



To: the Leader and Members of the Cabinet

Agenda

Dear Cabinet Member

CABINET

A meeting of the Cabinet will be held as follows:

Date: Tuesday, 23 January 2024
Time: 10.00 am
Venue: Barrow Town Hall, Duke Street, Barrow in Furnes,

A handwritten signature in black ink, appearing to read 'Linda Jones'.

Linda Jones
Chief Legal and Monitoring Officer
Westmorland and Furness Council

Enquiries and requests for supporting papers to: Jackie Currie
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MEMBERSHIP

Cllr G Archibald
Cllr P Bell
Cllr J Brook (Chair)
Cllr J Derbyshire
Cllr N Hughes

Cllr A Jarvis
Cllr D Jones
Cllr S Sanderson
Cllr V Taylor
Cllr P Thornton

ACCESS TO INFORMATION

Agenda and Reports

Copies of the agenda and Part I reports are available for members of the public to inspect prior to the meeting. Copies will also be available at the meeting.

The agenda and Part I reports are also available on the Westmorland and Furness website

<https://westmorlandandfurness.moderngov.co.uk/ieListMeetings.aspx?Committeeld=223>

A G E N D A

1. Apologies for Absence

To receive any apologies for absence.

2. Declarations of Interest/Dispensations

To receive declarations of interest by Members of interests in respect of items on this Agenda, and to consider any dispensations.

Members may however, also decide, in the interests of clarity and transparency, to declare at this point in the meeting, any such disclosable pecuniary interests which they have already declared in the Register, as well as any other registrable or other interests.

3. Exclusion of Press and Public

To consider whether the press and public should be excluded from the meeting during consideration of any items of business on the agenda.

4. Minutes of the Previous Meeting

To receive the minutes of the previous meeting held on 12 December 2023 (copy enclosed)

(Pages 7 - 26)

5. Statements from the Leader and Cabinet Members

To receive statements by the Leader of the Council and Cabinet Members.

6. Public Participation

To receive any questions or statement which have been received from members of the public and to receive any petitions.

(note questions or statement must be received in writing (including email) by the Council at least 3 clear working days before the day of the meeting (not including the day of the meeting). So, for example, if the meeting is on Tuesday requests must be received by 11.59 pm on the previous Wednesday by the person named on the front of the agenda. Petitions must have been presented to the Monitoring Officer 9 working days before the date of this meeting to be valid).

7. Questions to Cabinet Members

This item gives Councillors an opportunity to put questions to Cabinet Members.

Questions must relate to the powers, duties or responsibilities of the Cabinet and must relate to their portfolio responsibilities. Questions should be brief, clear and focussed.

This item will last for a maximum of 20 minutes.

8. Referrals from Council or Overview and Scrutiny Committees

For Cabinet to consider any referrals from Council or any of the Overview and Scrutiny Committees.

9. Westmorland and Furness Carbon Management Strategy

To consider a report from the Cabinet Member for Climate and Biodiversity (copy enclosed).

(Pages 27 - 86)

10. Climate Change Action Plan Part Two

To consider a report from the Cabinet Member for Climate and Biodiversity (copy enclosed)

(Pages 87 - 148)

11. Consultation on the potential expansion of school places at Beaconside CE Primary School including additional resource provision

To consider a report from the Cabinet Member for Children's Services, Education and Skills (copy enclosed)

(Pages 149 - 186)

12. North Walney Primary School - Decision to Publish Statutory Notice

To consider a report from the Cabinet Member for Children's Services, Education and Skills (copy enclosed)

(Pages 187 - 236)

13. Determination of 2025/26 Admissions Arrangements for Community and Voluntary Controlled Schools and 2025/26 Co-ordinated Admissions Scheme

To consider a report from the Cabinet Member for Children's Services, Education and Skills (copy enclosed)

(Pages 237 - 278)

14. Approval to Award onto a framework for the provision of homecare and domiciliary care services

To consider a report from the Deputy Leader and Cabinet Member for Adult Social Care (copy enclosed)

(Pages 279 - 294)

15. Marina Village - Barrow in Furness

To consider a joint report from the Leader of the Council and Cabinet Members for Finance; Housing and Homelessness and Sustainable Communities and Localities (copy enclosed)

Appendix 3 and 4 of this report is not for publication by virtue of Section 100B (2) of the Local Government Act 1972, Schedule 12 Paragraph 5 - information in respect of which a claim to legal professional privilege could be maintained in legal proceedings.

(Pages 295 - 342)

16. Urgent Items

To consider any urgent items of business.

PART II - ITEMS CONSIDERED NOT IN THE PRESENCE OF THE PRESS AND PUBLIC

Agenda Item No 15 – Marina Village Barrow in Furness

Appendix 3 and 4 of this report is not for publication by virtue of Section 100B (2) of the Local Government Act 1972, Schedule 12 Paragraph 5 - information in respect of which a claim to legal professional privilege could be maintained in legal proceedings.

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WESTMORLAND AND FURNESS COUNCIL CABINET

Minutes of a Meeting of the **Cabinet** held on Tuesday, 12 December 2023 at 10.00 am at South Lakeland House, Kendal

PRESENT:

Cllr G Archibald
Cllr J Brook (Chair)
Cllr J Derbyshire
Cllr N Hughes
Cllr A Jarvis
Cllr D Jones
Cllr S Sanderson
Cllr V Taylor
Cllr P Thornton

Also in attendance: Cllr J Battye

Officers in attendance:

Ms S Cordon	Director of Thriving Communities
Ms P Duke	Director of Resources (Section 151 Officer)
Ms C Gould	Assistant Director - Climate and Natural Environment
Ms A Hatcher	Assistant Chief Executive
Ms A Jones	Director of Thriving Places
Ms L Jones	Chief Legal Officer (Monitoring Officer)
Mr A Moffatt	Democratic Services
Ms S Plum	Chief Executive, Westmorland & Furness Council
Mr P Robinson	Director of Enabler Services
Ms S Turnbull	Senior Manager - Communications
MS C Wagstaff	Assitant Director of Housing
Ms C Whalley	Director of Adult Social Care

PART I ITEMS CONSIDERED IN THE PRESENCE OF THE PUBLIC AND PRESS

87. APOLOGIES FOR ABSENCE

An apology for absence was received from Cllr Bell.

88. DECLARATIONS OF INTEREST/DISPENSATIONS

There were no declarations of interest made on this occasion.

89. EXCLUSION OF PRESS AND PUBLIC

RESOLVED, that the press and public be not excluded during consideration of any items of business on the agenda today.

90. MINUTES OF THE PREVIOUS MEETING

RESOLVED, that the minutes of the previous meeting held on 14 November 2023 be agreed as a true and accurate record.

91. PUBLIC PARTICIPATION

Mr Jonathan Davies attended to ask the Leader of the Council the following question:-

“At the September full council meeting I questioned the council on its failure under the local government transparency code to publish its monthly spending reports.

