2026/27.		
DD – Impact on our Future Generations(if relevant)		
1	How does this decision impact on our long term needs as an Island	The decision will impact on the Council's revenue budget and the implications of this decision on the long term needs of the Island will be considered as the revenue budget process continues.
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority. If so, how:-	Not applicable
3	Have we been working collaboratively with other organisations to come to this decision, if so, please advise whom:	Not applicable
4	Have Anglesey citizens played a part in drafting this way forward? Please explain how:-	The citizens of Anglesey will be consulted on the budget proposals in due course.
5	Outline what impact does this decision have on the Equalities agenda and the Welsh language	Not applicable
E – Who did you consult?		What did they say?
1	Chief Executive / Senior Leadership Team (LT) (mandatory)	No additional comments made.
2	Finance / Section 151(mandatory)	Author of the report.
3	Legal / Monitoring Officer (mandatory)	No additional comments made.
4	Human Resources (HR)	Not applicable
5	Property	Not applicable
6	Information Communication Technology (ICT)	Not applicable
7	Procurement	Not applicable
8	Scrutiny	Not applicable
9	Local Members	Not applicable
F - Appendices:		
Appendix A: Calculation for the Council Tax Base 2026/27		
FF - Background papers (please contact the author of the Report for any further information):		
Welsh Government Notes for Guidance on Council Tax Dwellings (CT1) 2026/27		

CALCULATION OF COUNCIL TAX BASE 2026/27

	BAND	A*	A	B	C	D	E	F	G	H	I	TOTAL
Part A	CHARGEABLE DWELLINGS											
A.1	All Chargeable Dwellings		4,706	6,678	6,961	7,262	5,419	2,729	1,060	164	54	35,033
A.2	Dwellings subject to disability reduction		10	42	55	99	91	55	14	9	6	381
A.3	Adjusted chargeable dwellings (taking into account disability reductions)	10	4,738	6,691	7,005	7,254	5,383	2,688	1,055	161	48	35,033
Part B	DISCOUNT AND PREMIUM ADJUSTMENTS											
B.1	Dwellings with no discount or premium (including empty properties and second homes with no discount or premium)	6	1,738	3,423	3,856	4,440	3,531	1,878	724	99	31	19,726
B.2a	Dwellings with a 25% discount (excluding empty properties and second homes)	4	2,744	2,957	2,645	2,181	1,396	541	184	25	6	12,683
B.2b	Dwellings with a 50% discount (excluding empty properties and second homes)	0	8	10	15	12	10	5	12	4	1	77
B.3a	Dwellings with a variable discount other than 25% or 50%	0	0	0	0	0	0	0	0	0	0	0
B.3b	Dwellings with long term empty or second homes discount		0	0	0	0	0	0	0	0	0	0
B.3c	Dwellings with long term empty or second homes premium		248	301	489	621	446	264	135	33	10	2,547
B.4	Total adjusted chargeable dwellings	10	4,738	6,691	7,005	7,254	5,383	2,688	1,055	161	48	35,033
B.5	Total variable discounts	0	0	0	0	0	0	0	0	0	0	0
B.6	Long term empty property and second homes discount adjustment	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
B.7	Long term empty property and second homes premium adjustment	0	248.0	301.0	489.0	621.0	446.0	264.0	135.0	33.0	10.0	2,547.0

Isle of Anglesey County Council

Report to:	The Executive
Date:	November 2025
Subject:	Connect to Work Programme 2025 - 2030
Portfolio holder(s):	Councillor Gary Pritchard Leader and Portfolio Holder for Economic Development
Head of service / director:	Christian Branch – Head of Service Regulation & Economic Development Service
Report author:	Tudur H. Jones – Chief Officer Economic Development
Local members:	Relevant to all

A – Recommendation(s) and reasons

The Executive is requested:

R1 to note the progress made to date with the development of a North Wales regional delivery plan for the Connect to Work Programme 2025-2030.

R2 to agree to enter into a Collaboration Agreement with Denbighshire County Council as the lead body for North Wales.

R3 to agree to submit the Ynys Mon part of the North Wales Delivery Plan to Denbighshire County Council for onward submission to DWP.

R4 to delegate acceptance of the Connect to Work funding agreement to the Head of Service and Section 151 Officer.

R5 to enter into a grant agreement with Mon CF Ltd to deliver the Connect to Work Programme on behalf of the Authority.

1. Reasons

The Connect to Work Programme is a national programme and part of the UK Government's Get Britain Working agenda. It represents the biggest reform to employment support for a generation bringing together skills and health to get more people back into sustainable employment, working in a devolved way with Welsh Government and local authorities.

The programme aims to provide local solutions to tackle economic inactivity, particularly where it is driven by disability and ill health but also aims to support those groups with complex barriers to work such as veterans, carers, refugees, homeless people, drug and alcohol dependencies, victim of domestic abuse and ex-offenders.

It was agreed at a meeting of Chief Executives that Denbighshire Council would act as the Accountable Body on behalf of the North Wales Local Authorities. A working group of local authority officers has been established and is meeting fortnightly to develop the programme with a view to submitting a Delivery Plan to DWP aiming for

approval by the end of December and commencing delivery in January 2026 until March 2030. On Ynys Mon there is a target to support 313 participants by March 2030 and 50% of these must achieve a lasting job outcome. This conversion rate is significantly higher than the 30% expected by Welsh Government Programmes past and present. Evidence suggest that this will be challenging to achieve given the complex needs of the participants.

The budget for the Connect to Work Programme nationally is £3,700 per enrolment onto the programme, which equates to £1.158M over the life of the programme on Ynys Mon, however after deducting the costs of the Denbighshire Regional Team this is reduced to £948K with a strict annual profile. The £3,029 net cost per head compared with the intensive support required by the beneficiaries is relatively low. Annual budgets will not be carried forward.

Whilst the nature of the programme and the model that will be used to deliver it is set out at a national level by DWP, how it is delivered and by whom, is left to the discretion of the local authorities to decide what will work best in their own local area.

Mon CF currently delivers Communities for Work Plus on behalf of the Local Authority and the Restart Programme on behalf of DWP (via Serco) as well as the direct delivery of an employment support and in work support programme through the Shared Prosperity Fund. Apart from JCP, they are the primary provider of employment support services on Ynys Mon and have been for a number of years.

Collaboration with local employers is going to be critical to the successful delivery of the programme as the employers will need to provide the employment opportunities. Mon CF has a good relationship with the private sector with many employers going direct to them to access their clients when they need to fill vacancies. Mon CF supported 564 people into work during 2024-25 and 460 qualifications were gained. This year to date 140 people have been helped into employment.

The current and existing governance and reporting structures that are in place with the current Communities for Work Plus Programme, being delivered by Môn CF will be utilised to ensure that role and responsibilities are clear. This is to ensure full accountability and transparency as well as a recognised mechanism for the progress of the programme to be monitored which also includes the processing of claims.

The Council and Môn CF will work in collaboration with Denbighshire on formulating and completing the Delivery Plan for Anglesey.

It is also crucial for successful delivery that Connect to Work and other employment support programmes are aligned with people being directed to the most appropriate provision. There is a risk with procuring external providers that they would be both competing for participants and job opportunities.

All local authorities are being asked to lead from the front by DWP in creating job opportunities for Connect to Work beneficiaries.

B – What other options did you consider and why did you reject them and/or opt for this opinion?

Not take part in the delivery of the Connect to Work Programme on Ynys Mon – this would result in the loss of nearly £1M external funding to support those furthest away from the labour market back into employment. This would not be viewed favourably when the remaining North Wales Authorities are participating.

Deliver the Connect to Work Programme in house or undertake a hybrid model with part delivered in house and part by an externally procured partner – the Authority has no employment support expertise so would need to establish a new team to deliver the programme and creating a potential redundancy liability at programme closure in 2030. Funding is limited and utilising existing expertise on the island would provide better value for money.

Undertake a procurement exercise in conjunction with Denbighshire Council for a delivery partner – with Ynys Mon's geography and reliance on small employers a local solution to deliver the programme utilising existing networks and expertise would work better than potentially bringing in a national provider with no local delivery presence.

C – Why is this a decision for the Executive?

Commitment to deliver the targets set by DWP until 2030 by entering into a funding agreement with both Denbighshire Council as the Accountable Body and Mon CF as the Delivery Body on Ynys Mon with a grant of almost £1M.

Ch – Is this decision consistent with policy approved by the full Council?

Yes

D – Is this decision within budget approved by the Council?

No impact on internal budgets, all externally funded.

Dd – Assessment of potential impacts (if relevant)

1. How does this decision affect our long-term needs as an island?

The programme aims to support those with the most complex barriers to work, helping to secure sustainable employment and reduce the reliance on the benefit system.

2. Is this a decision that is anticipated to prevent future costs/dependencies on the Council? If so, how?

No all costs are externally funded, with the exception of some officer time needed to manage the programme reporting and grant offer to Mon CF.

3. Have we collaborated with other organisations to come to this decision? If so, with whom?

Working regionally with the North Wales Local Authorities, DWP and following discussions with Mon CF as our current employment support provider.

4. Have the citizens of Anglesey played a part in drafting this way forward, including those directly affected by the decision? Explain how.

The programme has been designed by DWP so there has been no local consultation. Once delivery begins, services will be designed around what best suits the clients needs.

5. Note any potential impact this decision would have on the protected groups under the Equality Act 2010.

The programme specifically targets some of the protected groups under the Equality Act 2010 in order to assist them into work.

6. If this is a strategic decision, note any potential impacts the decision would have on those experiencing socio-economic disadvantage.

The programme specifically aims to help those experiencing socio-economic disadvantage so any decision not to support the programme would have a negative impact.

7. Please note any potential effects that this decision would have on opportunities for people to use Welsh and not treat the language less favourably than English.

The programme will be delivered bi-lingually and beneficiaries will have the option to choose which language they would prefer to use.

E – Who did you consult with and what were their comments?

1. Chief Executive / Leadership Team (mandatory)

The report was considered by the LT at its' meeting on 14th October 2025. Comments from the Chief Executive and other members of the LT regarding

	clear roles and responsibilities were incorporated into the final draft.
2. Finance / 151 Officer	Approval given to provide direct award grant to Môn CF as per 12.3.6 of the constitution and following input from the Procurement Manager.
3. Legal / Monitoring Officer (mandatory)	Approval given to provide direct award grant to Môn CF as per 12.3.6 of the constitution and following input from the Procurement Manager.
4. HR	N/A
5. Property	N/A
6. IT	N/A
7. Procurement	Supportive of R5
8. Scrutiny	
9. Local members	

F – Appendices

Connect to Work Programme Guidance
 Delivery Plan Template
 Annual Target Profile and Budget

Ff – Background papers (contact the report author for more information)

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Department
for Work &
Pensions

Connect to Work

Grant Guidance for Wales

31 January 2025

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The Department for Work and Pensions has adopted the principle that in the conduct of public business in Wales it will treat the Welsh and English languages on a basis of equality. The Department for Work and Pensions' Welsh Language Scheme sets out how it will give effect to that principle when providing services to the public in Wales.

The Welsh Language (Wales) Measure 2011 gave the Welsh language official status in Wales and established a new framework for introducing duties for organisations to use the Welsh language, in the form of Welsh language standards. Each organisation has its own 'compliance notice' which sets out which standards it has to comply with. The standards are based on the principle that the Welsh language should be treated no less favourably than the English language. This means that the Welsh service should be at least as good as the English service.

The Accountable Bodies shall at all times comply with the Welsh Language (Wales) Measure 2011 and the Welsh language standards with which the Accountable Body is liable to comply with and any services will be delivered (in accordance with any Specifications) through the medium of English or Welsh (on an equal basis). Accountable Bodies will be responsible for promoting the delivery of the Services in Welsh or English to the Service user and will use all reasonable steps to achieve this.

Introduction

1. One of the Government's five missions is to kickstart economic growth with good jobs and improved productivity in every part of the country. The ambition is for a more inclusive economy which enables people to get into work and to get on at work, ensuring employment opportunity for all. The Government aims to take a more collaborative, locally led approach to tackling 'Hidden Unemployment', to support local people to realise their potential through local and national growth.
2. Good quality work provides people with income, social interaction, and a sense of fulfilment and purpose among many other benefits. It's known that work has a positive effect on people's physical and mental health, and their wellbeing, while unemployment often has a harmful impact.¹
3. But in the UK, there are 1.9 million² people who would like to work but are not participating in the labour market – often due to health issues or disability. The funding for Connect to Work in England and Wales will help around 100,000 disabled people, those with health conditions and people with complex barriers to employment, to seek to find sustainable work each year, by offering them voluntary support based on the high-fidelity model of Supported Employment. 7,000 places a year in Wales will be funded through grants issued under this grant guidance. There is separate Connect to Work grant guidance for England.
4. The new Get Britain Working Strategy will bring fundamental reform that transforms our relationship with local areas and ensures we have a strong foundation with which to work in partnership to support people into good, sustainable work. This Grant Guidance launches the first major element in the Get Britain Working Strategy – Connect to Work.
5. Connect to Work will take a collaborative, locally led approach to tackling 'Hidden Unemployment'. It will help connect local work, health and skills support. The funding provides a coherent, systematic and joined up approach to maximise the benefits available for individuals and local communities. Accountable Bodies will determine how the support is delivered locally, in line with local priorities.

¹ Gordon Waddell and A Kim Burton, *Is Work Good for Your Health and Wellbeing?*, London: The Stationary Office, 2006, pp. vii-ix. Fair Society, *Healthy Lives: strategic review of health inequalities in England post-2010*, London: The Marmot Review, 2010, pp. 68-71

² <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/economicinactivity/datasets/economicinactivitybyreasonseasonallyadjustedinac01sa>

6. Connect to Work will support the wider development of locally planned systems to drive growth, working jointly between the United Kingdom and devolved Governments. It will be an important strand in local plans to tackle inactivity and expand employment opportunity. By encouraging join up between health systems and employment support, Connect to Work will support those, primarily, currently outside the workforce and facing greater labour market disadvantages, to stay in work and get back into work. In turn, supporting the Government's ambition for a more inclusive economy, supporting local people to realise their potential and supporting local and national growth. This marks an important first step towards the future devolution of employment support.
7. We want this investment to transform lives, and we know that Connect to Work can make a difference for disabled people, people with health conditions and other complex barriers to employment, helping them to get into and on in work.

Grant Guidance

8. This Grant Guidance provides detailed policy and delivery information to support Accountable Bodies (working with the Department for Work and Pensions (DWP) and local partners) to develop their own local Connect to Work offer and inform submission of their Delivery Plans. The information is likely to be useful to key local partners such as other upper tier and unitary local authorities in the Delivery Area, strategic health bodies (including Health Boards, employers and business representative bodies, voluntary and community organisations and other delivery organisations.
9. This Grant Guidance reflects the significant engagement that DWP has had with local authority representatives, devolved administrations and experts in the field of Supported Employment in developing the Connect to Work design. It sets out how Connect to Work will build on the local high fidelity Supported Employment delivery already in place in a number of areas. It provides the key information to enable local areas to start to build an offer of support to eligible and suitable people in their locality.

Responsibilities for Connect to Work

10. Accountable Bodies working (where appropriate) with constituent upper tier and unitary local authorities, Delivery Partners and DWP will be responsible for delivery of Connect to Work as outlined in their Delivery Plan. DWP and Accountable Bodies will work in partnership, with DWP providing Implementation Support for Accountable Bodies and their Delivery Partners alongside the Grant funding. As accountability for the service sits with the Accountable Body, throughout this Grant Guidance (and associated appendices and Technical Notes) delivery is described as the responsibility of the Accountable Body only.

- 11.** In order to access Connect to Work funding, Accountable Bodies are asked to complete a Delivery Plan, setting out how they intend to implement and deliver their offer, across their Delivery Area. The Grant Guidance is designed to support Accountable Bodies in preparing their Delivery Plan. It includes:
- An overview of the Connect to Work Grant.
 - The objectives and principles of Connect to Work, including the national Eligibility and Suitability Criteria and the Supported Employment offer.
 - Details of the Grant award funding mechanism and Allowable Cost activities.
 - Details of how Accountable Bodies will develop their Delivery Plans.
 - Details of the Implementation Period and the type of support on offer to Accountable Bodies and their partners.
 - How the development of a quality service will be supported by Fidelity assurance.
 - Details of Management Information (MI), the reporting requirements and the evaluation of Connect to Work.
 - The marketing and communication requirements to encourage strong engagement by potential participants and employers.
- 12.** This Grant Guidance document should be read in conjunction with the accompanying:
- Appendix A – Connect to Work Delivery Plan Guidance.
 - Appendix B – Connect to Work Delivery Plan template.
 - Appendix C – Connect to Work Grant Cost Register.
 - Appendix D – Connect to Work Draft Grant Funding Agreement.
 - All applicable Technical Notes (see Technical Note: General for a schedule of future Technical Notes).
- 13.** This Grant Guidance document may be revised by DWP from time to time as circumstances require. Updated documents will be circulated by DWP following any changes.
- 14.** Capitalised terms and acronyms referred to in this Grant Guidance are defined in the Glossary set out in Annex A and if not defined therein, they shall have the meanings given to them in the Grant Funding Agreement.
- 15.** The indicative unit cost and volumes by Accountable Body (as estimated using the Grant Formula) are set out in Annex E.
- 16.** For information on available support, and access to a question and answer log in relation to Connect to Work, see Annex F.