The monthly reports are now thankfully appearing on the council’s website with a few months delay.

However, as part of the financial transparency, Westmorland and Furness Council has a duty under the local government transparency code to publish its expenditure and spending on procurement cards.

Westmorland and Furness Council currently have 251 active procure cards. 86 corporate credit cards along with Westmorland & Furness schools holding a further 165 cards, for a total of 251.

251 individuals are authorised to make transactions with the corporate credit cards.

Yet since the 1 of April Westmorland and Furness Council has failed to publish as is required any details of the spending on any of the 251 corporate credit cards.

The Local Government Transparency Code 2015 requires local authorities in England to publish information related to procurement card transactions.

Given that in the final Month of Eden District Council who held just one corporate credit card that council spent over sixteen thousand pounds in March 2023 giving the potential across 251 council credit cards for concerning levels of unreported spending.

Could the leader please explain why Westmorland and Furness Council has failed to disclose the expenditure to date on any of the 251 corporate credit cards held by the council for public scrutiny and given that the council has told departments of the council it’s not interested in anything under 15k overspend this year. Does the council know the amounts spent on its 251 credit cards since the 1 of April 2023?”

The Leader of the Council responded to say:

‘Thank you for attending today to ask your question.

Westmorland and Furness Council do have 86 corporate credit cards allocated to individuals within the organisation for use for critical/ emergency expenditure items. We also have a 165 cards issued to schools in the Westmorland and Furness.

All expenditure via corporate credit cards need to comply with the council expenditure rules, be within agreed budgets and is subject to monitoring and audit. It is individually identified and authorised.

This information should be published as part of the transparency information on the Council website but to date hasn't yet been included. The Council is working on producing the information into a format for publishing as soon as possible.

Mr Davies asked a supplementary question regarding the publication of decisions taken by officers. The Chief Legal and Monitoring Officer explained that all Officer Decision Records were published on the Council's website and that she would be happy to provide a link to the website.

92. STATEMENTS FROM THE LEADER AND CABINET MEMBERS

The Leader thanked the staff in the Highways Team for their response to the recent heavy snow fall and paid testament to the hard work and dedication of the staff to keep the highways open, where possible.

The Cabinet Member for Highways and Assets also paid tribute to the Highways staff and commented on the exceptional snow fall seen across the Westmorland and Furness area. He noted that the Highways Team had done a brilliant job and that a review of the response would be undertaken to improve the Council's response for future events. It was noted that other teams within the Council had co-ordinated the opening of various village halls across the affected areas to ensure that those stuck in the snow where able to rest.

The Cabinet Member for Climate and Biodiversity echoed the comments made regarding the Council's response to heavy snowfall across the area. He informed Members of a report due to be published by the Environment Agency, which would include data on the level and sources of pollution. It was noted that the publication of this report would allow the Council to hold constructive conversations with stakeholders to reach consensus on how reach a solution future actions regarding the level of water pollution in Windermere.

93. QUESTIONS TO CABINET MEMBERS

None for this meeting.

94. REFERRALS FROM COUNCIL OR OVERVIEW AND SCRUTINY COMMITTEES

Councillor J Battye, Chair of the Health and Adult Overview and Scrutiny Committee addressed Cabinet Members following a report from Lancashire and South Cumbria Integrated Care Board, regarding the Dental Access and Oral Health Improvement Programme.

The presentation identified five key factors which were challenging NHS dental services nationally, which were:-

- Reduced care during the pandemic;
- Worsening oral health of the population;
- Funding;
- Dissatisfaction with the national contract; and
- Workforce challenges.

Cabinet Members were informed of actions being taken locally to improve the service and the underlying issue of funding which was causing Dentists to withdraw from providing NHS Services, resulting in some areas having limited or no availability.

The Health and Adults Scrutiny Committee agreed to draw this matter to the attention of Cabinet and ask for support to raise the issue nationally alongside other Councils through the Local Government Association and any other appropriate routes.

The Leader thanked Councillor Battye for bringing the matter to the attention of Cabinet and noted that Cabinet supported this approach and would follow up with a response to the Health and Adults Scrutiny Committee and provide updates on progress.

95. 2024/25 BUDGET CONSULTATION AND MEDIUM TERM FINANCIAL PLAN (MTFP) 2024 - 2029 UPDATE

The Cabinet Member for Finance presented a report which updated members on the development of the 2024/25 revenue budget and 2024-2029 Capital programme and Medium Term Financial Plan for Westmorland and Furness Council.

This would be the first full budget setting process that Westmorland and Furness Cabinet and Council would deliver as the 2023/24 Revenue Budget and Capital Programme 2023-2028 was set by the Westmorland and Furness Shadow Authority Council in March 2023.

The report updated on the approach being taken to deliver a balanced budget for the 2024/25 financial year and set out financial planning assumptions for 2025/26-2028/29. The importance of a five-year financial planning period was to demonstrate ongoing commitments to deliver change and transformation programmes which would be essential for the long-term financial sustainability of the Council.

In September 2023 the Council published its first Council Plan Delivery Framework. The Delivery Framework built on the Council Plan and explained the approach for delivery; and also established ten intentionally bold mission statements that when delivered, in collaboration with our partners and communities, will enable delivery of our vision.

This required the Council to change and transform not just what we do but how we do it. This meant that the Medium Term Financial Plan needed to enable and support those changes and provide an ability to 'pivot' the existing budgets into areas of investment whilst also ensuring that capacity and the legacy impacts of Local Government Reorganisation (LGR) were sufficiently resourced and the benefits of becoming a unitary council are realised.

The report set out the parameters of the Councils consultation with stakeholders on the potential increases in the level of Council Tax and Adult Social Care precept for 2024/25. The Council was also consulting on other proposed changes to Council Tax charges as part of the approach to delivering a balanced budget in 2024/25. This was in readiness for Cabinet to recommend the Budget Proposal 2024/25 and Medium Term Financial Plan (2024-2029) to Council at its meeting on 13 February 2024.

The budget consultation document would seek views on the Council's general increase to Council Tax for 2024/25. The proposed Council Tax increase for 2024/25 was 2.99% and was consistent with the existing MTFP and the proposed Council Tax Referendum threshold as stated by Government in the two year financial settlement last year. In addition, the Council proposed to increase the Adult Social Care Precept by 2% to support Adult Social Care Services and this was in line with the MTFP assumptions.

Since 1 April 2023, a significant amount of work had been undertaken to review the detail within the combined legacy budgets to ensure the Westmorland and Furness directorate budgets aligned with their service responsibilities. This had been a significant task and had resulted in some changes being made to the original allocation of budgets between directorates. A restated directorate budget position will be provided within the MTFP 2024-2029.

The Cabinet Member informed members that inflation was expected to be more persistent and domestically fuelled than previously thought with the expectation that it would be below 5% by the end of this year but not returning to its 2% target until the first half of 2025.

Budget pressures

A review of potential recurring and one-off pressures has been undertaken as part of the quarterly budget monitoring in 2023/24 (Q1 and Q2).

One of the budget pressures being faced by the Council was the same as the national pressures in children services ranging from children's social care, SEND, to home to school transport. Cabinet recognised that further work was required before Cabinet could propose a balanced budget to Council in February 2024. Given the uncertainty of potential additional funding for local government and the need for further analysis and understanding of the Council's new budget, further work was ongoing and final proposals to deliver a balanced budget would be presented in February 2024.

The estimated pressure in homecare costs and the increased cost for those being supported through a supported living service had increased. Through the pandemic individuals were supported at home rather than attending day service provision and this had continued as the preference and independent living choice for many.

The estimated pressure for supported accommodation was due to an increase in enhanced housing benefit that the Council was unable to reclaim from the Department for Works and Pensions (DWP).

Another budget pressure was around the increase in Ash Dieback affecting trees and there was a risk that an increasing number of trees each year would require to be felled because of the disease and additional inspection would be required.

The final proposed pressure was as a result of the Coronation Hall in Ulverston being returned to the Council from 1 January 2024, which would enable it to be a vital cultural and arts venue and an accessible community centred building. Officers were preparing a detailed operational model and business case for the operation of Coronation Hall and the business case would consider the required capital investment in the facility in order to enhance the user experience and improve the long-term sustainability and viability of the venue.

Fees and Charges

Income from fees and charges represented an important source of funds to the Council and enabled a range of services to be provided within the area and beyond.

Discretionary fees and charges were proposed to increase by 7% to reflect inflationary cost pressures, which was in accordance with the current policy, apart from some specific exceptions that would increase at a higher rate.

There were also some fees and charges that were changing for other reasons, such as the statutory increase on planning fees, or reflecting income recovered from other organisations.

Capital Programme

Through Q2 monitoring the Capital Programme for 2023-2028 was updated and following quality assurance work, the programme had been reprofiled to reflect expected delivery timescales and the programme was fully funded.

Work was ongoing to progress the pending capital schemes identified in the 2023-2028 MTFP. The solar farm and the affordable housing investment fund had been already included in the Capital Programme whilst others were nearing completion of robust business cases in order that the scheme can progress.

The Cabinet Member moved the recommendations, which were seconded by the Leader of the Council.

In seconding the recommendations, the Leader thanked officers for their hard work in drafting the report and appendices. He expressed his support for the proposals and looked forward to the results of the consultation.

The Cabinet Member for Climate and Biodiversity echoed the Leader's thanks to officers and emphasised the importance of delivering and implementing the Council's priorities.

The Cabinet Member for Transport and Environmental Services thanked officers for their hard work in producing the report and noted the difficult economic environment. He emphasised previous comments regarding delivering on improvements, particularly regarding sustainable travel throughout the Westmorland and Furness area.

The Cabinet Members for Highways and Assets expressed his support for the investment into public rights of way and commented on the role of the Council in setting Council Tax for the coming year.

The recommendations were then put to a vote, which was unanimous. It was

RESOLVED, that Cabinet

- (1) notes the revised budget gap position of £5m for 2024/25 and support the ongoing work to continue to identify funding and saving proposals to enable a balanced budget for 2024/25 to be proposed to Council in February 2024 (Year 1 of the Medium Term Financial Plan 2024-2029);
- (2) approves consultation on the level of Council Tax for 2024/25 of a 2.99% increase in general Council Tax and a 2% increase in Adult Social Care Precept;
- (3) approves consultation on the introduction of the second homes 100% premium from the 1 April 2025;
- (4) approves consultation on the proposal to charge a 100% empty homes property premium on homes that are empty after 1 year and for homes that are empty after 10 years increase the premium to 400%;
- (5) notes the revised budget gap for planning purposes only for the period 2025/26- 2028/29; and

(6) notes that discretionary fees and charges will be uplifted in accordance with the current policy unless otherwise agreed.

96. 2023/24 REVENUE AND CAPITAL BUDGET MONITORING REPORT TO 30 SEPTEMBER 2023 - QUARTER 2

Cabinet considered a report from the Director of Resources, and presented by the Cabinet Member for Finance which set out the Council's forecast year-end financial position as at 30 September 2023, Quarter 2 (Q2); covering the 2023/24 Revenue Budget and Capital Programme 2023-2028. This is the second budget monitoring report for Westmorland and Furness Council and provides an update on the latest financial forecast for 2023/24.

Since 1 April 2023 a significant amount of work had been undertaken to review the detail within the combined legacy budgets to ensure the Westmorland and Furness directorate budgets aligned with their service responsibilities. This had been a significant task and had resulted in some changes being made to the allocation of budgets between directorates. Overall, the net budget of £268.478m has reduced to £263.478m.

The forecast outturn position as at 30 September 2023 (Q2) was a net £264.339m. Compared to the revised net budget of £263.478m this was an overspend position of £0.861m.

In preparing this report there were several known financial risks that needed to be highlighted, including:-

- Staffing allocation v establishment budget - The budgets were disaggregated by Cumbria County Council before the staff allocation exercise was undertaken, therewais a risk that the staffing allocation was greater than the staffing budget. This was currently being reviewed on a service-by-service basis.
- Inter Authority Agreement (IAA) – For the services being hosted by Cumberland Council it was assumed that at this stage, there were no pressures that the authority may need to fund under the terms of the IAA or underspends for which the authority may get a refund against the advance payments being made.
- Fees and Charges income - It was assumed at this stage that all fees and charges income would be achievable unless otherwise noted in the body of the report, such as the Windermere Ferry.
- Pay award 2023/24 - The Local Government Green Book pay award for 2023/24 had been agreed and finalised. The impact of this was still being worked through but at this stage it was assumed that overall this will be within budgeted levels i.e., 5%.

- Budgeted Inflation v contract inflation - Several contracts had annual inflationary uplifts applied to them, at the time of budget setting where the uplift was not based on September CPI an estimate was made for the % that was likely to be applied. There was a risk that the actual inflationary uplift would be greater than that budgeted.

The overall forecast outturn position for school transport at Q1 was a £2.870m overspend, the Q2 forecast of £2.100m represented an improvement in the position of (£0.770m). A programme of work had been established by the service with the intention of reviewing the systems, processes and controls being used in the procurement, recording, and monitoring of transport routes. Work had progressed on understanding the root cause of the financial pressures and to identify solutions to reduce the overspend.

The school transport overspend was caused by overspends in the Special Educational Needs and Disabilities (SEND) Transport - £1.511m overspend which was after the increase in the SEND transport budget of £1.372m approved within the 2023/24 MTFP.

Home to School Transport - £0.589m overspend which continued the trend experienced during 2022/23.

The Westmorland and Furness Shadow Authority Council set the 2023/24 Capital Programme 2023-2028 in March 2023. It brought together the Capital Programmes of the sovereign District and Borough Councils (Eden, South Lakeland, and Barrow) and the disaggregated Cumbria County Council Capital Programme and presented them as the first Westmorland and Furness Capital Programme.