Connect to Work Requirements

- 17.** As a key plank in the Government's Get Britain Working Strategy, Connect to Work will primarily help disabled people, people with health conditions, and those with more complex barriers to work who are outside the labour market in 'Hidden Unemployment' who wish to be in employment, to find a suitable job and sustain work. It will also help those in work but at risk of falling out of the labour market (and who will struggle to get back into work if they lose their job) to retain their employment.
- 18.** Connect to Work is a voluntary programme to help tackle economic inactivity by providing a specific form of support targeted at the right people at the right time, based on their individual circumstances. Participants must be both eligible and suitable for the provision. Connect to Work will deliver the evidence-based Supported Employment model, 'place, train, and maintain', building on the existing DWP funded Supported Employment programmes; Local Supported Employment (LSE) and Individual Placement and Support in Primary Care (IPSPC), to deliver support to around 7,000 Participants starting per year in Wales once fully rolled out. It will complement other provisions including the Office for Health Improvement and Disparities' (OHID) Individual Placement and Support for Alcohol and Drug Dependence (IPS-AD), and other locally led programmes.
- 19.** Connect to Work will be delivered across all areas of Wales.
- 20.** Where appropriate Connect to Work funding would pass to the Additional Delivery Area Members via a grant from DWP to the Accountable Body. The Connect to Work Grant will be paid under Section 2 of the Employment and Training Act (1973). The Connect to Work Grant is a ring-fenced grant and expenditure will be agreed against the Allowable Cost Register Cost Categories and as recorded in the Grant Cost Register. This will include costs for planning, implementation and delivery.
- 21.** Accountable Bodies will be well placed to align Connect to Work delivery with economic, skills and growth hub planning. These form part of Local Enterprise Partnership (LEP) functions, which local areas will have in addition to other skills plans and strategies.
- 22.** This Grant Guidance provides detailed information to support Accountable Bodies to develop their own local Connect to Work offer and inform submission of their Delivery Plans. The Delivery Plan will contain key information including the details of the commissioning approach, the delivery approach that is planned, and the Accountable Body's design of the service.

- 23.** The Delivery Plan template and accompanying detailed guidance for completion (Delivery Plan Guidance) are provided separately. The DWP will support, as necessary, the Accountable Bodies in developing Delivery Plans which will give all parties confidence around the quality of Connect to Work delivery.
- 24.** After agreement of the Delivery Plan, the Accountable Body for the Delivery Area will enter into a Grant Funding Agreement (GFA) with DWP. Further details of the GFA are provided in Appendix D. This Grant Guidance (and any updates to it) and the Delivery Plan will form part of the GFA. Accountable Bodies should provide a copy of the GFA to Additional Delivery Area Members, alongside the GFA side letter, and facilitate its completion by each Additional Delivery Area Member.
- 25.** Each Accountable Body will be assigned a Regional Engagement Lead (REL), who will be their main point of contact into DWP. The REL will be in place to provide support throughout both the implementation and delivery phases of Connect to Work, sharing good practice and lessons learnt as well as drawing on expertise to help overcome any challenges or issues.
- 26.** Accountable Bodies may outsource elements of Connect to Work to one or more Delivery Partners as they see fit. Accountable Bodies will want to ensure their commercial strategy can identify and appoint suitable contractors. Whilst local contractual arrangements are the responsibility of Accountable Bodies, DWP notes that payment by results contract arrangements may not work well for the Supported Employment model. Delivery Partners will report to the Accountable Body on delivery of Connect to Work including against the Agreed Objectives and Performance Measures, ensuring that the appropriate number and quality of staff are maintained throughout.
- 27.** It remains the responsibility of the Accountable Body to meet all conditions of the Grant Funding Agreement. Responsibilities of the Accountable Body include:
- Commissioning or establishing a Connect to Work service using both models of Supported Employment; Individual Placement and Support (IPS) and Supported Employment Quality Framework (SEQF), for eligible and suitable Participants, to 'place, train and maintain' competitive employment within the Delivery Area. The Connect to Work service is expected to adhere to IPS and SEQF fidelity scales and will be expected to engage with the fidelity assurance system;
 - Where the Connect to Work Delivery Area covers more than one upper-tier authority and is not a combined authority which oversees the whole Delivery Area, establishing and agreeing Connect to Work governance arrangements with other upper tier authorities (using existing cross local authority governance where appropriate), including securing sign-off of Connect to Work proposals using their agreed governance process;

- Leading the development of their Delivery Area's Delivery Plan, working with and securing agreement with all upper tier and unitary local authorities within their area and other key local stakeholders;
- Shaping their Delivery Area's Connect to Work offer around local services and priorities, ensuring that the more collaborative, locally led approach supports the national ambition for a more inclusive economy, helping local people to realise their potential and furthering local and national growth;
- Managing the day-to-day operation of the programme and have overall accountability for the funding and how the grant operates within their Delivery Area;
- Ensuring that outcomes for Participants are delivered, such as sustained employment, in line with the programme's Performance Measures;
- Providing DWP with information/documentation to help with evaluation of effectiveness of the programme; and
- Determining, alongside constituent upper tier authorities, whether they deliver Connect to Work in house, via contracts, or a mixture of the two, and whether this is applied across the whole area or in parts.

28. Each Accountable Body will appoint a Single Point of Contact (SPOC), who will act as the main contact point for everything related to Connect to Work.

Eligibility and Suitability

- 29.** Connect to Work will primarily provide support for people who are economically inactive within priority groups and want to work. It will also provide support to some people to retain work who are at risk of losing employment (and if they lose their job would be unlikely to move back into work without support). Individuals participating in Connect to Work do so on a voluntary basis.
- 30.** In line with the programme's strategic intent as set out in the Introduction, Accountable Bodies are responsible for identifying people who will meet i) the eligibility criteria (which is a factual assessment); and ii) the suitability criteria (which requires judgement of the individual's circumstances), for Connect to Work within the criteria (as set out in Annex B). Accountable Bodies will shape provision around priority groups, for those who meet the Eligibility and Suitability Criteria, to reflect local need and consideration of other employment support available within the Delivery Area.
- 31.** Accountable Bodies should target Connect to Work at participants they assess are most likely to benefit from the Supported Employment model of support. Accountable Bodies will determine who will deliver Connect to Work in their area. Potential participants will be assessed by the Accountable Body and must meet both the Eligibility and Suitability Criteria. The Employment Specialist³ will confirm whether Connect to Work is the most appropriate support to help them find and/or retain work (see Design and Delivery section), such that without the help of the Supported Employment model they would be unlikely to find, maintain or retain work.
- 32.** Eligible participants must be in one of the following groups:
- A disabled person, who has a disability or a long-term health condition, as defined in the Equality Act 2010⁴ or the Social Model of Disability⁵; or
 - A specified disadvantaged group, as detailed in Annex B of this Grant Guidance.
- 33.** Further details on the Eligibility and Suitability Criteria for Connect to Work including detailed descriptions of the Participant groups are provided in Annex B.
- 34.** Accountable Bodies cannot extend or amend the Eligibility or Suitability Criteria but do have flexibility to shape provision around priority groups, for those who are eligible and suitable, to reflect local need and provision of other employment support.

³ The practitioners, employed or engaged by an Accountable Body and/or an Additional Delivery Area Member, who carry out all phases of employment support on Connect to Work, who are responsible for supporting people back into paid employment and supporting those in employment to stay in work.

⁴ www.gov.uk/government/publications/equality-act-guidance/disability-equality-act-2010-guidance-on-matters-to-be-taken-into-account-in-determining-questions-relating-to-the-definition-of-disability-html

⁵ www.gov.uk/government/publications/inclusive-communication/portraying-disability

- 35.** Prior to referring a participant, Accountable Bodies are responsible for confirming Eligibility and Suitability for each participant, including whether the participant is on another DWP provision (see Fit with Other Provision section below for details).

Fit with Other Provision

- 36.** Accountable Bodies will have the responsibility to decide the fit of Connect to Work with wider government and local support (as will be reflected in their local work, health and skills plan). They are best placed to understand the landscape of local support through using their geographical knowledge to decide the best fit provision for an individual.
- 37.** The principles below can act as a guide when making decisions on whether other support accessed alongside Connect to Work will help the Participant get the most from the programme, or whether it will duplicate or overlap with what they are likely to receive from Connect to Work, representing poor value for money. Any employment support delivered at the same time as Connect to Work should be complementary, with the aim of improving the likelihood of individuals securing or retaining employment. These principles are:
- Individuals are referred to provision that is the best fit for their needs, even if this is not Connect to Work.
 - Individuals cannot be on Connect to Work at the same time that they are on another intensive employment provision designed to deliver sustained work outcomes, or on a programme that may be detrimental to Participants engagement with Connect to Work.
 - Integration with other relevant services for individual Participants is key and will be encouraged as far as possible, in order to provide holistic support.
 - Individuals who are on DWP programmes should continue with the programme up to the agreed end point. Participants who have previously been on other provision may access Connect to Work if they meet the Eligibility and Suitability Criteria.
- 38.** Any local or national Supported Employment programme such as Individual Placement and Support for Alcohol and Drug Dependence and Individual Placement and Support for Severe Mental Illness should not be accessed by individuals simultaneously with Connect to Work. If these services are available, there should be consideration as to which is more appropriate for the individual.
- 39.** The previous completion of any local or national Supported Employment programme does not prevent individuals from accessing Connect to Work if they meet the Eligibility and Suitability Criteria.
- 40.** See Annex C of Technical Note: General for further guidance on how Connect to Work fits with other provisions.

Funded Activities

- 41.** To deliver the strategic intent as set out in the Introduction, the scope of Funded Activities is set out below. Details on Allowable Costs are provided in the Allowable Costs section. and Technical Note: General.

Supported Employment Model

- 42.** As set out in the Introduction, Connect to Work will build on the local high fidelity Supported Employment delivery already in place in a number of areas. The Grant should be used to deliver the evidence-based Supported Employment approach. There is an international and domestic evidence-base demonstrating that Supported Employment is effective in enabling a range of groups to enter jobs that match individual and employer needs and helps that work to become sustained work.
- 43.** Connect to Work will deliver support based on both IPS⁶ and SEQF⁷ fidelity scales. Connect to Work will utilise and expand on the approach taken with IPSPC and LSE. Whilst Connect to Work will complement the existing IPS SMI and IPS-AD services, these will remain separate IPS services.
- 44.** It will be Accountable Bodies' responsibility for ensuring that support will be available to meet the needs of all Participants including delivery of both Supported Employment models. DWP does not intend for the Accountable Body to establish two separate Supported Employment services. Instead, there will be one Connect to Work service (even if it is formed of multiple teams).
- 45.** The Connect to Work service will adhere to IPS and SEQF fidelity scales and Accountable Bodies will be expected (with their prospective Delivery Partners) to engage with the fidelity assurance system which DWP will establish. See the Fidelity Assurance section for more information on the fidelity assurance system.
- 46.** The Accountable Body will be responsible for determining whether IPS or SEQF is the most suitable model of support to best address a Participant's individual needs and circumstances. They will need to deliver both models to meet the needs of all Participants. Delivery Areas will need to consider their identification routes to generate participants that reflect that mix of need.
- 47.** It is expected that the majority of Participants will require IPS support and the remainder SEQF. DWP has assumed that there will be a 75%/25% split at a national level. Note that this estimate has not been determined using the Grant Formula. The indicative estimates of volume of participants, and unit cost have been determined using the Grant Formula. For further information, see Grant Formula for Connect to Work: Methodology Note.

⁶ ipsworks.org/wp-content/uploads/2017/08/IPS-Fidelity-Scale-Eng1.pdf

⁷ www.base-uk.org/SEQF_Model_Fidelity

- 48.** Accountable Bodies will be required to set out in their Delivery Plan the estimated proportion of Participants in their Delivery Area that they plan to receive IPS and SEQF support. This estimated proportion may vary from the 75% /25% split reflecting local needs; however, the Accountable Body will need to consider how they can still achieve the agreed volume of Programme Starts within their Grant funding allocation. The Accountable Body will then monitor and manage the split as agreed with DWP in their Delivery Plan.

Caseload Sizes

- 49.** The service should be delivered by Employment Specialists adhering to the Supported Employment fidelity models (see the Fidelity Assurance section).
- 50.** The Employment Specialist will actively provide support to a number of Participants at any time, this being their caseload.
- 51.** Caseload averages form a key element of demonstrating fidelity to the IPS and SEQF models. These caseload parameters are in place to ensure Employment Specialists can dedicate the appropriate level of support for each Participant's needs.
- 52.** The Employment Specialist should have an average maximum active caseload of 25. Wherever possible, each Participant should work with the same Employment Specialist for the duration of Connect to Work.
- 53.** Both IPS and SEQF models have a definition of an active Participant set out in their fidelity model.
- 54.** Within the average maximum caseload of 25, some fluctuations and variations will be expected as delivery progresses. Caseload sizes will be discussed with DWP as part of performance measurement and assurance (see the Performance Measurement and Assurance section). The average caseload should be considered across the whole of each Delivery Area.
- 55.** As a guide, an Employment Specialist only providing SEQF support should operate a smaller caseload, with an average maximum caseload size of 20, in comparison to an average maximum caseload size of 25 for IPS.
- 56.** The Supported Employment model is predicated on regular contact between the Participant and Employment Specialist. The frequency of contact required within IPS and SEQF is set out in the fidelity scales. Employment Specialists co-ordinate access to integrated health and wider support (for example – debt, housing, skills) working through key stakeholders. The Employment Specialist should consider how best to integrate Connect to Work with a Participant's support needs as appropriate.

Design and Delivery: Participant Journey

Identification and Introduction to Programme

- 57.** Accountable Bodies are responsible for the identification and securing of eligible and suitable people to participate in Connect to Work and finding appropriate routes to reach economically inactive people to offer them support. Accountable Bodies should use their established relationships with many of the key strategic and delivery partners from which potential Connect to Work participants are already receiving support, including health support, to generate potential participants in Connect to Work.
- 58.** Accountable Bodies should ensure that, as part of the delivery of Connect to Work, Participants and Supporting Organisations understand:
- What Connect to Work is.
 - The benefits offered by participation in Connect to Work.
 - What participation in Connect to Work involves.
 - Eligibility and Suitability for Connect to Work.
 - How to register interest in Connect to Work.
 - Where to go for further information.
- 59.** The Accountable Body is responsible for enabling a broad range of Supporting Organisations to generate interest and support potential participants to access Connect to Work. Supporting Organisations are likely to include, for example:
- Health boards and trusts.
 - Jobcentre Plus.
 - Primary care (GPs, practice nurses, allied health professions, other primary care staff members).
 - Community care and other care settings (For example, NHS Counselling, pain clinics, physio and other community care services, psychology, and/or psychotherapy) and social prescribing.
 - Charities (national and local).
 - Local groups including faith groups and groups focussing on specific barrier conditions and disadvantages.
 - Prison work coaches and mentors within prisons.
 - Rehabilitation centres.
 - Domestic abuse refuges.

- 60.** The Accountable Body will wish to consider how best to integrate Connect to Work with key support networks. For example, the Employment Specialist can form part of the clinical team working in primary or community care settings. They can form part of professional or physical health teams in the same way as practice nurses, pharmacists, psychologists, physiotherapists etc attend regular team meetings to assess the employment support needs of patients. They can work in a GP practice/ health centre in person for at least part of their week and actively participate in practice team meetings and liaise with other staff.
- 61.** The Accountable Body has responsibility for stimulating interest in the programme for potential participants so that it can meet its expected starts profile. The agreed number of starts on Connect to Work will be split between 'Out-of-Work' Participants and 'In-Work' Retention Support Participants. Given that the support required to meet Participant needs is likely to be more intensive in the 'Out-of-Work' cases, these cases are expected to cost more. The split between 'Out-of-Work' and 'In-Work' Retention Support is expected to be 85%/15%, which is reflected in the average unit cost. This ratio will be considered and agreed based on delivery experience as part of the Annual Review, however a modest deviation is permitted.
- 62.** To achieve their agreed volumes including the number of Programme Starts the Accountable Body should engage actively with Supporting Organisations in its local network, discussing potential numbers of cases, agreeing expectations, feeding back on quality, and looking for continuous improvement.
- 63.** Some Participants may be sexual, violent or certain other dangerous offenders who are being managed in the community. The Accountable Body is responsible for making sure arrangements are in place to enable the Multi Agency Public Protection Arrangements (MAPPA) notifications to keep staff and other Participants safe.⁸

Expressions of Interest

- 64.** Individuals wishing to be considered for participation in Connect to Work, will need to complete an 'Expression of Interest' in order to make an application. Accountable Bodies will be provided with standardised content to use (for more information see Technical Note: General).
- 65.** The 'Expression of Interest' content will provide the Accountable Body with sufficient information to undertake a preliminary eligibility check (the participant pre-screen as detailed in the process map, at Annex C), filter out ineligible participants, and to manage prospective participants through the Participant journey (including contacting the potential participant).
- 66.** Having standardised and consistent data collected as part of the 'Expressions of Interest' process is important for both DWP and Accountable Bodies who will both have uses for this data. How the data is collected is for the Account-able Body to decide, and may reflect existing local arrangements.

- 67.** If the potential participant is deemed as likely to be eligible, an initial meeting should be arranged.

Engagement – Initial Meeting with Participant

- 68.** The initial meeting is the point at which a tailored assessment takes place to ensure the participant receives the support that best meets their needs.
- 69.** The Accountable Body should confirm participant eligibility, check suitability and collect relevant information about the participant. This should include establishing participant involvement with other provision and previous enrolment on Connect to Work. Those who do not meet the agreed Eligibility and Suitability Criteria, or do not wish to participate, should be signposted to other support and included in local triage processes (where available).
- 70.** During the initial meeting, all participants should demonstrate that they understand and have agreed to engage with the Connect to Work offer.
- 71.** The meeting should be used to establish the most appropriate model of Supported Employment for each participant, either IPS or SEQF. Where identification of specific support is unclear, IPS should be the default service.
- 72.** Participants are expected to remain on the same model until the provision ends. Participants are able to move between the IPS and SEQF models, however if new information (e.g., during vocational profiling) or a change of circumstance indicates the alternative model would best suit the Participant's needs. Accountable Bodies should determine whether the Participant will move forward as part of the 'Out-of-Work' or 'In-Work Retention Support' journey.
- 73.** At the initial meeting, once the potential participant has confirmed that they agree to participate and wishes to continue with Connect to Work, the first vocational profile meeting should be arranged.
- 74.** Additionally, the Participant's details should be shared with the central DWP team for registering on DWP systems (see Technical Note: General).

Vocational Profiling

- 75.** This is a detailed and unique "discover and planning process" that enables the Participant to identify their passions, strengths, needs, and employment goals, and work out a plan for getting there.
- 76.** Employment Specialists, working with Participants will co-produce a vocational profiling assessment to build a rich and rounded profile of the Participant. This will inform a Vocational Action Plan which details the next steps required, career planning and support strategy (for more information see Technical Note: Supported Employment Delivery Model).