The approved Capital Programme, an aggregation of the forecasted profiles from each of the legacy authorities as of Quarter 2 2022/23, was confirmed as £251.849m for schemes to be directly delivered, plus £0.936m for accountable body schemes, totalling £252.785m.

The Capital Programme 2023-2028 for schemes directly delivered begins at £251.849m. Slippage from 2022/23 (from legacy authorities) net of accelerated spend, had been identified as £31.814m.

The net changes during Q2 in grant funding and updates, increases the programme by £4.499m.

In Q2 there had been in-year virements for 2023/24 and future years which were a gross £0.792m moved from schemes/headings to others; these do not change the annual total and are and were detailed in Table 29 of the report.

In Q2 the Capital Programme Delivery Team had further reviewed the schemes, to forecast the Capital Programme that could be delivered in 2023/24 which identified £1.297m of reprofiling and accelerated spend.

The Capital Programme 2023-2028 for accountable body schemes begins at £0.936m. Slippage from 2022/23 (from legacy authorities) had been identified as £0.655m.

During Q1 £12.726m was added to the Accountable Body schemes through additional grant funding and the reclassification of the Town Deal – Learning Quarter scheme from schemes directly delivered.

There had been in-year virements for 2023/24 and future years which were a gross £1.400m moved from schemes/headings to others; these do not change the annual total and were detailed in Table 23 of the report.

Appendix 3 of the report detailed the treasury management activities during the first half of the 2023/24 financial year. It highlighted performance and activities which confirmed all Treasury Management activities undertaken during the period, including adherence to limits with the approved Prudential Indicators, were in compliance with the Annual Treasury Management Strategy Statement agreed by Members of the Shadow Authority in March 2023.

The Cabinet Member for Finance thanked officers for their hard work and dedication in producing the report.

The Cabinet Member for Climate and Biodiversity echoed the previous comments thanking officers and highlighted the importance of treasury management as well as the impressive work being done as outlined in the Capital Programme. He added that it was important for the Council to monitor the impact on the environment and any opportunities to enhance biodiversity through the Council's projects.

The Cabinet Member for Customer and Waste Services thanked the Cabinet Member for Finance for his dedication and hard work.

The Cabinet member moved the recommendations and these were seconded and put to a unanimous vote.

RESOLVED, that Cabinet

- (1) notes and recommends to Council the reduction in the Net Revenue Budget as at Q2 of £5m to £263.478m (see Paragraph 3.3 of the report);
- (2) notes that the forecast Net Revenue Budget outturn as at Q2 is a projected overspend of £0.861m; (see Table 2 of the report);
- (3) notes the use of £0.450m of the £1.1m contingency budget for 2023/24 (see Paragraph 3.9 of the report);
- (4) notes that the earmarked reserves continue to be held for the purposes established by the legacy authorities and will be reviewed as part of the 2024/25 budget setting process;
- (5) approves the creation of a £0.732m Local Government Reorganisation (LGR) Reserve funded from Westmorland and Furness' allocation following the disaggregation of the currently hosted LGR reserve, to fund disaggregation pressures in 2023/24 and future years;

- (6) approves Capital Programme grant funding changes and updates from Q2 that total £4.499m:
- £0.466m Highways & Transport – Bridges & Structures; grant funded.
 - £0.435m Non-Principal Road Network (NPRN); grant funded.
 - (£0.772m) Additional Pothole Action funding; grant funded.
 - £0.477m Devolved Formula Capital 2023/24; grant funded.
 - £0.500m Barrow Cemetery; internal funding.
 - £0.193m Strategic Highways Match Funding Integrated Transport Block (ITB) Funded; grant funded.
 - (£0.350m) Applethwaite Green Car Park, Windermere; internal funding.
 - (£0.351m) Strategic Highways and Transport; grant funded.
 - £0.693m Frenchfield Stadium Improvements; grant funded
 - £0.861m Highways & Transport Principal Road Network (PRN) Schemes; grant funded.
 - £0.268m Highways & Transport – Bridges & Structures; grant funded.
 - £1.596m Non-Principal Road Network (NPRN); additional grant funded.
 - £0.483m Highways & Transport Principal Road Network (PRN) Schemes; grant funded.
- (7) Approve Capital Programme virements within 2023/24 at Q2; £0.179m moves from the scheme noted 1 to scheme 2, and £0.613m from schemes 3,4,5,6 and 7 to scheme 8:
1. Virement from Major Projects Match Funding (£0.179m).
 2. Virement to Strategic Highways Match Funding (ITB Funded) £0.179m.
 3. Virement from IT Renewals (ex Eden) (£0.037m).
 4. Virement from Development Management System (£0.081m).
 5. Virement from IT Replacements (ex SLDC) (£0.318m).
 6. Virement from IT Development (ex Barrow) (£0.057m).
 7. Virement from Mobile Working (£0.120m).
 8. Virement to ICT Investment/Additional ICT Investment £0.613m.
- (8) approves the addition of new schemes to the Capital Programme of £1.794m:
- Youth Investment Fund £0.542m (grant funded).
 - Shipyard Town £0.549m (grant funded).
 - LEVI Infrastructure Fund £0.703m (grant funded).

(9) approves the reprofiling of the Capital Programme from 2023/24 to future years as detailed in Table 34 within the report:

- Reprofile (£1.186m) from 2023/24.
- Reprofile £0.961m to 2024/25.
- Reprofile £0.225m to 2025/26.

(10) approves the accelerated expenditure of the Capital Programme to 2023/24 from 2024/25 as detailed in Table 36 within the report:

- Accelerate £0.111m to 2023/24.
- Accelerate (£0.111m) from 2024/25.

For the reasons set out in this report, Cabinet is recommending that Council:

(11) approves the reduction of net budget by £5m to £263.478m. (see Paragraph 3.3 of the report);

(12) approves Approve the reprofiling of the Capital Programme from 2023/24 to future years as detailed in Table 31 within the report:

- Reprofile (£1.750m) from 2023/24.
- Reprofile £0.364m to 2024/25.
- Reprofile £0.462m to 2025/26.
- Reprofile £0.462m to 2026/27.
- Reprofile £0.462m to 2027/28.

(13) approves the accelerated expenditure of the Capital Programme to 2023/24 from 2024/25 as detailed in Table 33 within the report:

- Accelerate £1.528m to 2023/24.
- Accelerate (£1.528m) from 2024/25.

(14) notes the projected 2023-2028 Capital Programme of £310.691m at Quarter 2, consisting of directly delivered schemes at £296.374m, and accountable body schemes at £14.317m.

(15) notes the mid-year treasury management report.

97. INTERIM CORPORATE PERFORMANCE MONITORING REPORT - QUARTER 2 2023/24

The Leader of the Council presented a report which provided Cabinet with oversight of performance for Westmorland and Furness Council for Quarter 2 2023/24 (1 July 2023 to 30 September 2023).

The report suggested an overall positive position of performance at Quarter 2 2023/24 in the context of significant organisational change, transition and stabilisation into the new Westmorland and Furness Council.

The Leader said in the future, the Corporate Performance Report would be developed to include metrics aligned with the Performance Monitoring Framework (PMF) which would enable more effective oversight and scrutiny of delivery of the Westmorland and Furness Council Plan priorities.

However, until the PMF had been approved by Cabinet, the Corporate Performance Report would continue to use the same metrics as used in Quarter 1; which were aligned to the six Westmorland and Furness Council Plan priorities and focus on providing assurance against core service delivery and fulfilment of statutory responsibilities.

The report contained 67 interim performance metrics; a subset of the core metrics that previously supported corporate performance reporting across the four sovereign authorities. The metrics included both qualitative and quantitative performance information and provided a narrative update against progress.

Appendix 1 of the report provided individual performance updates for each key metric, categorised by Westmorland and Furness Council Plan priority.

Whilst every effort had been made to ensure accurate and robust data to support effective monitoring and scrutiny of performance, due to the complexity of integrating four different systems, process and practices the validity of the data cannot be guaranteed and ongoing data quality assurance is taking place wherever possible.

The overall position by the end of Quarter 2 2023/24 was that the majority, 35 of the 67 (52%) Westmorland and Furness Council Plan metrics were performing well, met or were on track to meet the planned milestone and rated green. A further 5 indicators (8%) were in progress and at risk of missing the milestone and rated amber. Finally, 10 indicators (15%) were expected to miss a key milestone or not fully deliver as intended and therefore rated red.

The Cabinet Member for Finance commented on the importance of the contents of the report, particularly how the Council reflect on how issues for residents and staff were dealt with and how emergencies were responded to. He noted that as a Council in the process of change that performance monitoring of services and reflecting on how the Council's values were being met was crucial. It was noted that as the Council move forwards, the data used would improve and provide a deeper understanding of the Council's performance.

The recommendation was moved and seconded and put to a unanimous vote.

RESOLVED, that Cabinet notes the overall performance relating to delivery of the six Westmorland and Furness Council Plan priorities against the Quarter 2 interim performance metrics.

98. SCHOOL FUNDING FORMULA 2024-25

Cabinet considered a report from the Director of Children's which set out the proposed arrangements for school funding in 2024/25 and updated them on the outcome of a recent consultation with schools.

On 17 July 2023 the Education Skills & Funding Agency (ESFA) announced details of the Dedicated Schools Grant (DSG) funding arrangements for 2024/25. This was subsequently amended on 6 October 2023 following the discovery of an error.

Local Authorities were obliged to consult their local schools and academies and Schools Forum on an annual basis regarding changes to school funding arrangements and whether to continue to apply the National Funding Formula (NFF). For 2024/25 the Department for Education (DfE) had placed further restrictions on local flexibility as it moved closer towards bringing in a direct NFF whereby individual maintained school and academy budgets would be set directly through one single NFF.

Local Authorities were allowed to transfer up to 0.5% of the Schools Block DSG to the High Needs block.

All schools in Westmorland & Furness were consulted on the school funding formula, and a proposed transfer to the High Needs block if there was sufficient funding, or the methodology to be applied in order to adhere to the principles of the NFF if the school funding formula was not sufficient.

At its meeting on 1 November Westmorland & Furness Schools Forum recommended that Cabinet, as the statutory decision maker on the formula through which funding was allocated to schools, should accept the recommendations outlined in this report.

In relation to the Schools Block Funding it was expected to increase from £155.509m to £163.400m, a gain of £8.611m, although the provisional allocation excluded funding for the Growth which had not yet been announced.

The provisional High Needs Block funding for Westmorland & Furness was £28.468m, an increase of £0.675m compared to 2023/24.

Despite the provisional increase in High Needs funding, there continued to be significant pressure on the High Needs Block budget, largely related to the increasing numbers of pupils with Education and Health Care Plans (EHCPs), the increasing number of pupils in specialist placements and the increasing costs of those settings.

Between the period April 2018 and March 2023 the total number of children and young people with an EHCP in Cumbria increased by a total of 1,527 to 4,456 which represented an increase of 52%.

The current number of pupils with an EHCP in Westmorland & Furness as at September 2023 was 2,513 (to be confirmed once disaggregation exercise has been completed) which represented 6.54% (tbc pending disaggregation exercise) of the total 2 to 18 year old population. However, the 2 to 18 year old population numbers had remained relatively static over the same period.

In addition to this, a significant proportion of the High Needs Block funding was based on historic spend in 2017/18 and therefore does not fully recognise the significant growth in the number of children and young people with SEND. For 2024/25 the provisional allocations indicated that £7.953m (29%) of the funding available would be based on the historic spend factor.

Pressure on High Needs budgets was a national issue. The Department for Education (DfE) had invested £300m through the Safety Valve Programme and were supporting 14 authorities with the largest deficits and working with a further 20 this year. It had also committed £85m in the Delivering Better Value in SEND programme, working with 55 authorities, including Westmorland & Furness which had received funding of £1m. However, the outcomes from this would take a while to unwind. The aim was to reach an in-year balanced position, although this would not be achieved in the first year of the programme.

With reference to the DSG Reserves, the main pressure on the Council's DSG reserves related to the deficit on the High Needs Block. As at 31 March 2023 there was a deficit on the High Needs Block earmarked reserve of £12.017m and as at Q1 budget monitoring the deficit on High Needs was projected to be £17.180m by 31 March 2024.

Cabinet Members thanked officers and the Cabinet Member for Children's Services, Education and Skills and officers for the detailed report and clear presentation. It was noted that Westmorland and Furness had good schools across the area and that exclusions being below the projected targets was a symbol of the positive work being done.

The recommendations were moved and seconded and put to a vote, which was unanimous.

RESOLVED, that Cabinet

- (1) allocates funding to schools and academies in Westmorland & Furness using the National Funding Formula in 2024/25;
- (2) after taking into account the growth fund budget, any residual balance up to a maximum of 0.5% to be transferred from the Schools Block into the High Needs block;
- (3) any balance remaining in the Schools Block after transfer of a maximum of 0.5% should be allocated to schools through the school funding formula and;

- (4) if the school funding formula is not affordable, the basic per pupil factor values in the formula will be reduced.

99. CONSIDERATION OF THE BIODIVERSITY DUTY

The Cabinet Member for Climate and Biodiversity presented a report which sought recognition that Westmorland and Furness Council was meeting the 'biodiversity duty' that was introduced in the Environment Act 2021.

As a public authority, the Council must evidence that it: consider what it can do to conserve and enhance biodiversity; agree policies and specific objectives based on its consideration; and act to deliver its policies to achieve these objectives.

The actions Westmorland and Furness Council would take through the biodiversity duty would contribute to the achievement of national goals and targets on biodiversity.