Employer Engagement

- 77.** Accountable Bodies should proactively engage with employers to build a diverse range of employment opportunities that will be accessible for Connect to Work Participants.
- 78.** Employers should be supported by Accountable Bodies to recruit and retain Connect to Work Participants. This support should last the duration of the employer's involvement with Connect to Work, including providing access to workplace adjustments where appropriate (for more information on employer engagement see Technical Note: Supported Employment Delivery Model).
- 79.** Financial incentives for employers to employ Participants is not part of the Supported Employment model and must not be used to encourage an employer to engage with Connect to Work, to employ a Connect to Work Participant, or for any other reason.

Job Matching

- 80.** The Employment Specialist should work with 'Out-of-Work' Participants on activities they need to complete to find secure employment. Realistic goals regarding the employment objective should be maintained, whilst focusing on the wishes of the Participant. If Participants are in the 'In-Work' Retention Support journey, flexible options should be considered to sustain work, such as identifying new needs or carving out new roles.
- 81.** Using the Vocational Action Plan, Employment Specialists and Participants should work together to identify vacancies that are a good match between Participant, employer and job, including through vacancies that are not advertised, but that the employer wants to fill.
- 82.** The Employment Specialist should also work to understand the needs of the employer to help identify Connect to Work Participants who could be a good match to their needs, vacancies, and organisation culture.
- 83.** This is designed to ensure the Participant gets a job role that meets their aspirations, whilst the employer has a clear understanding of the needs of the employee, and the employer is offered potential candidates which are likely to be a good fit for their organisation needs.
- 84.** All Participants should be provided with assistance from Employment Specialists, when considering job vacancies to understand the impacts, including independent benefits advice for claimants. Where applicable, they should obtain comprehensive, individualised work incentives, planning and assistance to access employment benefits, when making decisions about changes in work hours and pay. As part of this, the Accountable Body should adopt a strong disclaimer on better off calculations, ensuring the Participant is always present when they are completed and has read and understood the disclaimer (for more information on Job Matching see Technical Note: Supported Employment Delivery Model).

On and Off the Job Support

- 85.** When in employment, the support given to Participants should be individually tailored and targeted, and will depend on their requirements, capabilities, and employment status. Support given, both in work and outside of work, should empower the person to understand and learn what support they need, when they need it, and where and how to find it.
- 86.** Support should also be tailored to the Participant's employer depending on their requirements and capability. The Employment Specialists should look to support employers, helping them to build inclusive workplace cultures, working as an advocate for the Participant if any issues arise.
- 87.** The Participant, Employment Specialist, and employer should agree on support and action the arrangements needed to put this support in place.
- 88.** The Employment Specialist should also offer help with career development i.e., assistance with education, more hours, more responsibility, a more desirable job, or more preferred job duties.
- 89.** Where appropriate, support from Connect to Work should be gradually substituted by support from colleagues. This builds inclusive companies that are internally equipped to employ people who require additional support.
- 90.** Participants may benefit from additional support that is not specific to employment such as solving practical problems or maintaining contact with wider support services. Employment Specialists should provide that support or signpost Participants appropriately, where they do not hold the requisite expertise (for more information about on and off job support, see Technical Note: Supported Employment Delivery Model).

In-Work' Retention Support

- 91.** Connect to Work includes assistance for those at substantial risk of losing their current employment, and those who require support to retain existing employment, or to move to new employment.
- 92.** For those accessing the 'In-Work' Retention Support element of Connect to Work, the appropriate IPS or SEQF model of Supported Employment should still be followed. There may be some differences in the support offered to the Participant and their employer, for example, within the 'Job Matching' stage.
- 93.** Participants may wish to increase their working hours and seek progression opportunities and development as appropriate. Where this is not possible with a Participant's current employer, an alternative job could be appropriate.

- 94.** If it becomes apparent that a job is not suitable, the Participant may leave their current job, and the Employment Specialist will provide appropriate support for transition into another role, where possible. If a job change is required, the Employment Specialist may be able to help the employer source a suitable candidate for the role that the Connect to Work Participant has left.

Self-Employment Support

- 95.** The Employment Specialist should recognise the different variations of self-employment which includes but is not limited to, entrepreneurship, freelance, contracting and working within the gig economy. Self-employment support should be tailored to reflect the needs of the Participant.
- 96.** For the Self-employed 'In-Work' Retention Support cohort, support could include assistance in online business development, financial management, accessing mentors, networking events, PR and linking in with business support provision. This may also include support around time management, managing health conditions, applying for Access to Work support, accessing support to recruit staff, and creating marketing materials.
- 97.** Self-employment support for those 'Out-of-Work' could include support with, market research, business planning, digital skills (including online marketing and using online platforms) accessing grants, personal and business budgeting. Enterprise and viability assessments could also form part of the Participant's vocational profile.
- 98.** Support will not necessarily always come from the Employment Specialist and link up between providers and platforms or people with specialist knowledge of self-employment should be encouraged. This includes facilitating entrepreneur peer support and/or networking.
- 99.** For more information on self-employment see Technical Note: Self-employment.

End of Provision for Participants

- 100.** Support for Participants will end when:
- They have achieved the agreed employment goals and no longer require programme support (requires an early exit – see Technical Note: PRaP).
 - They have been on the programme for 12 months (365 calendar days) for ‘Out-of-Work’ Participants, or 4 months (122 calendar days) for Participants that required ‘In-Work’ Retention Support, and their participation on the programme has not been extended.
 - There has been a change of circumstances (see the Change of Circumstances section below) and/or the Participant has left the programme, unless by exception an extension is agreed by the Accountable Body (requires an early exit – see Technical Note: PRaP).
- 101.** At the end of provision, where possible, the Employment Specialist should conduct a discussion with each Participant and jointly complete, and then agree, a final version of the Vocational Action Plan to guide further activity by the Participant | (see Technical Note: General for further details).
- 102.** In addition to this, in cases where Participants did not transition into employment, the Accountable Body should signpost the Participant to any suitable local provision using knowledge of the local provision landscape.

Disengaged Participants

- 103.** Where Participants fail to attend meetings or follow the Employment Specialists advice, it is the responsibility of Accountable Bodies to make sure that all appropriate steps are taken to re-engage Participants. If this is not successful, Participants should be informed that they will no longer be a Participant of the programme.
- 104.** Accountable Bodies have discretion to determine what constitutes appropriate contact with disengaged Participants. In the instance where Participants are re-engaged, they have the opportunity to continue with Connect to Work for the duration of time that is left on the programme. Accountable Bodies are able to offer one of the flexibility options (see the Flexibilities section) to Participants who disengage and re-engage with Connect to Work if they have not been removed from the programme. Where Participants have disengaged and been removed from the programme they can be re-referred, but Accountable Bodies will need to ensure that they remain eligible and suitable for Connect to Work.

Change in Circumstance

- 105.** There should be a clear distinction in treatment between people reporting changes in their circumstance and those that constitute early disengaged leavers. Participants who, due to changes in circumstance (e.g., location, health condition, caring responsibilities), were delayed in reporting their changes, are not classed as disengaged.

Change of Location

- 106.** If a Participant moves outside England and Wales, the provision will end (see Technical Note: General for further details).
- 107.** When a Participant relocates outside their current Connect to Work Delivery Area but remains within England and Wales, the Participant should have the opportunity to leave or continue with support with the same Accountable Body. The Accountable Body has the responsibility to ensure that its ability and capability to deliver Connect to Work does not impact the level of support outside their Delivery Area being offered to the Participant, such as the local knowledge of support and employers, and to decide whether this is an appropriate option. Where the Accountable Body does not have the ability or capability, the Participant should be re-referred in the new Delivery Area.

Change in Employment Status ('Transition')

- 108.** Where 'In-Work' Retention Support Participants fall out of employment, and need more intensive support to find work, they can continue receiving support for the time remaining on the programme. The support should continue to follow the five stages of Supported Employment, and the Vocational Action Plan should be updated to reflect the change in employment status. If the Participant still requires support either to return or sustain employment the Accountable Body can follow the flexibilities outlined in the Flexibilities section, or they may re-refer Participants, beginning with the 'Expression of Interest' process, so long as the current duration of support has ended. See Technical Note: PRAp for further detail.

Flexibilities

- 109.** Reflecting the nature of the target group, a Participant's allotted time on Connect to Work can be flexed by the Accountable Body on a case-by-case basis where it would be of benefit to the Participant and funding allows. Funding for these flexible options is subject to, and included in, the Maximum Sum set out in the Grant Funding Agreement.

- 110.** Flexible options (see Technical Note: General for further details), which are not mutually exclusive, include:
- pausing,
 - extending, and
 - re-referral.

Participant Complaints

- 111.** Any complaints and conflict management in relation to the Connect to Work service must be handled by the Accountable Body in line with their established complaints management policies and procedures.

Implementation

- 112.** Subject to paragraph 139 of this Grant Guidance regarding the s31 grant, during the Implementation Period, it is expected that Accountable Bodies will deliver the activities outlined in their Delivery Plans. Funding of up to 5% of the Maximum Sum is available to cover these costs. For example:
- Procurement and appointment of Delivery Partners and training partners, if applicable.
 - Relevant recruitment and training carried out.
 - Development of supporting processes and procedures ready for service.
 - Marketing of Connect to Work.
 - Regular engagement by Accountable Bodies through the provision of the Implementation Support.
- 113.** Recruiting sufficient numbers of high-quality staff will be critical to the success of this programme. Accountable Bodies are given the opportunity in their Delivery Plan to detail their plans to recruit the appropriate resource to deliver the programme, including specified roles such as Employment Specialists, alongside plans to ensure all managers and frontline staff have a consistent understanding of the Supported Employment models.
- 114.** DWP recognises that Accountable Bodies may be at different stages of readiness to deliver Connect to Work. Therefore, to support success and build capability, DWP will make available dedicated Implementation Support. See Technical Note: General, for more information on Implementation Support.
- 115.** Engaging with the Implementation Support offer is encouraged, and local expertise and contexts will be recognised through flexibility in the support offered.

Fidelity Assurance

- 116.** In line the programme's strategic intent as set out in the Introduction, the most effective Supported Employment programmes demonstrate fidelity to the five-stage Supported Employment model. Connect to Work will therefore be underpinned by a Fidelity Assessment system to ensure the development and consistent delivery of high-quality services. DWP will be responsible for procuring the Fidelity Assessment system and Accountable Bodies should actively engage with this process.
- 117.** The Fidelity Assessment system will involve both self-assessment and external assessment. The external assessment will be delivered by a Third Party and will comprise of scored assessments of services, alongside a full report and the co-production of an action plan with the Accountable Body/Delivery Partner(s) for improvement. Assessments will be conducted in-person at delivery sites through the collection of evidence and interviews.
- 118.** All Fidelity Assessments will be conducted against the appropriate scale for the support provided – IPS-25⁹ or the shortened SEQF¹⁰. The scales will have their language adapted, in collaboration with Supported Employment experts, to make them relevant to the Connect to Work context without diverging from the existing evidence base.
- 119.** All Accountable Bodies and/or their Delivery Partner(s) will receive an initial Fidelity Assessment from the external Fidelity Assessment provider after month 12 of the Delivery Period. DWP and the Third Party Fidelity Assessment provider will work with Accountable Bodies to determine the schedule for Fidelity Assessments
- 120.** In preparation for the initial external assessment, all Accountable Bodies and/or their Delivery Partner(s) will first be required to conduct an internal self-assessment. All Accountable Bodies and/or their Delivery Partner(s) will also be required to complete self-assessments in between receiving an external assessment. Materials will be provided by the Third Party Fidelity Assessor.
- 121.** Engagement with the Fidelity Assessment system is a Grant condition. Engagement with self or external assessments, and with the co-production of action plans for service improvement, are conditions and part of the Performance and Engagement Framework (see Technical Note: General). Accountable Bodies and/or their Delivery Partner(s) will need to fully engage with the assessment process.

⁹ ipsworks.org/wp-content/uploads/2017/08/IPS-Fidelity-Scale-Eng1.pdf

¹⁰ www.base-uk.org/SEQF_Model_Fidelity

- 122.** Scores, reports, and co-produced action plans will be shared with DWP by the Fidelity Assurance provider for information and to help DWP provide additional support where needed. Resulting scores from a Fidelity Assessment do not form part of the Performance and Engagement Framework, therefore Performance Measures will not be attached to Fidelity Assessment scores.
- 123.** More detailed information on the Fidelity Assessment process and requirements will be shared by DWP during the Implementation Period.

Marketing and Communications Strategy

- 124.** Raising awareness of Connect to Work amongst eligible and suitable participants in local areas can help to build trust and encourage participation. This will be most effective if awareness is built before areas go live with Connect to Work.
- 125.** To raise awareness, Accountable Bodies should promote Connect to Work, ensuring it is recognised across their locality. This should include:
- Ensuring easy access to information on the programme through social, online and print media.
 - Making information accessible in formats suitable for people with sensory impairment and/or in other languages.
 - Using both existing and new networks to Connect to Work across a range of systems.
- 126.** DWP will provide Connect to Work Branding Guidance which will contain information about use of the Connect to Work name and any national branding requirements, as well as materials to support Accountable Bodies to take account of these requirements in any publicity, marketing, or communications materials.
- 127.** Materials produced by Accountable Bodies must not adversely affect the reputation of the programme, or the Government. For example, marketing materials should not include communications or messages which could lead to adverse media attention or could be misunderstood or misinterpreted.
- 128.** Marketing and communications products do not need to be submitted to DWP for quality assurance, however Accountable Bodies can submit products to be checked if they would find that helpful.

Grant Funding

- 129.** To support implementation, the Connect to Work Grant payment will be made monthly in arrears for planning and implementation activities during the implementation period, and quarterly in arrears for the Delivery Period. This will be based on:
- The financial profile of the Accountable Body formatted and profiled as set out in the Allowable Cost Register Cost Categories, as detailed in the Grant Cost Register.
 - The validation of costs claimed with any adjustment to sums paid against the value claimed being made against subsequent Monthly or Quarterly (as applicable) reimbursement cost claims.
- 130.** Thereafter, the Grant will be paid to the respective Accountable Body Quarterly in arrears based on:
- The financial profile of the Accountable Body, formatted and profiled as set out in the Allowable Cost Register Cost Categories, as detailed in the Grant Cost Register.
 - The validation of costs claimed with any adjustment to sums paid against the value claimed being made against subsequent Quarterly reimbursement cost claims.
 - To note claims may be subject to adjustment through formal reviews, see the Cost Validation section for full details.
- 131.** Subject to paragraph 129 above, the Grant will be paid in combined Quarterly payment instalments. During the cost validation exercise DWP will work collaboratively with Accountable Bodies to test the process at the outset and implement the necessary requirements. DWP will provide the relevant support before and throughout the process and will make any adjustments in a timely manner. The cost validation exercise will be undertaken in accordance with the provisions set out in the Cost Validation section to ensure only Allowable Costs are claimed, with each cost element being claimed supported through financial and other records. It will include sampling across costs and amounts claimed and other sources of assurance. Payment of the Grant may be suspended or adjusted if an Accountable Body includes Unallowable Costs, costs claimed cannot be validated. Further details are included within the Technical Note: Performance Measurement and Assurance, and Technical Note: Cost Validation.

Funding Period

- 132.** The Funding Period is intended to run from the commencement date of the Grant Funding Agreement and ends on 31 March 2030. Funding is not guaranteed and is subject to agreement at spending reviews and fiscal events. Accountable Bodies will recognise that the adjustment of or cancellation of funding may be the outcome of such reviews and events and DWP may terminate the Grant Funding Agreement if funding is withdrawn (as detailed in clause 4.5 of the Grant Funding Agreement). In addition to the Implementation Period, and the Delivery Period, the Delivery Period covers two further phases of activity by the Accountable Body:
- a phase where Participants are recruited and supported (referred to herein as the recruitment phase), and
 - a phase where recruitment has ceased, but existing Participants continue to be supported (referred to herein as the support only phase).
- 133.** During the recruitment phase, Accountable Bodies will be seeking to identify potential participants, establishing Eligibility and Suitability, and supporting Participants either in their job search and into employment, or to remain in employment.
- 134.** The Employment Specialist will provide a maximum of 12 months (365 calendar days) support to an ‘Out-of-Work’ Participant, and 4 months (122 calendar days) support to an ‘In-Work’ Retention Support Participant, subject to the flexibilities described in this Grant Guidance and Technical Note: General.
- 135.** Subject to paragraph 132, the Accountable Bodies should take account of the funding end date and programme support durations when making decisions on Participants joining the programme in the final year to ensure they are fully funded. In making calculations about managing the support only period, Accountable Bodies should bear in mind that the Employment Specialist will provide up to 12 months (365 calendar days) support to an ‘Out-of-Work’ Participant, and 4 months (122 calendar days) support to an ‘In-Work’ Retention Support Participant, with the flexibilities described in the Flexibilities section of this Grant Guidance and Technical Note: General.
- 136.** DWP will have detailed and collaborative conversations with Accountable Bodies about arrangements for ending Connect to Work at an appropriate time before the support only period is reached.
- 137.** At the transition point from the recruitment phase to support only phase, if the Accountable Body feels there are reasonable grounds for admitting further Programme Starts, this can be discussed and where appropriate may be considered by DWP on a case-by-case basis.
- 138.** During the support only phase of the Grant, the Accountable Body should consider how to take the necessary steps to close the programme and as appropriate, transition Participants to alternative support.

Funding in the Implementation Period

- 139.** Each Accountable Body will be able to apply for set up costs of up to 5% of the total Grant value. The payment will be made in arrears and be based on an invoice of actual costs. Any funding provided to Accountable Bodies under a separate section 31 grant award, for the purpose of funding implementation activities within the Implementation Period, shall be deducted from the Maximum Sum available in relation to Connect to Work.
- 140.** Costs relating to the Implementation Period are to be profiled in the Grant Cost Register. This has two elements: first, planning relating to the production of the Delivery Plan and any cost associated with submission; and second, implementation related costs. These two elements can comprise any Allowable Cost required for planning and implementation activities. For reimbursement of Allowable Costs incurred, as a guide a period of around 6 months preceding the start of the Delivery Period. Accountable Bodies are encouraged to discuss with DWP where their implementation arrangement may differ from this.