The Environment Act 2021 introduced the strengthened biodiversity duty for public authorities as a statutory approach to improving biodiversity in the UK. The Council must complete its first consideration of what action it would be taking for biodiversity by 1 January 2024.

The Council must agree the policies and objectives as soon as possible after the above date, and for Westmorland and Furness Council this would include due consideration of the Cumbria Local Nature Recovery Strategy, Biodiversity Net Gain and the Council's Biodiversity and Nature Action Plans (Part 1 and 2) due for publication in 2024.

This aligns closely to the council's ambition to be an exemplar organisation for nature recovery, striving to restore habitats, protect wildlife and combat climate change through collective action.

This year the council was committing £0.9m funding to support many partnerships in encouraging biodiversity enhancement and protection. Along with supporting newer schemes that linked in with green skills development and assessing our area's natural capital.

The council had also committed £0.51m to help prepare for Biodiversity Net Gain becoming mandatory, including employing three ecologists to help with the roll-out, exploring options for a biodiversity unit trading scheme, carrying out a land assessment of its land to see what biodiversity enhancement opportunities it had, as well as working with landowners for this purpose.

Tree Planting continued to be a major priority for the council, and it was working closely with the Cumbria Community Forest along with successfully bidding for the Coronation Living Community Tree Planting Fund.

The Cabinet Member for Sustainable Communities and Localities emphasised the importance of protecting the rare landscapes and species found within Westmorland and Furness, with every species and habitat being as important as the others within the ecological system. She expressed her support for the Council taking a leading role in nature recovery, striving to restore habitats, protecting wildlife and combating climate change.

The Cabinet Member for Customer and Waste Services acknowledged the importance of communities and individuals who were willing to contribute to enhancing biodiversity across the area. She noted that people engaging in the process would make a huge difference in the progress being made.

The recommendations were moved and seconded and put to a unanimous vote.

RESOLVED, that Cabinet

- (1) acknowledge the work being carried out by Westmorland and Furness Council to comply with the Biodiversity Duty and consider what it will do to meet our obligations to conserve and enhance biodiversity in our area.
- (2) note Westmorland and Furness Council's appointment as Responsible Authority for the Cumbria Local Nature Recovery Strategy, which feeds into the policies and objectives for meeting the biodiversity duty.

100. AFFORDABLE HOUSING GRANTS POLICY

Cabinet Members had before them a reports which sought to establish the Affordable Housing Grant Policy which would set out the governance and procedural requirements of Westmorland and Furness Council.

The Cabinet Member for Housing and Homelessness said Westmorland and Furness Council recognised the need for affordable housing and that was a key priority within the Council Plan. The provision of more affordable homes could help to increase the range of housing options, to help meet the increasing demand and assist the Council in meeting its required housing responsibilities.

The Council's funds for the Affordable Housing Grant provided an opportunity to add to other sources of funding available to local communities.

Eden District Council and South Lakeland District Council had both held Affordable Housing Reserves, and Community Housing Funds.

3.5 The Affordable Housing Reserve position at 1 April 2023 was £6.000m:

- £4.804m South Lakeland District Council
- £1.196m Eden District Council

There were several schemes identified against those reserves which fell into two categories; those that have formal approval from the legacy authority, and those that did not receive formal approval through the legacy sovereign councils' decision making processes and which it was proposed would be considered under the Westmorland and Furness Affordable Housing Grant Policy.

The value of the schemes identified at 1 April 2023 was £2.548m:

- £1.635 South Lakeland District Council
- £0.913m Eden District Council

The South Lakeland District Council Affordable Housing Reserve held the legacy share of capital receipts relating to the dwelling stock transferred to South Lakes Housing (SLH) in March 2012; the Council's share was a capital receipt which was ring-fenced for affordable housing.

Eden District Council and South Lakeland District Council both held Community Housing Funds (CHF). This was central government funding to support community led housing in areas where high levels of second home ownership were contributing to high housing costs and housing unaffordability. CHF could be spent on both capital and revenue items and could be used both for spending by the Council and by housing providers but the key criterion was that the housing it supported must be community led.

The Community Housing Fund position at 1 April 2023 was £1.644m:

- £1.177m South Lakeland District Council
- £0.885m Eden District Council

There were several schemes identified against those reserves which fell into two categories; those that have formal approval from the legacy authority via the governance arrangements that were in place at the time, and those without formal approval from the legacy sovereign authority that will be considered under the Westmorland and Furness Affordable Housing Grant Policy.

Affordable Housing Grant Delivery

Approved Grant Payments would be made in line with a Grant Agreement prepared by Legal Services. The new Affordable Housing Grant Policy for Westmorland and Furness Council offered an opportunity to consider how the Fund could best deliver the new Council Plan priorities. It also offered an opportunity to consider the resource implications of delivering the Fund alongside other priority programmes.

Westmorland and Furness Council was responsible for all elements of Affordable Housing Grant management from grant approvals, and in order to ensure the Council was able to provide effective and efficient programme management, it was recommended that the established internal Investment Board be used to oversee the approval of grant applications. Its role would include making recommendations on investment decisions, overseeing financial and performance management.

In order to ensure the Council was able to provide effective and efficient programme management of the Westmorland and Furness UK Shared Prosperity Fund, an internal Investment Board was established to oversee the delivery of the programme. Its role included making recommendations on investment decisions, overseeing financial and performance management and considering any required changes to the programme. The establishment of the Investment Board, and its Membership was approved by Cabinet at its meeting on the 24 April 2023.

The Terms of Reference (attached at Appendix B to the report) for the Investment Board had been updated to include grants from the Affordable Housing Policy.

It was recommended that the views of the Investment Board were provided to the relevant officers outlined in the amended Terms of Reference who would then have delegated responsibility in consultation with the Chief Legal and Monitoring Officer for making the award, entering into funding agreements and/or approving any scheme changes, in consultation with the Leader and Cabinet Member for Housing and Homelessness.

The proposed delegations were:

- Awards up to £50,000— grant award decisions to be made by the Senior Manager Housing Standards / AD Housing (ODR)
- Up to £100,000— grant award decisions to be made by the Assistant Director of Housing (ODR)
- Over £100,000 - Approval through Investment board (up to £500,000 ODR; £500,000 or above individual projects to be entered on Forward Plan and an Officer Key Decision Record completed).

Cabinet Members expressed their support for the policy and noted that affordable housing was a key aspiration of the Council. It was felt that the policy would support the Council's ambition in providing a mix of affordable housing to residents.

The recommendations were moved, seconded and put to a vote, which was unanimous.

RESOLVED, that Cabinet

- (1) approves the Affordable Housing Grant Policy attached at Appendix A of the report:
- (2) agrees the governance for grant awards as set out in Appendix A and delegate responsibility to the relevant officers outlined in Appendix A, in consultation with the Chief Legal and Monitoring Officer, the Leader and Cabinet Member for Housing and Homelessness to agree investment decisions and enter into grant funding agreements with successful projects.

101. URGENT ITEMS

None for this meeting.

The meeting ended at 11.23 am

WESTMORLAND AND FURNESS COUNCIL

Cabinet

Report Title	Scope 1,2,3 Baseline and Westmorland and Furness Council Carbon Management Strategy 2024-2029
Date of Meeting	23 January 2024
Report Author	Allan Harty - Assistant Director Corporate Assets, Fleet and Capital Programme
Director	Pam Duke – Director of Resources
Lead Cabinet Member	Cllr Peter Thornton – Cabinet Member for Highways and Assets
Why is this a key decision?	<p>1. an executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council’s budget for the service or function to which the decision relates. YES</p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are “significant” if they are equal to or greater than £500,000. YES</p> <p>For clarification, no treasury management decision shall constitute a Key Decision.</p>
Wards Affected	All
Identify exempt information and exemption category	None
Reasons for urgency (only where applicable)	None
Appendices (if any)	Westmorland and Furness Council Carbon Management Strategy

1. Executive Summary

- 1.1 This report outlines the Westmorland and Furness Council (WFC) Carbon Management Strategy (The Strategy) (see Appendix 1).
- 1.2 A series of delivery strategies are identified to reduce emissions from Council services in accordance with regional and national targets to reach Net Zero Green House Gas (GHG) emissions. All council directorates will have ownership of the successful delivery of the Strategy which will be coordinated by the decarbonisation programme team.

2. Recommendations

For the reasons set out in this report, Cabinet is recommended to:

- 2.1 Approve the Westmorland and Furness Council Carbon Management Strategy 2024-2029 (The Strategy) (See Appendix 1).

3. Information: the Rationale & Evidence for the Recommendations

- 3.1 The effects of Climate change pose a significant challenge to our eco system and communities. It affects the physical environment as well as all aspects of both natural and human systems – including social and economic conditions and the functioning of health systems. It poses threats to humanity globally and we have already seen and experienced the devastating impacts of it here in Cumbria with extreme weather events such as Storm Desmond in 2015.
- 3.2 Following COP21 in Paris in 2015, the Paris Agreement, a legally binding international treaty on climate change, was adopted by 196 Parties. This was agreed with the goal to limit global warming to below 2°C, preferably to 1.5°C compared to pre-industrial levels. In 2018, the UN's Intergovernmental Panel on Climate Change (IPCC) issued a special report on the impacts of global warming of 1.5c above pre-industrial levels, acting as a stimulus for Local Authorities to act on the 'climate emergency'.
- 3.3 In June 2019, the UK Government passed legislation committing it to achieving 'net zero' greenhouse gas emission by 2050. This was a significant change on the target set in 1990 of achieving an 80% reduction in emissions by 2050. In the UK, we have seen significant and encouraging legislative and policy developments in the last 2 years including the Environment Act 2021, UK Net Zero Strategy (UK Net Zero Strategy) and UK Hydrogen Strategy (UK Hydrogen Strategy).
- 3.4 Westmorland and Furness Council is a new unitary authority established on the 1st April 2023 and covers the areas previously administered by the former district councils of Barrow, Eden and South Lakeland in Cumbria and also encompasses the respective former functions of what was previously Cumbria County Council. The new unitary authority, like its predecessors, is committed to becoming carbon net zero and this commitment is reiterated in the Council Plan and its Climate Action Plan, Part 1 which was adopted by Cabinet on 11th July 2023 and the Climate Action Plan Part 2, considered separately by Cabinet today.
- 3.5 Westmorland and Furness Council has built upon the work of its predecessors by commissioning a comprehensive Carbon Emission Baseline Study covering all Council services, excluding its investments and pensions activity. The study has measured the total greenhouse gas (GHG) emissions generated by the operations of the Council and the services it delivers and provides measures to reduce these emissions.
- 3.6 The resulting Carbon Management Strategy 2024-2029 outlines emission reduction measures to achieve net-zero Buildings, Transport and Supply chain emissions, with action timelines to achieve net-zero Scope 1, 2 and 3 emissions by the respective target dates.

- 3.7 The study sets out the carbon emissions of the Council’s service operations between April 2019 and March 2020 (the baseline year) and breaks down the total greenhouse gas (GHG) emissions into Scope 1, 2 and 3 according to the GHG Protocol Guidelines published by the UK Government (See Table 1 below).
- 3.8 The Strategy provides a series of delivery workstreams aligned to the national ambition of meeting the Government’s net zero target for the UK by 2050 and the regional ambition of making WFC the first ‘carbon neutral’ county in the UK by 2037.
- 3.9 Westmorland and Furness Council is one of only a small number of local authorities in the country to undertake such an extensive piece of work, measuring not only Scope 1 and Scope 2 emissions but also Scope 3 emissions for the whole Council. The three types of GHG scope emissions are explained below:

Category	Description
Scope 1	Direct GHG emissions from buildings, plant and vehicles owned or controlled by the Council e.g. natural gas used in boilers or fuel used by company owned vehicles
Scope 2	Indirect emissions associated with purchased energy consumed by the Council e.g. grid supplied electricity
Scope 3	All other indirect emissions that occur in the Council’s supply chain e.g. business travel, purchased goods and maintenance contracts

Table 1: Definitions of Scope GHG emissions

Note. This report uses the term ‘tonnes of carbon dioxide equivalent’ or tCO₂e which is a metric measure used to compare the emissions from various greenhouse gases (GHG) on the basis of their global warming potential (GWP).

- 3.10 The study has recommended an ambitious but achievable target reducing carbon emissions to net zero carbon emissions for Scope 1 and 2 activities in accordance with regional ambitions by 2037, and to reduce all other emissions to net zero in accordance with national ambitions by 2050, or sooner. The baseline report states that achieving a net zero carbon position for Scope 1 and 2 emissions by 2037 is a challenging but feasible target and one that works within the requirements laid down by the Intergovernmental Panel on Climate Change (IPCC) for limiting warming to 1.5°c or below.
- 3.11 The Westmorland and Furness Council Carbon Management Strategy responds to the international, national and regional aspiration to achieve a low/net zero carbon economy and seeks to address the following key drivers:

- Climate Change - The UK Government has a commitment to reduce greenhouse gas emissions by the United Kingdom by 100% on 1990 levels by 2050. In May 2019, Parliament declared a 'climate change emergency', however this does not legally compel the government to act.
- Improve energy security - decreasing energy use and developing self-supply to decrease the reliance on purchasing energy from third-party sources e.g. through renewables.
- Investing in the local economy - investing in renewable energy not only provides business to local companies and creates new jobs but also develops new and existing local infrastructure.
- Improving quality of life for local residents - Cutting Carbon Dioxide Equivalent (CO₂e) and Nitrogen oxide (NO_x) emissions will improve the air quality in the local area and reduce ailments related to bad air quality, potentially leading to reduced cost of related health care.
- Saving money - savings can be made to the Council budget through reduced energy usage, cheaper energy supply, incentives and grants, and energy sales.
- Lead in delivering good practice - effective implementation of a challenging carbon management strategy will enhance organisational image and provide reputational benefits.