Funding in the Delivery Period

- 141.** The basis of payment during the Delivery Period (following the Implementation Period) is the reimbursement of Allowable Costs incurred. Payment will be made up to a maximum of the cost recorded in the approved Grant Cost Register for the Quarter being claimed.
- 142.** Reimbursement of Allowable Costs incurred will be made on a Quarterly basis in arrears based on the Grant Cost Register cost profiles. A cost validation exercise will be undertaken to ensure:
- The total claimed is not more than the total sum in the approved Grant Cost Register for the Quarter claimed.
 - Only Allowable Costs have been claimed.
 - The claimed sums reconcile to the approved Grant Cost Register Cost Categories and sums for each month of the Quarter.
 - Finance, payroll and other records fully support each entry and sum claimed.
 - Any payment adjustment (+/-) following cost validation will be made through adjustment to the subsequent Quarterly payment. The final grant payment will include any adjustment from the previous Quarter and any final adjustment for the final Quarter.
- 143.** The cost validation process is introduced in paragraph 150, and the Technical Note: General. More detail will be provided in the Technical Note: Payment and Cost Validation.

Underspends and Performance Against Profile Volumes

- 144.** Delivery Plans need to profile potential Programme Starts for the duration of the Funding Period broken down into Financial Years and monthly within Financial Years. Payment will be made up to the maximum value claimed for the relevant period as recorded in the approved Grant Cost Register profile for the same period.
- 145.** Expenditure on Connect to Work is annualised and there is no automatic facility to transfer underspends from one financial year to the next. Those Accountable Bodies who think they can demonstrate a clear plan for expenditure moving from year to year are advised to raise this with DWP.

Allowable Costs

- 146.** A full list of Allowable Costs is recorded in the "Allowable Costs Register" tab of the Grant Cost Register and clause 5.2 of the Grant Funding Agreement. Reasonable expenses and support for participating in Connect to Work should be provided by the Accountable Body/Delivery Partner to Participants – to ensure that Participants are not worse off for attending provision. These are to be included as part of the monthly expenditure profile across the Funding Period.
- 147.** Further details on the Allowable Costs are set out in the Technical Note: General.
- 148.** To be considered Allowable Costs, all costs must be clearly evidenced as being solely attributed to the delivery of Connect to Work. For example, Employment Specialist costs must be in addition to staff delivering other existing Supported Employment provisions.
- 149.** Duplicate Funding is prohibited, therefore any intended Third Party funding for activities that are the same or like the Funded Activities of the Grant will need to be declared as Match Funding and will be subject to prior written consent of DWP. See clauses 4.10 and 27.1.8 of the Grant Funding Agreement for further details on Duplicate Funding.

Cost Validation

- 150.** The Connect to Work Grant payments will be based on the reimbursement of Allowable Costs incurred and claimed by the Accountable Body. Cost validation is an essential requirement to ensure payment is only made against Allowable Costs outlined by Accountable Bodies within their agreed Grant Cost Register and monthly profiles. Accountable Bodies will need to provide assurances and meet requirements set by DWP. See Technical Note: General, and Technical Note: Payments and Cost Validation.

Unallowable Costs

- 151.** Unallowable Costs are any costs that are not Allowable Costs, see clause 5.3 to 5.4 the Grant Funding Agreement for further details on prohibited costs.

Management Information (MI) and Reporting Requirements

- 152.** Accountable Bodies are to provide the specified MI in accordance with the template MI report that DWP shall provide. DWP requires the MI for the following purposes:
- tracking information to ensure the objectives of Connect to Work are met through delivery;
 - as a source of evidence for the monitoring and evaluation of the programme; and
 - to enable wider evaluation activities such as impact analysis and sampling for research.
- 153.** DWP recognises it would be best, wherever possible, if the collection of MI (including Personal Data where required) could be automated. Accountable Bodies will be expected to work with DWP on developing automated systems. DWP will also keep the potential for further automation of MI under review and update Accountable Bodies accordingly. This may mean that some elements of MI that start as manual collection move, in time, to be automated.
- 154.** Further details on which MI requirements are currently digital or to be reported manually along with their frequency will be provided in the future Technical Note: MI. Please note that the specific requirements listed in this future Technical Note may be updated by DWP from time to time. There is also the opportunity to capture relevant notes or information that give additional context to the reported information. It should contain updates on progress achieved over the previous period.
- 155.** For Allowable Cost reimbursement, Accountable Bodies are required to capture all Connect to Work related expenditure over the Quarter as a cumulative total from the start of the programme against each expenditure type stated. See the Grant Funding section for payment model and costs.
- 156.** The template MI report and its frequency of return may change before and during the operation of the programme. Accountable Bodies will be notified of any changes where necessary.
- 157.** DWP expects to monitor earnings information via Real Time Earnings (RTE) for employed Participants. However, Accountable Bodies and/or Delivery Partners will need to obtain and retain evidence to provide assurance relating to hours worked, duration of employment and job roles. For MAPPA/SCR Participants, information to support outcomes (to be held clerically) may include information and documentation provided by the employer and wage slips. The MAPPA/SCR claims process is detailed in Technical Note: Job Outcomes.
- 158.** The data supplied by His Majesty's Revenue and Customs (HMRC) does not contain earnings from self-employment. Therefore, Self-employed Job Outcomes will be based on evidence of trading during the period of self-employment. Accountable Bodies or Delivery Partners (on behalf of Accountable Bodies) will track and record Self-employed Job Outcomes themselves and submit through the PRaP system (see Technical Note: PRaP).

Performance Measurement and Assurance

Introduction

- 159.** This section provides an overview of the delivery expectations relating to quality and performance, and the support that may be available from DWP.
- 160.** DWP is committed to very high standards of its Grant funded provision and encourages continuous improvement.

Performance Expectations

- 161.** Performance will be measured against the Accountable Body's Profile Template and the Performance Measures as outlined below. Accountable Bodies shall deliver the Grant in accordance with the Agreed Objectives, and the performance of each Accountable Body shall be measured against the Performance Measures.

Performance Measures

- 162.** DWP expect Accountable Bodies to achieve the Performance Measures set out below. DWP will measure each Accountable Body's performance against these Performance Measures in accordance with a "Performance and Engagement Framework". This framework consists of a four staged approach to ensure the Grant delivers a good quality service in accordance with the Delivery Plan and Grant Cost Register, Grant Funding Agreement and Managing Public Money principles. The Grant Cost Register uses a performance curve created by analysts to reflect and account for the differing time periods across the Delivery Period. This performance curve will be used to help track Accountable Bodies performance against the Performance Measures on a monthly and quarterly basis, using the Performance and Engagement Framework. DWP shall review and readjust the performance curve if appropriate. When commissioning or contracting for delivery, it is important for Accountable Bodies to allow for performance to build up against these Performance Measures over the first 6 months of the Delivery Period whilst the tracking of Accountable Bodies' performance and Engagement Framework are not fully introduced.
- 163.** DWP acknowledges that the future health of the economy and circumstances of Participants are major factors in contributing to the level of performance. The most important success factor for Connect to Work, as it is for any programme, is to what extent it delivers an employment impact beyond what would have happened without the support – this is estimated through the evaluation as described in the Evaluation and Local Learning section below; the highest impact will be achieved by delivering the most effective support that is focused on the most appropriate groups. Therefore, the Performance Measures are set to help manage delivery in a timely way that is likely to achieve most impact. With that context the agreed Performance Measures may be adjusted by DWP at the Annual Review (see the 'Annual Grant Review' section for more information).

- 164.** Alongside regular engagement with Accountable Bodies to understand what is going well and what is proving challenging, DWP will review performance through analysis of MI returns, and any other automatic MI received by DWP, against the following Performance Measures on a monthly basis and will co-ordinate appropriate performance support.

PERFORMANCE MEASURES

Job Start

- At least 50% of total Programme Starts to achieve first earnings ('Out-of-Work' Participants).
- To be achieved up to 456 calendar days from the Participant's programme start date, or if extended up to 638 calendar days from the start date.

Note that first earnings are **any** allowable earnings recorded by HMRC PAYE data.

Outcomes

See Technical Note:
Job Outcomes

- At least 40% 'Out-of-Work' Participants of total Programme Starts to achieve a Lower Threshold Job Outcome. Earnings threshold calculation (9hrs x 13 weeks x NLW) and Self-employed equivalent measured over 13 cumulative weeks.
 - To be achieved up to 456 calendar days from the Participant's start date, or if extended up to 638 calendar days from the start date.
 - At least 29% 'Out-of-Work' Participants of total Programme Starts to achieve a Higher Threshold Job Outcome. Earnings threshold calculation (18 hrs x 26 weeks x NLW) and Self-employed equivalent measured over 26 cumulative weeks.
 - To be achieved up to 456 calendar days from the Participant's start date, or if extended up to 638 calendar days from the start date.
 - At least 80% of 'In-Work' Retention Support Participants to achieve a Higher Threshold Job Outcome (higher only – Employed and Self-employed Job Outcomes). Earnings threshold calculation (18 hrs x 26 weeks x NLW) and Self-employed equivalent measured over 26 cumulative weeks.
 - To be achieved up to 365 calendar days from the Participant's start date.
-

Evaluation and Local Learning

- 165.** To provide accountability for the expenditure committed on Connect to Work (proportionate to its scale as a major programme), DWP aims to establish evidence on the impact, value-for-money and delivery of Connect to Work. There is also a need to provide learning which will support DWP and Accountable Bodies to improve the delivery of Connect to Work and future interventions.
- 166.** DWP therefore plans to conduct a national evaluation of Connect to Work and may commission a Third Party evaluation organisation to undertake this or elements of it. Accountable Bodies and Delivery Partners are required to actively participate in the national evaluation and to support the engagement of all types of research participants which may include potential programme participants (from receipt of an 'Expression of Interest' onwards), programme Participants, staff at Accountable Bodies and Delivery Partners, employers, wider stakeholders (such as staff at Supporting Organisations or support services involved in integrated support) and other research participant groups identified by DWP, with the national evaluation. As part of supporting the engagement of research participants, Accountable Bodies and Delivery Partners will be required to take actions to enable surveys and qualitative research (for example, providing sample records, promoting opportunities to participate in research and providing access for site visits).
- 167.** Accountable Bodies will be required to securely provide personal data to enable DWP and any Third Party evaluation organisation appointed by DWP to conduct research and analysis as part of the national evaluation, including by complying with MI requirements (see the Management Information and Reporting Requirements section) and by taking additional actions where requested to collect and store sample details (such as identifiers and contact details) for all types of research participants (as described in the Evaluation and Local Learning section) and share these sample details with DWP and/or a DWP appointed Third Party evaluation organisation. Accountable Bodies must ensure that the data recorded and provided is of a consistently high standard of accuracy, completeness and timeliness.
- 168.** The national evaluation will focus on estimating impact on sustained employment, earnings, health and wellbeing outcomes for Participants, identifying causal factors that have resulted in impacts, undertaking a cost-benefit analysis and assessing the process of delivery. In order to manage research participant burden, as DWP will be conducting surveys with programme participants as part of the national evaluation, Accountable Bodies should discuss with DWP the timing and implications prior to commencing survey fieldwork with this group as part of any local research or evaluation activities that they may conduct.

- 169.** Accountable Bodies may receive further guidance on avoiding duplication of effort with the national evaluation and minimising the burden on research participants as part of any local research or evaluation activities that Accountable Bodies may conduct (see Technical Note: General, for further information regarding the requirement to gather local learning, which may include conducting a proportionate local process evaluation).
- 170.** DWP will provide advice and guidance to support Accountable Bodies and Delivery Partners with their commitments to actively participate in the national evaluation, including on providing data for evaluation purposes.

Fraud

- 171.** Accountable Bodies should ensure that Delivery Partners are genuine, appropriately qualified, and capable of delivering the required Funded Activities, and that the use of the Delivery Partner by the Accountable Body represents value for money. This may include the Accountable Body carrying out due diligence, pre-procurement checks, ongoing performance management of all Delivery Partners and the Accountable Body making payments in arrears to all Delivery Partners.
- 172.** Accountable Bodies should ensure contractual arrangements with Delivery Partners support appropriate auditing and assurance, with information and access rights included within all arrangements (as per clause 8.2. of the Grant Funding Agreement).
- 173.** If the Accountable Body knows or suspects, or should know or suspect, that fraudulent activity of any kind has taken place in connection with Connect to Work or the Grant, the Accountable Body must notify DWP immediately providing full details of the suspected fraudulent activity, including but not limited to, the nature, the scope, and the total monetary value of the activity to be reported.

VAT

- 174.** The amount specified in the Grant Funding Letter and the Grant Funding Agreement is the total amount that may be payable by DWP, and no additional amount shall be payable to account for any VAT that each Accountable Body may have to pay to HMRC (or such equivalent body).
- 175.** If the Accountable Body incurs VAT from Third Party suppliers, they must claim this back themselves. VAT costs should not be passed on to DWP and VAT costs do not constitute Allowable Costs.
- 176.** If VAT is incurred and cannot be reclaimed, Accountable Bodies would be expected to absorb this cost. The amount specified in the Grant Funding Letter and the Grant Funding Agreement is the total amount payable by the DWP, and no additional amount shall be payable to account for any VAT that each Accountable Body may have to pay to HMRC (or such equivalent body).

Data Handling and Security

- 177.** Each Accountable Body must ensure that in carrying out the Funded Activities, it complies with all of its obligations under the UK General Data Protection Regulation (UK GDPR) and Data Protection Act 2018 in relation to processing personal and special category data. In the event of a Freedom of Information request being submitted, the Accountable Body will be responsible for all aspects that relate to delivery of the programme. However, DWP will be responsible for requests in relation to strategic intent and policy.
- 178.** Accountable Bodies must acknowledge and act in accordance with their duty of care to protect vulnerable adults enrolled on the programme during all activities related to it. This includes ensuring that all Accountable Body staff, Delivery Partners and employers are appropriately trained and that sufficient background checks have been carried out to safeguard all who engage with the Connect to Work service (irrespective of the stage of interaction) in line with the Accountable Body's existing safeguarding policy for vulnerable adults.
- 179.** Accountable Bodies should ensure that information is protected together with IT systems, equipment and processes which support its use. Accountable Bodies must demonstrate an appropriate level of security, for example ISO/IEC27001 standard.
- 180.** Accountable Bodies should be aware that DWP will be operating to its pre-existing data handling and document retention policies.

Annual Grant Review

- 181.** DWP will carry out an Annual Review of the Connect to Work Grant. DWP will consider the delivery of the Funded Activities against the Delivery Plan and Profile Template.
- 182.** Each Annual Review may result in DWP deciding that (for example, this is a non-exclusive list):
- The Funded Activities and the Grant Funding Agreement should continue in line with existing plans.
 - There shall be an increase or decrease in the Connect to Work Grant for the 12 month period following the relevant annual review.
 - The Agreed Objectives shall be re-profiled and agreed.
 - The Accountable Body shall provide DWP with a draft Remedial Action Plan (as defined in the Grant Funding Agreement) setting out the steps the Accountable Body will take to improve delivery of the Funded Activities.
 - DWP shall recover any Unspent Monies (as defined in the Grant Funding Agreement).
 - The Grant shall be terminated in accordance with the Grant Funding Agreement.
 - There has been an Event of Default (as defined in the Grant Funding Agreement).
 - Any other action DWP deems should be taken in the circumstances.

Timeline

- 183.** DWP expects a phased approach towards implementation, recognising multiple factors could impact when Programme Starts may commence in a Delivery Area, such as:
- experience in delivering Supported Employment,
 - availability of practical commercial approach to set in place Delivery Partners,
 - experience in producing Delivery Plans, and
 - competing local priorities.
- 184.** DWP will work to agree phasing of implementation within set periods, using information in the Delivery Plans.
- 185.** Dates for submission of the Delivery Plan will be discussed individually with Accountable Bodies, following the issue of this guidance. Further information is set out in the Delivery Plan Guidance.
- 186.** Accountable Bodies can obtain Information and support regarding the Delivery Plan process by sending questions to DWP via the following inbox throughout the Delivery Plan process laenquiries.supportedemploymentprogramme@dp.gov.uk.
- 187.** DWP will aim to assess each Accountable Body's Delivery Plan timeously, but decisions may not be immediate, and Delivery Plans may need to be updated in an iterative process with DWP in light of discussions about the content. The Delivery Plan shall be appraised in accordance with the Delivery Plan Appraisal Process set out in the Delivery Plan Guidance document to ensure it meets the required standard for agreement. This is not a competition between areas to access Connect to Work funding.
- 188.** Once Accountable Bodies receive confirmation that their Delivery Plan has been agreed by DWP, a Grant Funding Agreement will be drawn up on substantially the same terms as those provided during the launch of Connect to Work. The Implementation Period will reflect the amount of activity required in each Delivery Area. DWP will make every effort to notify Accountable Bodies as early as possible in the event that the timeline needs to be adjusted.
- 189.** The Connect to Work timeline will involve the below steps (with additional detail set out in the Delivery Plan Guidance):
- Delivery Plan preparation period.
 - Delivery Plan closing date.
 - Grant Funding Agreement issued.
 - Funding Period confirmed.
 - Ongoing Implementation Period.

Annexes

Annex A – Glossary of Terms and Abbreviations

TERM	DESCRIPTION
Access to Work	Access to Work is a personalised discretionary grant which supports the recruitment and retention of disabled people in sustainable, paid employment, as further detailed in Annex C (Fit with National DWP Funded Programmes) of Technical Note: General.
Accountable Bod(y)(ies)	A lead authority within the defined Delivery Area, who will take overall responsibility as the Grant recipient for leading the implementation of Connect to Work across the Delivery Area.
Additional Delivery Area Member(s)	Means, where applicable, a member of the Delivery Area other than the Accountable Body.
Agreed Objectives	Means the Accountable Body's Profile Template as agreed by DWP and as set out in Annex 9 (Grant Cost Register) of the Grant Funding Agreement, and the Performance Measures set out at Annex 6 (Performance Measures) of the Grant Funding Agreement.
Allowable Costs	Means the expenditure incurred by the Accountable Body or an Additional Delivery Area Member during the Funding Period for the purposes of delivering the Funded Activities which either falls within the categories listed in the 'Allowable Costs Register' tab of the Grant Cost Register, or is listed in clause 5.2 of the Grant Funding Agreement, and complies in all respects with the eligibility rules set out in clause 5 of the Grant Funding Agreement.
Allowable Cost Register Cost Categories	Has the meaning as set out in the Technical Note: General.
Annual Review	The yearly review of the Grant to each Accountable Body carried out by DWP in accordance with clause 6 of the Grant Funding Agreement.
Delivery Area(s)	Means, where applicable, the geography within which the Accountable Body will deliver Connect to Work. The top tier authorities in each of the 43 Delivery Areas in England are set out in Annex D (Proposed Geographies) of this Grant Guidance.
Delivery Partner	A Third Party partner instructed by the Accountable Body to carry out any part of Connect to Work on behalf of the Accountable Body in the Delivery Area.
Delivery Period	Means in the lifecycle of Connect to Work, the period of time when the Accountable Body is in delivery of the provision, following the Implementation Period
Delivery Plan	The plan for the Delivery Area covering the full Funding Period setting out how the Accountable Body will deliver Connect to Work, in the relevant Delivery Area.

Delivery Plan Appraisal Process	Means DWP's Delivery Plan appraisal methodology set out in the "Delivery Plan Guidance" document (see Appendix A of the Grant Guidance), used to determine who should be grant recipients.
Delivery Plan Guidance	The supported documentation at Appendix A of the Grant Guidance, to support the development of Delivery Plans.
Disability / Disabled Person	Has the meaning set out in Annex B (Eligibility and Suitability) of this Grant Guidance.
Duplicate Funding	Has the meaning given in the Grant Funding Agreement
Economically Inactive / Economic Inactivity	People not in work and either not looking for work or not available to work.
Eligibility and Suitability Criteria	The criteria which must be met for a potential Participant to be eligible to receive support on Connect to Work, as further detailed in Annex B (Eligibility and Suitability) of this Grant Guidance.
Employed	Means where there is a contract of employment between an individual and an employer, the individual is paid through Pay as You Earn (PAYE) with tax and Class 1 National Insurance contributions automatically deducted, and the individual has access to employee benefits.
Employed Job Outcome	Means a Lower Threshold Employed Job Outcome or a Higher Threshold Employed Job Outcome.
Employment Specialist	The practitioners, employed or engaged by an Accountable Body and/or an Additional Delivery Area Member, who carry out all phases of employment support on Connect to Work, who are responsible for supporting people back into paid employment and supporting those in employment to stay in work.
Expression of Interest	The application which potential participants will need to complete to enable the Accountable Body or Delivery Partner to undertake a preliminary eligibility check and to manage the case through the Participant journey.
Fidelity	Adherence to the specific Supported Employment model.
Fidelity Assessment	A review of current practice to measure how closely the Accountable Body or Delivery Partner is adhering to the models of Supported Employment (whether IPS or SEQF) and to drive continuous improvement.
Financial Year	Means from 1 April to 31 March.
Funded Activities	Means the activities as set out in Annex 4 (Funded Activities) of the Grant Funding Agreement and further described in the Funded activities section of the Guidance, and the Delivery Plan (Annex 8 (Accountable Body's Delivery Plan) of the Grant Funding Agreement).
Funding Period	The period in which DWP intends to make funding available to Accountable Bodies. The period for each Accountable Body will start on the Commencement Date (as defined in the Grant Funding Agreement) and end 31 March 2030. As delivery commencement is staged the exact Funding Period for each Delivery Area will be set out in the Grant Funding Agreement.

Grant	The sums DWP will pay to the Accountable Body in accordance with the conditions and provisions set out in the Grant Funding Agreement.
Grant Cost Register	Means the register in which costs are recorded for the Funding Period against Allowable Costs, aligned to Financial Years, and recorded in monthly planned expenditure profiles. A Grant Cost Register Template to use for this exercise has been issued as part of the Grant Guidance and Delivery Plan documentation.
Grant Formula	Estimates of shares of participants and shares of funding for each Accountable Body are calculated using a specific formula for Connect to Work, based on set criteria. The estimates shared in the Grant Guidance are for Programme Starts in a financial year at peak and unit cost over the lifetime of the programme. These estimates are indicative only, and volumes of Participants and amount of funding allocated to each Accountable Body are determined by the Accountable Body's Delivery Plan. For the avoidance of doubt, Connect to Work is not a formula grant.
Grant Funding Agreement	The grant funding agreement to be entered into by DWP and the Accountable Body for each Delivery Area.
Grant Funding Letter	Means the letter DWP issued to the Accountable Body, a copy of which will be set out in an annex of the Grant Funding Agreement.
Grant Guidance	Means the Connect to Work Grant Guidance as amended from time to time unilaterally by DWP by written notice.
'Hidden Unemployment'	People who are not actively looking for work but who are willing and able to work, and therefore are not counted as part of the official unemployment statistics.
Higher Threshold Employed Job Outcome	Means when a Participant receives gross earnings (excluding any Non-Qualifying Earnings) in at least the amount described in Technical Note: Job Outcomes and DWP identifies such earnings using HMRC PAYE data.
Higher Threshold Job Outcome	Means a Higher Threshold Employed Job Outcome or a Higher Threshold Self-employed Job Outcome as relevant to the circumstances.
Higher Threshold Self-Employed Job Outcome	Means when: a) Participant is Self-employed for the period described in Technical Note: Job Outcome; and b) the Accountable Body can evidence that period of Self-employment. c) Any period of Self-employment can only be counted once regardless of whether the Participant has one or multiple Self-employed occupations during that period.

Implementation Period	The period assigned to activity to prepare for delivery of Connect to Work, for example, Delivery Plan preparation, procurement, recruitment, and marketing. For reimbursement of Allowable Costs incurred, as a guide a period of around 6 months preceding the start of the Delivery Period. Accountable Bodies are encouraged to discuss with DWP where their implementation arrangement may differ from this.
Implementation Support	During the Implementation Period, DWP will provide support to the Accountable Bodies in the preparation for 'go-live' as detailed in Technical Note: General.
Integrated Care Systems	When local partners – the NHS, councils, voluntary sector and others – work together, they can create better services based on local need. Integrated care systems, (ICSs) have been set up to make this happen. Their aim is to improve health and care services – with a focus on prevention, better outcomes and reducing health inequalities. The 42 ICSs in England are local partnerships that bring health and care organisations together to develop shared plans and joined-up services. They are formed by NHS organisations and upper-tier local councils in that area and also include the voluntary sector, social care providers and other partners with a role in improving local health and wellbeing.
Individual Placement and Support	A model of Supported Employment that helps people accessing health services find work to aid their recovery.
'In-Work' Retention Support	Support to help retain existing jobs or find new employment opportunities.
'In-Work' Retention Support Participant	Employed/Self-employed Participants at risk of falling out of work into inactivity without the support of Connect to Work.
Job Outcomes	Means both or either of Employed Job Outcomes and Self-employed Job Outcomes as relevant to the circumstances.
Job Start	Has the meaning below: • 'Out-of-Work' Participants – start of first recorded earnings in HMRC PAYE data notified to DWP for the Participant. Earnings must be notified and paid during the Qualifying Period. • 'In-Work' Retention Support – the start date on Connect to Work. • Self-employment – the date when a Participant completes one day's Self-employment within any seven-day period.
Lower Threshold Employed Job Outcome	Means when a Participant receives gross earnings (excluding any Non-Qualifying Earnings) in at least the amount described in Technical Note: Job Outcomes and DWP identifies such earnings using HMRC PAYE Data.
Lower Threshold Job Outcome	Means a Lower Threshold Employed Job Outcome or a Lower Threshold Self-employed Job Outcome as relevant to the circumstances.

Lower Threshold Self-employed Job Outcome	Means when: - Participant is Self-employed for the period described in Technical Note: Job Outcomes; and - the Accountable Body can evidence that period of Self-employment. Any period of Self-employment can only be counted once regardless of whether the Participant has one or multiple Self-employed occupations during that period.
Management Information	Specified data and information on performance or Participant types, or potential participants, submitted by the Accountable Body (known as the Management Information returns).
Match Funding	Means any contribution to the Funded Activities from a Third Party to the Accountable Body or an Additional Delivery Area Member to meet the balance of the Allowable Costs not supported by the Grant.
Maximum Sum	Means the maximum amount of the Grant set out in the Grant Funding Letter, DWP will provide to the Accountable Body for the Funded Activities, subject to clause 27 of the Grant Funding Agreement.
Month	Means a calendar month in the Funding Period. Monthly shall be interpreted accordingly.
Non-Qualifying Earnings	Non-Qualifying Earnings means: any and all earnings paid, paid to a Participant prior to the relevant Programme Start; or any income other than Qualifying Earnings which has been included in the HMRC PAYE Data and which has been paid to a Participant. See Technical Note: Non-Qualifying Earnings for more detail.
'Out-of-Work' Participant	A Participant who is not employed or Self-employed at the time they start Connect to Work.
'Out-of-Work' Support	Support to help find a suitable job and sustain work.
Participant(s)	A person who meets the Eligibility and Suitability Criteria for Connect to Work, agrees to participate in the programme and a Programme Start is recorded.
Performance Measures	Means the agreed performance measures as set out in the Performance Measures section of this Grant Guidance.
Performance and Engagement Framework	Means the approach to performance measurement as detailed in the Technical Note: General.
Profile Template	Means the 'Out-of-Work' and 'In-Work' Participants per month as recorded in the Participants tab (which is allocated from the Forecast monthly Participant numbers recorded in the Volumes tab) of the Grant Cost Register across the Funding Period (as set out at Annex 9 (Accountable Body's Grant Cost Register) of the Grant Funding Agreement).

Programme Starts	The point at which the Participant will have started on Connect to Work, being: a) the point of completion of the first vocational profile meeting (i.e., the one scheduled at the initial meeting); b) there being a signed initial Vocational Action Plan, agreed following the completion of the initial vocational profile meeting; and c) the start has been notified to DWP.
Provider Referrals and Payments (PRaP)	An Oracle based system developed for DWP which enables DWP to track the customer journey of Participants and their Job Outcomes.
Quarter	Means each consecutive period of 3 calendar months during the Funding Period. Quarterly shall be interpreted accordingly.
Regional Engagement Lead	A DWP member of staff responsible for dedicated support to each Accountable Body throughout both implementation and delivery phases of Connect to Work.
Self-employed	Means where someone runs their business for themselves and takes responsibility for its success or failure. They carry out a trade, profession or vocation and normally report their income and pay tax and Class 2 National Insurance contributions through self-assessment, or Construction Industry Scheme (CIS). Self-employed workers are not paid through PAYE, and they do not have the rights and responsibilities of an employee ¹¹ , and Self-employment shall be construed accordingly.
Self-employed Job Outcome	Means a Lower Threshold Self-Employed Job Outcome or a Higher Threshold Self-Employed Job Outcome.
Special Customer Records	Means certain customer records of a sensitive nature which are subject to restrictions and special handling arrangements to ensure confidentiality. For example, this can include individuals who are, for example: • transsexual • transgender • prominent national figures; or • people at risk of violence
Supported Employment	The 'place train and maintain' employment approach using the five-stage model to help people move into and retain work as described in Technical Note: Supported Employment Delivery Model.
Supported Employment Quality Framework	SEQF links the five basic principles of Supported Employment (client engagement, vocational profiling, job finding, engagement, on and off job support) by improving services for vulnerable job seekers, employees, and their employers.

¹¹ www.gov.uk/employment-status/employee

- Employment status: Employee - GOV.UK
- Employment status (worker, employee, self-employed, director or contractor) affects employment rights and employer responsibilities in the workplace

Supporting Organisations	A broad range of supporting organisations (as detailed under Identification and Introduction to the programme) will play a crucial role in generating interest and supporting potential participants.
Technical Note	Documentation that supports Accountable Bodies and supplements the Grant Guidance by providing lower level detail on practicalities. These include: • Technical Note: General • Technical Note: Supported Employment Delivery Model • Technical Note: Job Outcomes Additional Technical Notes will be provided in line with the schedule detailed in Technical Note: General.
Third Party	Any person or organisation other than the Accountable Body or DWP, and any government department other than DWP.
Unallowable Costs	Means expenditure incurred by the Accountable Body or an Additional Delivery Area Member which is not Allowable Costs and as set out in clauses 5.3 and 5.4 of the Grant Funding Agreement.
Vocational Action Plan	A live document containing a Participant's vocational profile and job/educational experiences.

Abbreviations

ABBREVIATION	DESCRIPTION
AF	Armed Forces
CV	Curriculum Vitae
DWP	Department for Work and Pensions
GDPR	General Data Protection Regulation
GFA	Grant Funding Agreement
GP	General Practitioner
HM's	His Majesty's
HMRC	His Majesty's Revenue and Customs
IAG	Information, Advice and Guidance
ICS	Integrated Care Systems
IPS	Individual Placement and Support
IPS-AD	Individual Placement and Support for Alcohol and Drug Dependence
IPS SMI	Individual Placement and Support for people with Severe Mental Illness
IPSPC	Individual Placement and Support in Primary Care
ISO/IEC 27001	International Organisation for Standardization/ International Electrotechnical Commission 27001
IT	Information Technology
LAs	Local Authorities
LSE	Local Supported Employment
MAPPA	Multi Agency Public Protection Arrangements
MI	Management Information
NHS	National Health Service
NLW	National Living Wage
OHID	Office for Health Improvement and Disparities'
PRaP	Provider Referrals and Payments
REL	Regional Engagement Lead
RTI	Real Time Information
SCR	Special Customer Records
SE	Supported Employment
SEQF	Supported Employment Quality Framework
SPOC	Single Point of Contact
VAT	Value Added Tax

Annexes

Annex B – Eligibility and Suitability

Definition of Participant Groups

- 190.** Accountable Bodies are responsible for confirming the i) eligibility criteria (which is a factual assessment); and ii) the suitability criteria (which requires judgement of the individual's circumstances), for all Participants. In confirming eligibility, the Accountable Body will be required to confirm with DWP that the participant is already being supported by a relevant DWP programme for example, Restart.
- 191.** Eligible participants must be a disabled person, or belong to one of the specified disadvantaged groups:
- Have a disability as defined in section 6 of the Equality Act 2010 or the Social Model of Disability.
 - Meet the definition of one of the specified disadvantaged groups with additional multiple and complex barriers that would benefit from support;
- 192.** The specified groups are as follows:
- An offender (someone who is serving a community service) or ex-offender (someone who has completed a custodial or community sentence).
 - A carer.
 - An ex-carer.
 - A homeless person.
 - A former member of His Majesty's (HM) Armed Forces (AF), a member of HM AF reserves, or a partner of current or former Armed Forces personnel.
 - A person for whom a drug or alcohol dependency, including a history of dependency, presents a significant barrier to employment.
 - Care experienced young person or a care leaver
 - A refugee, a resettled Afghan.
 - A person on the Ukrainian scheme.
 - A victim/survivor of domestic abuse.
 - Young people identified as being involved or at risk of being involved in serious violence.
 - A victim of modern slavery.
- 193.** Definitions for each of the groups are set out at the end of this Annex.

Eligibility Criteria

- 194.** People in these participant groups (as defined in paragraph 191-192) must also meet the following additional criteria to be eligible for Connect to Work:
- They must not currently be doing any paid work and would be available to start a suitable job (applies only to participants who are not working), or are at risk of losing work (retention participants only).
 - Should have been employed continually for at least 3 months before starting Connect to Work, (retention participants only)*.
 - Are of Working Age, aged 16 or more in Wales.
 - Have the right to work in the United Kingdom¹².
 - Have the right to live in the United Kingdom and are resident in England or Wales.
 - Do not belong to a group which has no entitlement to public funds¹³.
 - Is not on a DWP employment programme (see Technical Note: General, Annex C for more detail).
- 195.** For individuals on zero-hour contracts who are looking to access the ‘In-Work’ Retention Support strand of Connect to Work, the 3 month paid work criteria does not need to have taken place for a continuous period of 3 months. Any spell of employment within 3 months before accessing support will be acceptable. The potential participant will need to be in paid employment at the point of accessing Connect to Work. If they drop out of work whilst on Connect to Work, the same process will follow as for when this occurs for those in work.
- 196.** For those considered for the offer of in work retention support, we would expect that they had been in work for at least 3 months so that the employer has had time to have completed their usual induction of new staff and had a chance, for example, to put in place appropriate adjustments. It is, however, acceptable to offer support to individuals who have been employed for shorter periods where the Accountable Body judges that would be appropriate.

¹² [Prove your right to work to an employer: Overview - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/prove-your-right-to-work-to-an-employer-overview)

¹³ [Public funds - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/public-funds)

Suitability Criteria

- 197.** If all the above eligibility requirements are met, the prospective participant must also meet the suitability criteria. To be suitable for Connect to Work, eligible people must meet at least one of the employment situation criteria and at least one of the ‘would benefit from Connect to Work’ situation suitability criteria, set out below.
- 198.** The primary focus for the programme will be individuals who are not required to seek work as a condition of benefit receipt (who have often been overlooked for employment support). We’d expect appropriate participants to have never worked or to have not worked for around 6 months or more. It will also be available for those who are required to seek work but whose needs are best met by Supported Employment. It will also be available for those same groups where someone is in precarious employment and needs additional support to sustain employment.

- 199.** The suitability criteria are:

Individuals must meet at least one of the following employment situations.

- **Economically inactive or unemployed:** Person has not worked for around 6 months due to their disability, long term health condition or disadvantages and feel they need comprehensive tailored employment support to help them to identify the right roles for their needs and to engage in effective job search towards work.
- **Employed but risk of dropping out of work:** Person is working/Self-employed for at least 3 months and is struggling to sustain employment due to their disability, long term health condition or disadvantages. However, it is acceptable to offer support to individuals who have been employed for shorter periods where the Accountable Body judges that would be appropriate.
- **Maintaining work:** Person has never been in employment or a track record of struggling to retain jobs/sustain employment due to their disability, long term health condition or disadvantages.

- 200.** Individuals must also meet at least one of the following, ‘would benefit from Connect to Work’ situations:

- **Comprehensive tailored help:** Person is unlikely to be able to move into/retain paid work without very frequent, comprehensive and tailored support above and beyond standard provision (e.g. IAG, CV & application support) or other national provision including Restart.
- **Adaptability:** Person has previously, or is expected to, struggle with learning new skills or adapting to new environments due to their disability, long term health condition or disadvantages.
- **Integration:** Person needs employment support that is integrated with support for their other needs e.g. health services, probation, social care.

- **Job role and workplace:** Person will need employer flexibility to tailor the role and/or workplace to support with their disadvantages or disability or health condition.
- **Sustained work:** Person requires/will require significant support to retain work over and above standard reasonable adjustments.

- 201.** References to disability or disadvantages in the suitability criteria set out above should be read as referring to the relevant Participant groups set out below.
- 202.** If the individual meets at least **one** of the criteria in each of the situation categories set out above and the individual is identified as motivated to work, they understand the Connect to Work offer and are willing to engage with Connect to Work, then they are eligible and suitable for Connect to Work. Connect to Work is a voluntary programme so individuals must be motivated to work and agree to volunteer for the programme.

See further below for a map detailing the above process.

Definitions and Descriptions of the Participant Groups

Disabled People

- 203.** Definition of the disability group is:
- A disabled person as defined under section 6 of the Equality Act 2010; or
 - A person considers themselves disabled under the Social Model of Disability.
- 204.** Under the Equality Act 2010 a person has a disability if (in summary):
- they have a **physical or mental impairment**; and
 - the impairment has a **‘substantial’** and **‘long-term’** adverse effect on
 - their ability to carry out normal day-to day activities’. ‘substantial’ is defined as more than minor or trivial, e.g.it takes much longer than it usually would to complete a daily task like getting dressed.
 - **an impairment has ‘long-term’ effect if:**
 - (a)** it has lasted for at least 12 months,
 - b)** it is likely to last for at least 12 months, or
 - c)** it is likely to last for the rest of the life of the person affected.

- 205.** The Social Model of Disability defines disability as an individuals' experience of attitudinal and practical barriers to employment which stem from an impairment. In summary this is:
- **Impairment:** An injury, illness, or congenital condition that causes or is likely to cause a long-term effect on physical appearance and / or limitation of function within the individual that differs from the commonplace.
 - **Disability:** The loss or limitation of opportunities to take part in society on an equal level with others due to social and environmental barriers.

Detailed definition of Social Model of Disability

- 206.** The Social Model of Disability makes an important distinction between 'impairment' and 'disability'.
- 207.** The Social Model of Disability recognises that people with impairments are disabled by barriers that commonly exist in society. These barriers include negative attitudes, and physical and organisational barriers, which can prevent disabled people's inclusion and participation in all walks of life.
- 208.** According to the Social Model of Disability, impairment is what has historically been referred to as a "disability" or a health condition. For many (but not all) disabled people, their impairment is a significant part of their life and may form part of their personal identity. For some people, their impairment may require considerable management, and they may need ongoing medical support. Experience of impairment is personal. Everyone's experience is different. That experience is always valid and always important.
- 209.** Disability by contrast is the inequality, disadvantage, disempowerment or discrimination which may affect people with impairments as a result of barriers to access and inclusion. For example, a staircase is a barrier to a wheelchair user; providing a lift removes that barrier. Disability is therefore something which affects people with impairments but is different from impairment. Disability is something which disables someone with an impairment. Barriers can be removed. If you remove the barrier then you remove the disability.

Disadvantaged Groups

- 210.** The definition and descriptions of Connect to Work disadvantaged groups are set out in the table below. Early access to intensive employment support helps prevent people in these groups becoming inactive. There is a distinction within disadvantaged groups between those underrepresented in the labour market and those that will have complex barriers. For example, veterans as a whole are not underrepresented in the labour market but there are some ex-armed forces veterans who will have complex barriers and will benefit from Connect to Work.
- 211.** Accountable Bodies will not have discretion to extend eligibility beyond these groups but will be able to prioritise specific groups in Delivery Areas, on the basis of need and fit with the programme.

DISADVANTAGED GROUP	DESCRIPTION
Ex-offender	A person who has completed a custodial or community sentence or who is serving a community sentence.
A carer or ex-carer	A person who provides (or has until recently provided) full or part-time unpaid care by looking after a family member or friend, who is infirm, disabled or seriously ill. They do not have to live in the same household. These people are called carers, but many would probably say they were just "looking after someone".
A homeless person	A homeless person, including a person with homelessness experience or currently at risk of homelessness, is someone who has encountered a period of having no accommodation available for their occupation, in the United Kingdom or elsewhere. It does not just refer to people who have experienced rooflessness/slept rough, but also those who have: • Lived in insecure housing (threatened insecure tenancies, eviction, domestic violence, or staying with family and friends known as 'sofa surfing') • Experienced houselessness (with a place to sleep but temporary, in institutions or a shelter) • Lived in inadequate housing (in caravans on illegal campsites, in unfit housing in extreme overcrowding)
Veterans Includes the following groups: • A former member of HM Armed Forces • A partner of current or former Armed Forces personnel • A member of the HM AF reserves	[While veterans and other members of the Armed Forces Community are included in this list and some will benefit from support, not all are disadvantaged.] A person who is a former member of His Majesty's (HM) Armed Forces (AF), their partners and armed force reservists (including volunteer reservists and regular reservists as set out below). To be classed as a veteran a person needs only to have served in HM AF for at least 1 day. A person who is a volunteer reservist. Voluntary reservists comprise: • the Royal Naval Reserve, • the Royal Marine Reserve, • the Territorial Army, and • the Royal Auxiliary Air Force, and A person who is a regular reservist. Regular reservists comprise: • the Royal Fleet Reserve, • the Army Reserve, and • the Royal Air Force Reserve. For the avoidance of doubt, the partners of armed force reservists are not eligible.

DISADVANTAGED GROUP	DESCRIPTION
A person for whom a drug or alcohol dependency, including a history of drug or alcohol dependency, is a significant barrier to employment	A person for whom a drug or alcohol dependency presents a significant barrier to employment. This can include drug or alcohol dependency in the past. This could include individuals at the start or end of their recovery journey. Individuals may be experiencing a lack of confidence to take forward work, require support to maintain recovery or need to address wider barriers that stem from substance misuse such as housing or financial issues.
A care experienced young person or a care leaver	A person who is defined as: - Care leaver – a care leaver is a person under 25 who has been in local authority (LA) care (e.g. residential or foster care) for a period of at least 13 weeks or more, or periods amounting in total to 13 weeks or more, since they were age 14, and ending after age 16. - Care experienced young people - A person with care experience has spent time within the local authority care system living in foster care or residential care.
A refugee	Refugee – a person who has been granted refugee status in the UK under paragraph 334 of the Immigration Rules made under section 3(2) of the Immigration Act 1971.¹⁴
A person on the Ukrainian scheme	A person who is living in the UK on one of the following Ukraine Scheme visas: - the Homes for Ukraine Scheme (including Welsh and Scottish super sponsorship schemes), - the Ukraine Family Scheme, or, - the Ukraine Extension Scheme. The Ukraine Permission Extension (UPE) scheme which will extend existing permissions for Ukrainians who are living in the UK under a Ukraine scheme visa for a further 18 months starting from March 2025
An Afghan resettler	Afghan resettler – A person who arrived in the UK legally via a safe and legal protection route set up in response to the situation in Afghanistan, including the Afghan citizens resettlement scheme, the Afghan Relocations and Assistance Policy and the Afghanistan Locally Employed Staff Ex-Gratia Scheme.

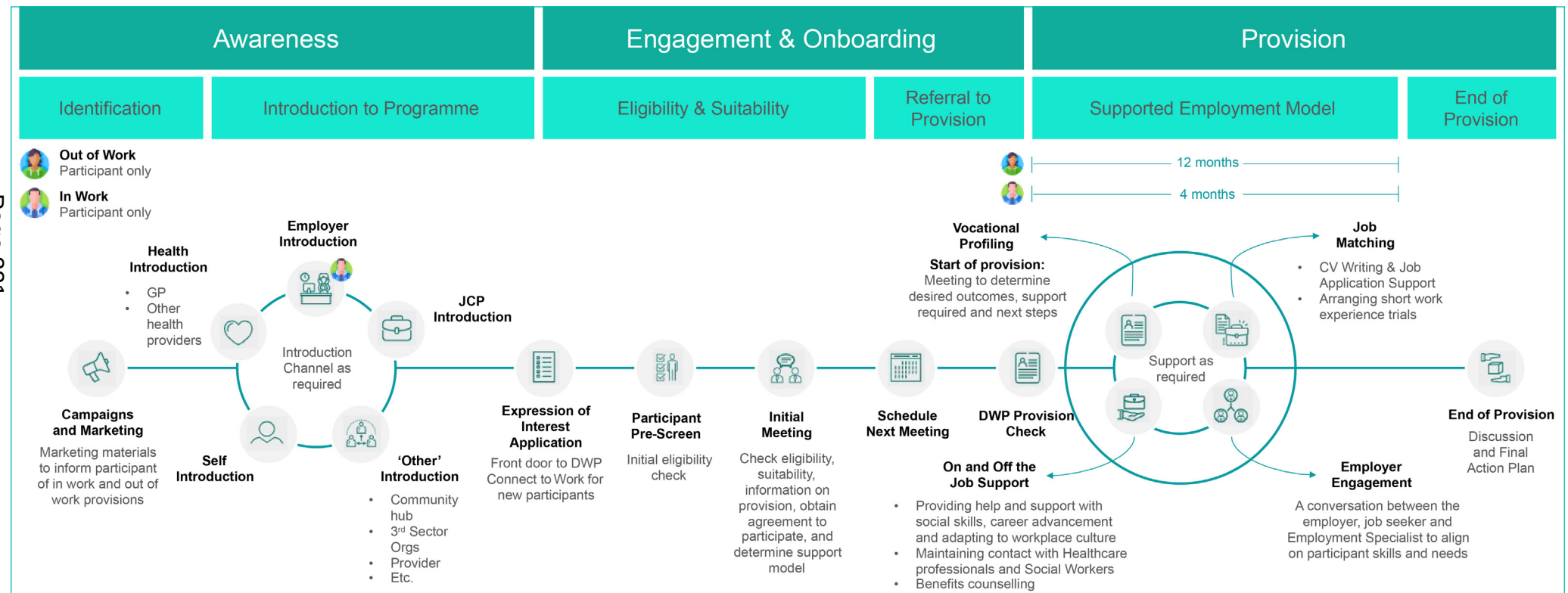
¹⁴ [www.legislation.gov.uk/ukpga/1971/77/section/3#:~:text=\(2\)The%20Secretary%20of%20State,United%20Kingdom%20of%20persons%20required](http://www.legislation.gov.uk/ukpga/1971/77/section/3#:~:text=(2)The%20Secretary%20of%20State,United%20Kingdom%20of%20persons%20required)

DISADVANTAGED GROUP	DESCRIPTION
A victim/survivor of domestic abuse	A person who meets the Domestic Abuse Act 2021¹⁵ definition of domestic abuse (summarised below). Definition of domestic abuse: ● Behaviour of a person (perpetrator of the abuse) towards another person (victim of the abuse) is domestic abuse if: both are aged 16 or over and are personally connected to each other, and the behaviour is abusive. Behaviour is abusive if it consists of any of the following: ● physical or sexual abuse; ● violent or threatening behaviour; ● controlling or coercive behaviour; ● economic abuse ● psychological, emotional or other abuse; and it does not matter whether the behaviour consists of a single incident or a course of conduct. A victim of domestic abuse includes a reference to a child who – ● sees or hears, or experiences the effect of, the abuse, and ● is related to perpetrator of the abuse and the victim of the abuse. Anyone can be a victim of domestic abuse, regardless of gender, age, ethnicity, religion, socio-economic status, sexuality, or background.
Young people identified as being involved, or at risk of being involved, in serious violence.	A young person (aged between 16-24) is classed as being involved, or at risk of being involved in serious violence if they are involved with specific types of crime such as knife crime, gun crime and areas of criminality where serious violence or its threat is inherent, such as county lines drug dealing.
A victim of modern slavery	A person who has been confirmed as a victim of modern slavery by having a positive ‘Conclusive Grounds’ decision issued by the relevant Competent Authority at the Home Office. The Home Office issues the decision letter to the adult concerned or to their appointed representative where applicable. Modern slavery is the illegal exploitation of people for personal or commercial gain. It covers a wide range of abuse and exploitation including human trafficking, slavery, servitude and forced or compulsory labour.

Annexes

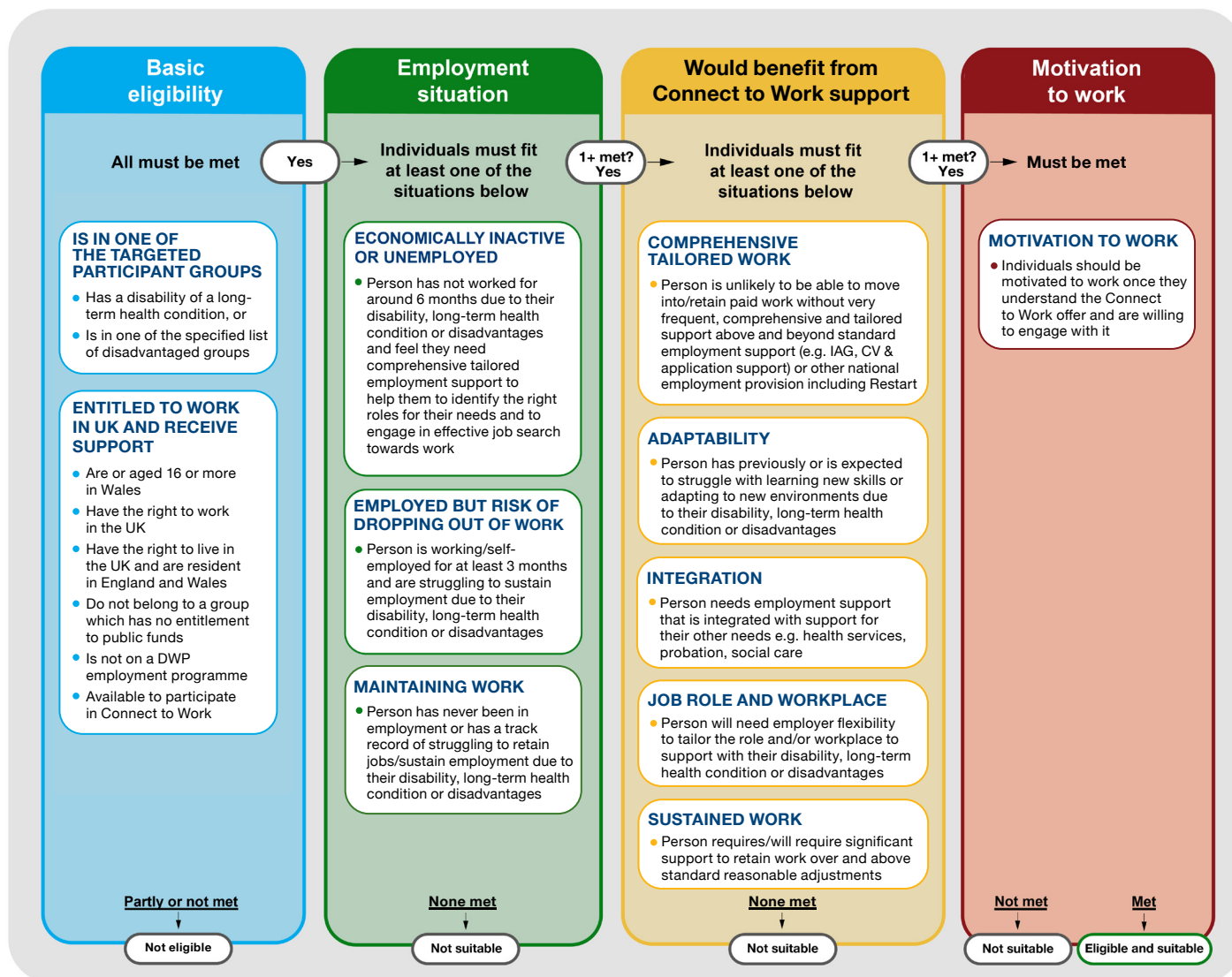
Annex C – Process Map

See image below for an overview of the Connect to Work process.



*Please use the zoom functionality to enlarge this image, if viewing this electronically.

The following describes the Eligibility and Suitability Criteria for Connect to Work that must be met by potential participants before they can access the programme.



*Please use the zoom functionality to enlarge this image, if viewing electronically.

Annexes

Annex D – Proposed Geographies

The following table lists each of the Connect to Work Delivery Areas, their Accountable Body and their constituent upper-tier and unitary councils.

ARDAL GYFLENWI	AELODAU ARDAL GYFLAWNI	CORFF SY'N ATEBOL
Wales – Mid Wales	Ceredigion County Council	TBC
	Powys County Council	
Wales – North Wales	Conwy County Borough Council	Denbighshire County Council
	Denbighshire County Council	
	Flintshire County Council	
	Gwynedd Council	
	Anglesey County Council	
	Wrexham County Borough Council	
Wales – South East Wales	Blaenau Gwent County Borough Council	TBC
	Bridgend County Borough Council	
	Caerphilly County Borough Council	
	Cardiff Council	
	Merthyr Tydfil County Borough Council	
	Monmouthshire County Council	
	Newport City Council	
	Rhondda Cynon Taf County Borough Council	
	Torfaen County Borough Council	
Wales – South West Wales	Vale of Glamorgan Council	Swansea Council
	Carmarthenshire County Council	
	Neath Port Talbot Council	
	Pembrokeshire County Council	
	Swansea Council	

Annexes

Annex E – Indicative Volume and Unit Cost Estimates by Delivery Area

- 212.** When Connect to Work is fully rolled out at the peak of delivery each Delivery Area will be delivering an appropriate share of peak annual Programme Starts nationally. The table below provides indicative estimates for Programme Starts for each the Connect to Work Delivery Areas in a financial year when peak Programme Starts are delivered. The table also provides indicative estimates of unit costs for the lifetime of Connect to Work. These indicative estimates were determined using the Grant Formula.
- 213.** The indicative Programme Starts and indicative unit costs are supplied here to illustrate the likely scale of Connect to Work and to support Accountable Bodies with planning a coherent service for their Delivery Area. In developing their Delivery Plan, Accountable Bodies should use the estimated peak starts as a guide to the level of delivery that they propose to work towards. In their Delivery Plan, Accountable Bodies should demonstrate how they intend to reach peak state and the expected Participant volumes. Accountable Bodies should also consider the funding required for delivery over the lifetime of the service based on the indicative unit cost, which includes ramp-up and ramp-down costs. As the distribution of spend on the grant-delivered service will be different from the distribution of starts, combining the unit cost with starts in a financial year will not provide an accurate figure for the amount of funding that would be received in a specific year.
- 214.** The Grant Formula estimates shares of total volumes and total funding. The Grant Formula has been designed to estimate volumes and funding in a consistent and transparent way, using the same publicly available data sources with Local Authority level data for all areas as far as possible. Shares of total volumes are estimated based on an area's working age population and demand indicators, which include the proportion who are economically inactive due to long-term sickness, disability employment gap, and measures of deprivation (for disadvantaged groups Participants). Shares of total funding are based on estimated volumes with cost adjustments to reflect variations in staffing and premises costs and the additional costs faced by rural areas. As the scale of delivery will depend on Delivery Plans, the indicative unit costs (relative to total funding levels) better express the Grant Formula's cost adjustments. Indicative estimates for the number of Programme Starts at peak and the overall unit cost are provided for information and to assist with the framing of planning. **They are not guaranteed. Funding and volumes for each Accountable Body will be agreed as part of the approved Delivery Plan and the Grant Funding Agreement.**

- 215.** The cost per Participant will vary by Delivery Area, reflecting area characteristics. The level of funding also reflects that the target groups cover individuals with a range of needs. Additionally, we would expect those ‘In-Work’ Retention Support Participants, supported to retain employment, to require less support than an ‘Out-of-Work’ Participant. Beyond the Grants to the Connect to Work Delivery Areas, the Connect to Work budget will also support central costs, including for example Implementation Support, Fidelity Assessment, and evaluation.
- 216.** This Grant Guidance invites the Accountable Bodies for Connect to Work Delivery Areas to develop a Delivery Plan. The funding, splits between different Participant types and profiles for the build-up of Participant volumes will be discussed between Accountable Bodies and DWP. The figures provided here are not a prejudgement of the outcome of those discussions.
- 217.** The build up to the peak of delivery will be agreed between DWP and Accountable Bodies. The pace of the ramp up will vary between Delivery Areas and this will affect the total volumes and total funding provided over the length of the programme.
- 218.** In the table below, the indicative Grant Formula estimates for Programme Starts in a financial year at peak and unit cost are rounded to the nearest 100.

Delivery Area	Indicative Programme Starts in a financial year at peak	Indicative unit cost over the lifetime of the programme
Wales	6,700	£3,700

Annexes

Annex F – Contacts and Support

Question-and-Answer Log

- 219.** Accountable Bodies can submit questions at any time whilst developing their Delivery Plan to their single point of contact for the programme at: laenquiries.supportedemploymentprogramme@dwp.gov.uk. DWP will maintain an anonymised question-and-answer log to manage and monitor all questions raised via any forum. A Frequently asked questions log will be developed and shall be regularly circulated directly to each Accountable Body.



Department
for Work &
Pensions



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for Work &
Pensions

Connect to Work Grant Guidance

Appendix B – Delivery Plan template

29 November 2024

To access Connect to Work Grant funding, Accountable Bodies are being asked to complete a Delivery Plan, setting out how they intend to use the funding and deliver the programme. The Delivery Plan should be completed in accordance with information contained in the Grant Guidance and technical notes, as set out below.

Since this is the first step in the Government's Get Britain Working Strategy, we are keen that your Delivery Plan not only captures information about your specific plans for delivery of the programme, but also starts a process of considering your wider strategy on work, health and skills, and how this support will fit within it.

Accountable Bodies are asked to develop their Delivery Plan in collaboration with local partners and particularly Additional Delivery Area Members (where appropriate). Plans will need to be agreed by both the Accountable Body and DWP before entering into a Grant Funding Agreement.

Capitalised terms and acronyms referred to in this Delivery Plan Template shall have the meanings given to them in the Grant Guidance or Grant Funding Agreement.

Please note, that when answering the following sections, you are doing so on behalf of your Delivery Area.

This Delivery Plan should be completed with reference to the following documents:

1. Connect to Work Delivery Plan Guidance
2. Connect to Work Grant Guidance
3. All applicable Technical Notes (see Technical Note: General, for a schedule of future Technical Notes)
4. Connect to Work Grant Cost Register

Section 1 – Contact information

The following information is to help support communication during this Delivery Plan process.

1.0 Name and address of the Accountable Body for your Delivery Area:	Denbighshire County Council
1.1 Please provide the following details for the Accountable Body:	
Single Point of Contact Name:	Gary Jones
Single Point of Contact Email:	Gary.wynjones@denbighshire.gov.uk

Single Point of Contact Phone:	
Role of Single Point of Contact:	Regional Programme Manager

Section 2 – Connect to Work delivery

Within this section, please set out your response to how you will deliver your service, who you will work with to deliver and integrate it, and how you will ensure you have a suitably qualified workforce (either in-house or via commissioning) in place, to deliver the Supported Employment model.

2.0 In the delivery of Connect to Work please indicate which delivery method you intend to use across your Delivery Area (Please select one option only)

In-house	Commissioned	Mixed (both in-house and commissioned) x
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2.1 Where a **mixed delivery method** is indicated, please provide details on the proportion and nature of how the model will be split. Is this by provision (IPS and SEQF)? Is it by geographical location? Is it by Participant group? etc.

2.2 Please detail your high-level plan for delivery which captures the key milestones and indicative timings for implementation activities. These could include:

- The date your team will be in place to start delivering the programme
- The date you will be ready to start receiving 'Expressions of Interest'
- Your anticipated timeframe for scaling up and the associated starts volumes
- The date you plan to be fully operational

Please attach a copy of **your draft project plan**, which shows your key milestones and timeline.

- The date your team will be in place to start delivering the programme
- The date you will be ready to start receiving 'Expressions of Interest'
- Your anticipated timeframe for scaling up and the associated starts volumes
- The date you plan to be fully operational

Capacity and Capability

Within this section, please provide details of the capacity and capability to deliver Connect to Work across your Delivery Area.

2.3 Please describe the capacity and capability to deliver Connect to Work across your Delivery Area.

Please include the key capacity and capability challenges you have and what further support you may need to help address these challenges. Please highlight any challenges across your whole Delivery Area.

2.4 Please provide details of how your project will be administered. Where possible, please describe the individual posts within the team(s) that will be delivering the project:

- How is the team set up to manage the project?
- What resources, expertise, skills, responsibilities and experience do they have?
- Will existing staff be employed, or will new staff be recruited (if recruited, how and when)?

Where you have indicated some, or all your delivery will be done in-house, please also provide the following details:

- Staff roles and responsibilities, including volumes.
- Recruitment plans and timelines, including any specific skills and knowledge needed for those roles

Please refer to job titles rather than the actual names of individuals.

Commissioned delivery

Where you have indicated that some, or all, of your delivery of Connect to Work will be commissioned, please provide the following:

2.5 A summary of the procurement process (including timeline) that will be followed to identify and appoint Delivery Partner(s), including how the process will ensure the following is met:

- Requirements of the Grant Guidance
- Conditions of the Grant Funding Agreement
- Support for all eligible and suitable Participants
- Full coverage across your Delivery Area

2.6 If you intend to appoint a managing agent to oversee the implementation and delivery of Connect to Work, please provide details below, including your rationale for this decision.

2.7 Please provide details of the market assessment and engagement strategy for your commissioning activity.

2.8 Are there any Delivery Partners that have already been identified or commissioned? Please provide details of how they were identified and commissioned and how you plan to utilise existing contracts, if applicable.

Section 3 – Connect to Work design

Design principles

You will recognise from the Grant Guidance the importance of adhering to the principles and the five stages of the Supported Employment model for both IPS and SEQF. This section is to understand how you will design your overall programme in line with these principles.

3.0 Please provide a clear description of your proposed Connect to Work offering and how this meets the requirements set out in the Grant Guidance.

3.1 Please provide details of how you intend to ensure the support provided to Connect to Work Participants, adheres to the fundamental principles of Supported Employment, Individual Placement and Support (IPS) and Supported Employment Quality Framework (SEQF). This should include:

- supporting people into competitive employment in the open labour market.
- ensuring Participants receive commensurate pay for work carried out.
- providing appropriate support through all the stages of the five-stage process.

(See Technical Note: Supported Employment Delivery Model for more information)

3.2 Please provide details on how you will engage with local employers, to support them to develop more inclusive employment practices, ensuring their jobs are accessible to Connect to Work Participants and individuals are supported to sustain those roles.

Local Employer Engagement Strategy/plan

Identification of Participants

Identification of the appropriate volumes of eligible and suitable Participants is an important element of Connect to Work, with the programme being targeted at the right people, at the right time and based on individual circumstances. Take up of Connect to Work will be promoted and marketed to citizens to help identify eligible/suitable potential participants in your Delivery Area.

3.3 Please provide details of how you will generate interest, including marketing of Connect to Work to meet your expected profile volumes?

Marketing and Engagement Strategy

3.4 Which introduction channels would you expect 'Expressions of Interest' to come from and how do you expect to monitor and manage these routes in live running to ensure they remain effective throughout the grant period?

List of key introducers.
Job Centre

3.5 If you propose to prioritise specific groups of people, please describe your rationale and describe how you will do so within the agreed Eligibility and Suitability Criteria.

Participant journey

This section is to outline how you will support and manage Participants through the Connect to Work process.

3.6 Please provide details on how you will provide tailored support for each Participant, as described in the Grant Guidance?

3.7 How will you safeguard Participants, including those who are subject to Multi-Agency Public Protection Agency (MAPPA) arrangements and embed the public sector equality duty into the design and operation of your service e.g. through appropriate ongoing equality impact analysis?

Estimated costs and volumes Please complete all sections of the Grant Cost Register (GCR), which has been supplied separately. The GCR is a service costing tool which we are asking Accountable Bodies to use in planning and costing their Supported Employment provision. Guidance on completing the GCR has been included within the model. DWP Commercial Finance are also available to provide general support on completing it where requested. DWP recognises that costs may change during the live running of the programme and any changes can be discussed as part of the annual review.
3.8 Please embed the completed Grant Cost Register
Risk An understanding of your risks involved in delivering Connect to Work and the need for having effective systems in place to manage them, is important to enable the delivery of Connect to Work, from implementation to live running.
3.9 Please describe the key risks and mitigations, including operational, commercial and financial, that could affect Connect to Work delivery.
3.10 Please detail your approach to fraud risks that could affect your delivery and how you might mitigate these.

Section 4 – Governance

Outline of governance approach & experience

Within this section, please provide details of the governance arrangements for Connect to Work across your Delivery Area.

4.0 Please summarise the governance structure you will have in place across your Delivery Area, including how any advisory panels or associated partnership groups are made up. Please specify whether these are pre-existing structures, new structures, or whether contingency arrangements are temporarily being put in place. Please explain how these arrangements will be sustained through the life of the programme. Please also include details of any challenges you foresee in relation to the governance of Connect to Work and any support you may need to develop your governance structures.

4.1 If the proposed governance structures are not yet in place, please indicate when these are likely to commence.

Local Partner delivery group EWG/

4.2 What controls and assurance mechanisms will you put in place to ensure that all spend incurred in delivering Connect to Work is accurate, valid, and reasonable?

Compliance and quality manager

4.3 What controls and assurance mechanisms will you put in place to ensure that the quality of delivery of Connect to Work, is of the required standard and how frequently will this be reviewed?

4.4 How you will demonstrate continuous improvement to the quality of your services, safeguard high standards of care and create an environment in which excellence will flourish?

Lessons learnt, sharing best practice,

Section 5 – Performance and Management Information (MI) reporting requirements

The agreed set of MI will be essential to the effective running of Connect to Work. This will include shared MI which will be used to monitor and manage the Grant, including the agreed performance measures.

MI/data gathered will also be used to provide a source of evidence for the monitoring and evaluation of the programme, and additionally to enable wider evaluation activities such as sampling for research and impact analysis.

Please note that in this section we are referring to the collection of data/Management Information and ensuring quality across your Delivery Area.

5.0 How will you manage performance within the Accountable Body, to achieve the levels set out in your Delivery Plan, including the agreed performance measures?

5.1 How will you manage the accurate and timely collection of Management Information, including the timelines agreed in the Grant Guidance (and the Technical Note: General).

Section 6 - Developing an integrated support offer with strategic fit to local priorities

As set out in the Grant Guidance, a key element of the Supported Employment models is that services are well embedded with other local support for the target groups and local labour market systems. The funding will be the first contribution to enabling you to stand up (over time) a wider offer to tackle inactivity, by connecting broader work, health and skills support and, in turn, supporting the Government's Get Britain Working strategy, bringing fundamental reform and transforming our relationship with local areas. Please set out your intended approach to building partnerships and integration across all appropriate local services and stakeholders

6.0 Please set out details of your current understanding of how integration with local services, including health services, is being delivered to ensure holistic support for individuals. What do you plan to do in the future, including steps to drive greater local join up between employment, health, and wider community place-based services for the target groups and in turn how do you anticipate this will improve the effectiveness of your supported employment delivery.

6.1 Please provide details of your current relationships with key partners and how you will build and develop relationships with these partners during the delivery of Supported Employment funded by this Grant, with consideration of partners for future integrated support offers. This may include health partners, the JCP, voluntary sector, and other relevant local services.

6.2 Please provide details of how you will maintain relationships with key partners, across both the geography and full spectrum of services, to ensure regular and frequent contact throughout delivery of the programme.

6.3 Please provide details of how this Supported Employment provision will fit strategically within your local priorities and overall plans to tackle inactivity – building towards your work, health and skills planning. Please provide information about how the Supported Employment funded by this Grant will join up with and provide additionality to local provision in your area, including pre-existing Supported

Employment or other support funded from UKSPF, WorkWell, and the Adult Education Budget.

6.4 Tell us about any challenges you may face in developing partnerships and an integrated approach to mobilising this Supported Employment and your approach to managing those challenges. Describe what, if any, support you may require from DWP in this process.

Section 7 - Protecting Participant data

It is important for personal data to be collected, stored, and always used appropriately and securely in line with legal and statutory requirements. The Accountable Body and their Delivery Partners are required to meet established standards for data security, including UK General Data Protection Regulation (UK GDPR) and other applicable data protection legislation.

7.0 Briefly describe how you are embedding data protection by design into the design and delivery of Connect to Work.

7.1 Explain the data sharing and data governance mechanisms within your Delivery Area, to support the delivery and evaluation of Connect to Work. This work can be ongoing, but please elaborate as far as you are currently able on work undertaken so far.

7.2 As the Accountable Body for your Delivery Area, it will be your role to ensure that the required Data Sharing Agreements (Agreements) are in place with (and where necessary, between) Delivery Partners, so that data can be shared for delivery and evaluation purposes, including sharing data with DWP. Please advise where Agreements are already in place or, where these are not yet agreed, outline what plans are in motion to put these in place.

7.3 Provide details of the procedures and systems that you plan to deploy, to ensure that Participant information is being stored securely at all times.

Section 8 – Subsidy control

The following questions relate to subsidy control. Connect to Work is not intended to be a subsidy (as defined in the Subsidy Control Act 2022) and therefore DWP needs assurances from the Accountable Body and its Additional Delivery Area Members that the Grant will not constitute “financial assistance that confers an economic advantage on one or more enterprises”.

Please detail and provide DWP with responses to the questions set out below together with sufficient evidence (if appropriate) to substantiate the responses given, to provide assurance to DWP that either a) no or only minimal economic activities are undertaken by the Accountable Body and each Additional Delivery Area Member); or b) any funds that may be granted under Connect to Work will be adequately ringfenced from any economic activities the Accountable Body and each Additional Delivery Area Member carries out.

An “economic activity” for these purposes means the offering of goods or services on a market.

Further detail on subsidy control, economic activities and ringfencing can be found here:

https://assets.publishing.service.gov.uk/media/658025b295bf65000d719140/uk_subsidy_control_regime_statutory_guidance.pdf

Please provide responses in respect of the Accountable Body, and each Additional Delivery Area Member.

DWP reserves the right to raise further questions if needed to establish whether or not any funding may constitute a subsidy, and ultimately decide not to award the Accountable Body the Connect to Work Grant.

8.0	Is the Accountable Body or any Additional Delivery Area Member involved in any economic activities? NB. for the avoidance of doubt we do not consider 'in-house' delivery (i.e. for themselves and not commercial in purpose) by Accountable Bodies or Additional Delivery Area Members to be 'economic activities' as these services are not being offered on a market (as per the definition above) and they are not acting for a commercial purpose.	Yes/No
8.1	If the Accountable Body or any Additional Delivery Area Member is involved in any economic activity, what proportion of the Accountable Body's or Additional Delivery Area Member's capacity do the economic activities constitute? <i>[Insert response here]</i>	
8.2	Please provide a description of the Accountable Body's or the Additional Delivery Area Member's economic activities and how they relate to activities proposed to be funded under the Connect to Work Grant (including any areas of overlap). <i>[Insert response here]</i>	
8.3	What measures, if any, will the Accountable Body's or the Additional Delivery Area Member implement in order to ring-fence the Connect to Work Grant funding from the Accountable Body's or the Additional Delivery Area Member's economic activities? <i>[Insert response here]</i>	

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Section 9 – Accountable Body declaration

By submitting this Delivery Plan signed by an authorised representative, the Accountable Body confirms that:

- The information set out in the Delivery Plan is accurate and true.
- The Accountable Body is the lead local authority applying for the Connect to Work Grant on behalf of the Delivery Area. As such, the Accountable Body confirms that it is appropriately empowered by legally authorised Additional Delivery Area Members to deliver the Connect to Work service proposed in the Delivery Plan. This includes due consideration of the mechanisms available to them to deliver the Connect to Work service.
- It will put in place its own arrangements across the Delivery Area.
- It is committed to completing and collecting MI as part of delivering a Connect to Work service (see section 'Management Information (MI) and Reporting Requirements' of the Grant Guidance for further details).
- It is committed to participating in a regional/national network to share good practice between other Accountable Bodies' delivering Connect to Work.
- It is committed to delivering Connect to Work in accordance with the final Grant Funding Agreement between the DWP and the Accountable Body.

Signature:

Name and
position of
authorised
representative:

Date:

For and on behalf of the Accountable Body

Economic Inactivity Jan to Dec 24
Annual targets established by DWP

	Total Pool 2024	Target Jan 26-Mar	Target 26-27	Peak Target 27-28	Target 28-29
Anglesey	8,700.00	35	95	100	75
Gross Budget		129,500.00	351,500.00	370,000.00	277,500.00
Net Budget		106,015	287,755.00	302,900.00	227,175.00

Target 29-30	Total to achieve 2026-2030 C2W
8	313
29,600.00	1,158,100.00
24,232.00	948,077.00

Isle of Anglesey County Council

Report to:	The Executive
Date:	November 2025
Subject:	Acceptance of Grant Funding Offer from Ambition North Wales
Portfolio holder(s):	Councillor Gary Pritchard Leader and Portfolio Holder for Economic Development
Head of service / director:	Christian Branch – Head of Service Regulation & Economic Development Service
Report author:	Tudur H. Jones – Chief Officer Economic Development
Local members:	Relevant to all

A – Recommendation(s) and reasons

That the Executive delegates authority to the Chief Executive, in consultation with the Leader and Portfolio Holder for Economic Development, the Directors of Council Business/ Monitoring Officer and Resources/Section 151 to accept the grant offer of £10.474m from Ambition North Wales.

The Grant Offer from Ambition North Wales (ANW)

This grant funding offer will be in respect of:

1. Constructing x10 new business units in Amlwch
2. Redeveloping the Marine Terminal Building in Amlwch
3. Constructing a new access route from Tregarnedd to the former Peboc site
4. Constructing x1 new business unit on Tregarnedd, Llangefni

1. Construction of new business units at Amlwch

Involves the construction of x10 (ten) new business units on scrubland in Amlwch at a cost of £4.96m. These units will provide new business floorspace of 1,894 sq ft (1,291m²) and be able to accommodate circa 35 jobs.

2. Redevelop the Marine Terminal Building in Amlwch

Involves the full redevelopment of the Marine Terminal building in Porth Amlwch at a cost of £4.86m. This scheme will bring back useable business floorspace of 10,665 sq ft (990m²) and be able to accommodate circa 25 jobs.

3. Construct new Peboc (Llangefni) access route

To be able to access the former Peboc site a new route from the Tregarnedd business park is required measuring some 40m in length. This route is the preferred option following consultation with Officers from Highways as it can be constructed to specification and accommodate the necessary range of vehicles.

4. Construct new business unit on Tregarnedd estate (Llangefni)

Involves the construction of x1 (one) new business unit on the Tregarnedd business park at a cost of £3.48m. This unit will provide new business floorspace of 9,420sq ft (875m²) and be able to accommodate circa 24 jobs.

Background/ Context

In June 2025, the Regulation & Economic Development Service (R&Eds), following a successful EOI process, were included on the Reserve Project List and invited by the ANW to formally submit funding applications. A significant volume of work was undertaken to develop detailed Business Justification Cases (and all supporting appendices) for North Anglesey Sites & Premises Programme and the Peboc Gateway with the final version of these documents formally submitted to ANW on September 5th 2025.

On the 3rd of October 2025, the Council was formally notified by ANW that its bid had been successful for the full amount of £10.474m.

Considering the challenging timescales, the volume and detail of information required by ANW, and that this was an extremely competitive process, securing this funding (and all necessary match funding) is an excellent outcome for the Council.

Meeting our Strategic Challenges in the Council Plan

These investments demonstrates the Council's ongoing commitment to addressing the socio-economic challenges in North Anglesey as outlined within the Council Plan 2023-2028 and the North Anglesey Economic Regeneration Plan. Whilst it will not fully address and overcome the challenges, it will nonetheless provide a catalyst for jobs, opportunities and further investment.

The funding will also enable the Council to finally address the issues and risks – in particular health and safety concerns – posed by the former Peboc site in Llangefni. This key, strategic brownfield site is a blight on the business park and could accommodate 139 number of jobs, critical against the backdrop of the recent closure of 2-Sisters and the loss of 730 jobs. The site also benefits from being recognised as a Freeport tax-site and can therefore provide attractive benefits for any potential future inward investors.

Governance Structures

This is a substantial grant offer from ANW and the R&EDs is cognisant that as with all capital schemes of this nature there is the element of risk that needs careful consideration, mitigation and programme management.

Established programme and project management structures and principles will be adopted to implement and deliver these schemes should the Executive approve. Experienced Project Managers will be appointed to lead who will in turn report directly to an established Programme Board– which consists of the appropriate Senior Officer representation – that replicates existing governance structures from other programmes such as Levelling Up Funding; Shared Prosperity Fund and Porthladd Rhydd Ynys Môn. This approach will ensure there are clear reporting structures, is accountable and transparent and has been implemented previously on the Sites & Premises Programme of 2013-2024.

A risk assessment related to the outlined schemes above has been undertaken, in compliance with the Council's best practice and a full risk register has been submitted as part of the funding application. Risk will be managed according to the council's risk management processes and procedures and will form a critical part of our ongoing support from the design team, architects, construction company (when appointed) and from consultants.

B – What other options did you consider and why did you reject them and/ or opt for this opinion?

Option 1: Do nothing – By doing nothing and not accepting the offer of grant funding, the Council would either have to fund the works itself; source alternative grant funds or not press ahead with the scheme. Declining the grant offer of £10.474m has also been rejected as an option.

Option 2: Do something different – No other funding routes are available to help progress these works, especially of this significant value.

C – Why is this a decision for the Executive?

Given the scale and that the grant is of significant value, it is a decision for the Executive to accept the grant offer.

Ch – Is this decision consistent with policy approved by the full Council?

Yes

D – Is this decision within budget approved by the Council?

Dd – Assessment of potential impacts (if relevant)

1. How does this decision affect our long-term needs as an island?

The successful implementation of these projects will ensure transformational change in both Amlwch and Llangefni creating significant job opportunities for both communities against a back-drop of job losses.

2. Is this a decision that is anticipated to prevent future costs/ dependencies on the Council? If so, how?

These projects will be externally funded. When the projects are complete, there will be future maintenance costs associated with the buildings but provided these buildings will be occupied, the income generated will cover any running costs.

3. Have we collaborated with other organisations to come to this decision? If so, with whom?

The Council has collaborated with a number of partners and stakeholders to secure this funding. This includes the NRS (Nuclear Restoration Services); Welsh Government and also Ambition North Wales .

4. Have the citizens of Anglesey played a part in drafting this way forward, including those directly affected by the decision? Explain how.

Whilst the citizens of Anglesey have not directly played a part, they have been consulted through the statutory processes of the planning application and have been provided an opportunity to provide comments.

5. Note any potential impact this decision would have on the protected groups under the Equality Act 2010.

These investments have the potential for creating significant positive impacts on protected groups under the Equality Act as a result of generating investment opportunities and job opportunities.

6. If this is a strategic decision, note any potential impacts the decision would have on those experiencing socio-economic disadvantage.

These projects specifically aim to help those experiencing socio-economic disadvantage so any decision not to support the programme would have a negative impact.

7. Please note any potential effects that this decision would have on opportunities for people to use Welsh and not treat the language less favourably than English.

All aspects in relation to the projects will be delivered bilingually. It is also hoped that the employment opportunities generated (with associated training, development and re-skilling in businesses occupying the premises constructed), will encourage more Welsh speaking local people to remain on the Island and not have to leave to seek work.

E – Who did you consult with and what were their comments?

1. Chief Executive / Leadership Team (mandatory)	Supportive of the report with a request to include maps to make clear where the investments will take place in Amlwch and Llangefni.
2. Finance / 151 Officer	As above.
3. Legal / Monitoring Officer (mandatory)	As above.
4. HR	
5. Property	
6. IT	
7. Procurement	
8. Scrutiny	
9. Local members	

F – Appendices

Annex A – map of Amlwch
Annex B – map of Llangefni

Ff – Background papers (contact the report author for more information)

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-  Marine Terminal
-  Amlwch Business Units
-  Octel - Freeport Tax Site

-  Freeport Tax Site
-  Peboc Acquisition Boundary
-  Plot 2 - Tregarnedd Industrial Park
-  Plot 3 - Tregarnedd Industrial Park



0.05 0.1 km

Isle of Anglesey County Council	
Report to:	Executive Committee
Date:	25 th November 2025
Subject:	Public Consultation on the proposed Visitor Levy
Portfolio Holder(s):	Cllr. Alun Roberts (Leisure, Tourism, Maritime and Property)
Head of Service / Director:	Christian Branch Head of Regulation & Economic Development
Report Author: Tel: E-mail:	Andy Godber Visitor Economy and Coastal Areas Manager andygodber@ynysmon.llyw.cymru
Local Members:	Applicable to all Elected Members

A –Recommendation/s and reason/s
The Executive Committee is asked to support: 1. The undertaking of a public consultation process regarding the potential introduction of a visitor levy on Anglesey (in line with Council and Welsh Government guidelines). 2. That the consultation process be planned in conjunction with Gwynedd and Conwy Councils but conduct the process independently. The visitor levy is a small additional charge to be paid when staying in visitor accommodation in Wales. The money raised from the levy will be used to improve local tourism. This visitor levy will help to: • maintain local facilities and infrastructure • protect Wales's stunning landscapes • ensure communities can continue welcoming visitors whilst preserving what makes each area special Local councils can choose if they want to introduce the visitor levy in their area. They will make the decision after consulting with residents and businesses. This means the levy will only be charged in areas where communities have decided it is right for them. The earliest a council could bring in a visitor levy is April 2027.

A –Recommendation/s and reason/s

The Welsh Government advocate the use of the Gunning Principles for consultation – these are:

- Consultation must be at a formative stage – it is suggested that subject to approval consultation should commence in January 2026.
- Sufficient information must be provided to allow intelligent consideration of response and may include an economic impact assessment. Other considerations are to include information on the improvements to destination management which would result from the additional funding derived from the Levy.
- Adequate time must be given for consideration and response – There is no defined period of consultation but it is recommended that a 12 week consultation be adopted following the Gunning Principle.
- Feedback from the consultation must be considered by decision makers.

Further details and the approach to consultation can be read in Annex A

B – What other options did you consider and why did you reject them and/or opt for this option?

The other option would be to reject the introduction of the Visitor Levy for Anglesey without consulting the sector and wider public.

C – Why is this a decision for the Executive?

The executive is asked to support the recommendation to consult on the potential introduction of the Levy

Ch – Is this decision consistent with policy approved by the full Council?

Although not specifically referenced in the Destination Management Plan nor Council Plan, the rationale of the Levy to deliver sustainable destination management is consistent with both policies.

D – Is this decision within the budget approved by the Council?

The consultation and accompanying economic and equality impact assessments will cost in the region of £15,000. Regulation and Economic Development Service funding will be utilised to deliver this.

Dd – Assessing the potential impact (if relevant):

1	How does this decision impact on our long term needs as an Island?	The recommendation is to support the delivery of a full consultation process These will form the basis for a decision on the adoption of the Visitor Levy.
2	Is this a decision which it is envisaged will prevent future costs / dependencies on the Authority? If so, how?	Not applicable – currently support required for consultation phase only
3	Have we been working collaboratively with other organisations to come to this decision? If so, please advise whom.	The intention is to work collaboratively with the neighbouring Councils of Gwynedd and Conwy to follow a set timescale and process for consultation and assessments. However, the consultation itself will be independently conducted.
4	Have Anglesey citizens played a part in drafting this way forward, including those directly affected by the decision? Please explain how.	The public will have an opportunity to provide feedback through the consultation process
5	Note any potential impact that this decision would have on the groups protected under the Equality Act 2010.	A full equality impact assessment will be carried out. Welsh Government have undertaken a National Equality Impact Assessment. Revised analysis of the potential economic and greenhouse gas impacts of a visitor levy
6	If this is a strategic decision, note any potential impact that the decision would have on those experiencing socio-economic disadvantage.	A full economic impact assessment will be carried out. Welsh Government have undertaken a National Economic Impact Assessment Visitor Accommodation (Register and Levy) Etc. (Wales) ACT 2025: Equality Impact Assessment
7	Note any potential impact that this decision would have on opportunities for people to use the Welsh language	The consultation process will be fully bilingual

Dd – Assessing the potential impact (if relevant):		
	and on treating the Welsh language no less favourably than the English language.	

E – Who did you consult?		What did they say?
1	Chief Executive / Senior Leadership Team (SLT) (mandatory)	Recommended that consultation should be conducted. Recommended that collaboration on the consultation approach should be done with Gwynedd and Conwy Councils but that the consultation itself should be independent.
2	Finance / Section 151 (mandatory)	
3	Legal / Monitoring Officer (mandatory)	
4	Human Resources (HR)	NA
5	Property	NA
6	Information Communication Technology (ICT)	Preparing the digital consultation materials
7	Procurement	NA
8	Scrutiny	NA
9	Local Members	NA

F - Appendices:
Annex A: Consultation Requirements
Visitor Levy - Consultation Requirements Nov25 (003)

Ff - Background papers (please contact the author of the Report for any further information):

Welsh Government Visitor Levy

Consultation expectations and requirements for Local Authorities, September 2025

1. Introduction

The Visitor Accommodation (Register and Levy) Etc. (Wales) Act 2025 received Royal Assent on 18th October. The Act gives local authorities the power to introduce a visitor levy (the levy) charged on overnight stays in visitor accommodation in their area. The levy is discretionary in nature; it will be for local authorities to decide whether to introduce it following consultation with their communities and local businesses.

Implementation of the levy itself is discretionary for each local authority and cannot occur before 2027 as it must be preceded by a consultation with mandatory consultees.

More information on the levy can be found here;

[Visitor Levy and Register of Visitor Accommodation Providers](#)

2. Welsh Government Draft Consultation Guidance

The route map for the decision-making process by the local authority has been published in draft form by Welsh Government and forms the basis of this update on next steps.

Neighbouring authorities of Gwynedd and Conwy have illustrated an intention to undertake a consultation process on the potential introduction of the Levy in January 2026, and it is considered prudent by officers to follow a similar timeline.

This consultation process will inform the decision making of the council.

Each local authority has discretion on whether to adopt and implement the visitor levy. If an authority wishes to implement a levy there is a mandatory consultation with residents, businesses and other local organisations prior to implementation.

3. Consultation requirements

- Consultation must be at a formative stage
- Sufficient information must be provided to allow intelligent consideration of response and may include an economic impact assessment. Other considerations are to include information on the improvements to destination management which would result from the additional funding derived from the Levy.
- Adequate time must be given for consideration and response – we would follow best practice with a minimum of **6 weeks**.
- Feedback from the consultation must be considered by decision makers.

3.1 Local authorities must consult with the following groups:

- Local residents, workers, and students.
- Community councils within the principal council's area.
- Public Services Boards.

- Neighbouring principal councils.
- A corporate joint committee that includes at least senior executive member of the council.
- Organisations that represent businesses that work in tourism

3.2 The consultation should include:

- A published proposal outlining the case for the levy.
- Potential benefits and suggestions for how the levy might be invested.
- A local impact assessment (social, economic, environmental effects).
- Clear, accessible materials and realistic timelines.
- Collaboration with the Welsh Revenue Authority (WRA) for operational advice and support.

3.3 Local authorities must also:

- Conduct Equality Impact Assessments under the Equality Act 2010.
- Align with the Well-being of Future Generations (Wales) Act 2015.
- Follow the Code of Recommended Practice for consultation and engagement.

3.4 Engagement Methods

The consultation costs are to be covered by the local authority and as such the suggestion is to make use of most cost-effective means of engagement.

These would be -

- Digital and social media.
- Local radio, print media.

Additional more costly methods of engagement could be considered -

- Public meetings, workshops, pop-ups.

4. After consultation:

- Officers may recommend introducing the levy.
- The full council must vote on the decision.
- If approved, a formal notice must be published including -
 - ◇ Results of the decision making process
 - ◇ Rates of the Levy to be introduced
 - ◇ Effective date for introduction
 - ◇ Other information the authority considers appropriate

5. Local authority options and obligations

Local authorities can decide how to use any revenues raised from the visitor levy to support tourism. They must set out their proposed use of the levy in a report to be published before any consultation takes place and they will be required to provide an annual report on how the revenues raised have benefited their area.

The intention is that this new money will cover the existing costs associated with hosting visitors, such as street cleaning, waste collection, preserving natural and cultural attractions as well as being used to support and improve tourism infrastructure, such as toilets, footpaths and visitor centres.

The establishment of a visitor Levy Partnership Forum which is a requirement on all adopting councils will support this determination of spend allocation. It is suggested that the Destination Management Partnership form the basis of this Forum if the authority decides to introduce the Levy after consultation.

It should also be noted that the levy cannot be amended or abandoned until it has been in place for at least 12 months and any amendments would require a further consultation process.

6. Other information

All visitor accommodation providers in Wales will be required to sign up to the national register.

Collection of the levy will be managed by the Welsh Revenue Authority (WRA) on behalf of any local authority that chooses to implement a visitor levy.

Implementing the visitor levy could generate in excess of £1m per annum for the Isle of Anglesey

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