Key Findings

- 3.12 The Council's operations result in greenhouse gas emissions at Scope 1,2 and 3 levels of 84,551 tCO₂e. This is roughly equivalent to the annual carbon emissions of 9543 households.
- 3.13 Of the total emissions calculated, 13% (11,201 tCO₂e) of the baseline is attributable to Scope 1 and 2 emissions. These are largely the result of natural gas and electricity consumption in Council buildings, as well as Council-owned vehicle use. These are the emissions that the Council has the most influence over.
- 3.14 87% of the Council's total baseline is attributable to Scope 3 GHG emissions. This is significantly greater than the combined Scope 1 and Scope 2 emissions and reflects the magnitude of the services provided by the Council's supply chain, many of whom are based in Cumbria. The allocation between Scope 1, 2 and 3 emissions is reflective of analysis undertaken by the Carbon Trust.

Westmorland and Furness Emissions (Baseline Year 2019/20)

GHG Scope	Tonnes CO ₂ e	Proportion
Scope 1	7,474	9%
Scope 2	3,727	4%
Scope 3	73,350	87%
Total	84,551	100%

How do we get to a Net Zero position?

- 3.15 The Carbon management Strategy 2024-2029 identifies the key Council operational service areas producing the greatest emissions. This allows for the identification of a clear approach to reduce, and ultimately move the Council's emissions, towards a Scope 1 and 2 net zero carbon position by 2037 and Scope 3 emissions by 2050, or sooner.
- 3.16 To achieve net zero CO₂e, emissions should be reduced in line with the energy hierarchy where the priority is to reduce energy demand followed by improving efficiency and then integrating renewable energy sources. Any remaining emissions can then be inset by renewable energy generation on Council owned land and buildings. The energy hierarchy is:
- **Prevent** – the need for energy consumption by ensuring that the wastage is avoided or reduced.
 - **Reduce** – the amount of energy consumed by the upgrade of the current building systems and equipment to equivalent and more efficient systems
 - **Recover** – ‘used’ energy and resources and re-use where there is an opportunity
 - **Replace** – the energy consumed with renewable energy supply options.
- 3.17 The overall strategy identifies four delivery workstreams to address the core areas of emissions:
- Buildings Emission Management** – Scope 1 and 2 emissions associated with the operation and management of corporate buildings and schools which are signed up to the corporate energy contracts across the whole of the Council's geographic area. This strategy focuses on behaviour changes, building fabric improvements, energy reduction measures, Improvements to building management systems and Installation of renewable energy on buildings (where appropriate).
- Transport Emission Management** – Management of the Scope 1, 2 and 3 emissions that are applicable to operation and management of both the plant, equipment and vehicles directly owned and operated by the Council and a strategy for the emissions associated with staff commuting and the use of personal cars for business trips. This strategy includes improved management processes and travel analysis, upgrading the electric charging infrastructure and adoption of appropriate new fuels and technologies to operate a fleet of vehicles.
- Scope 3, Supply Chain Emissions Management** – This is associated with the purchases and contracts required for the operation and delivery of the Council's services, in particular, delivery of the capital programme (including highways contracts) and the operation of care services. The adopted strategy will focus on upskilling and behaviours, measuring carbon through calculators

and reporting and procurement and contractual incentives and disincentives to promote decarbonisation.

The Councils approach to strategic commissioning, procurement and ensuring social value across all our services will contribute to developing a framework to encourage the reduction of our suppliers Scope 1 & 2 GHG emissions, therefore reducing our Scope 3 GHG emissions.

Residual emissions – The proposed building and transport Energy Reduction Measures will electrify the Council’s building energy demand and the majority of its fuel demands, leaving residual Scope 1 & 2 emissions of 5,658 tCO₂e due to electricity usage (5,275 tCO₂e), gas use in older buildings (275 tCO₂e) and HVO fuel consumption (108 tCO₂e).

The strategy is predicated on the UK governments commitment for the UK to decarbonise its electricity system by 2035. If the grid decarbonises as planned by 2035 the carbon produced by remaining gas boilers and HVO-fuelled vehicles, can be met by the 4MW of solar power currently under development, or, alternatively, by planting 25.1ha of trees.

In the event that the grid does not decarbonise by 2035, or is only partially decarbonised, the Council may need to invest in more extensive carbon in-setting measures to achieve Net-Zero Scope 1 & 2. As a worst case, this would include the development of a further 10MW of renewables generation and 60 hectares of tree planting.

The use of the baseline year of 2019/20 leads to a situation where the Council has already started work on reducing its carbon emissions with several workstreams ongoing to understand and reduce emissions. The Council has undertaken the following key activity:

- Commissioned a Carbon Management Strategy, Baseline and Action plan,
- Commissioned targeted decarbonisation plans for the 25-30 highest emitting buildings,
- Applied for £1m funding for energy reduction measures in three leisure centres (Barrow, Penrith and Appleby),
- Recruited a team of 3 FTE decarbonisation focused staff to drive the programme forward,
- Signed a contract to deliver 2MW of solar infrastructure in Barrow, due for construction by June 2024,
- Commissioned studies for a further 2 MW of solar infrastructure,
- Developed a Building Decarbonisation Policy (to be considered Council in 2024).

Governance

- 3.18 It is estimated that to reach a net zero position for Scope 1 and 2 emissions by 2037, that an estimated total capital expenditure of approximately £26m, which equates to just over £2m annually. When all the reduction measures are complete, the estimated cost savings will be approximately £8.2m/year based on a generalised model across buildings (including some maintained schools)

and transport/fleet functions within the Council. The largest savings are generated from replacement of electricity costs via installation of Solar PV on buildings, and replacement of fuel costs within council vehicles converting to electric vehicles.

- 3.19 Any savings are dependant on many factors including prevailing energy costs at the time and are generated from a common cost of energy, which is currently high. Ultimately, any savings will be presented in detail within individual project business cases. It is anticipated that government funding for local authorities i.e., grants for Leisure Centres and Public Sector Decarbonisation Schemes (PSDS) could be used to offset in part the cost of the projects.
- 3.20 Potential decarbonisation work packages will be developed into detailed business cases in accordance with the development timescales in the strategy. Approval of business cases and any investment decisions will follow the Council's established capital programme development approach and financial planning.

Risks

- 3.21 The carbon reduction strategy relies on the future decarbonisation of the national grid. A slowdown of this rate will reduce the amount of CO₂e savings made by some building interventions including the installation of heat pumps, though will increase the amount of CO₂e offset by renewables. An assumption is made that the National Grid will further decarbonise up to 2050 and beyond as national legislation is fully implemented. This strategy highlights the additional measures which will need to be undertaken should the grid fail to decarbonise on time.
- 3.22 Cost savings and revenue generation associated with Energy Reduction Measures (ERM) are related to changes in electricity and natural gas prices which are still highly volatile. Increases in natural gas price increases potential savings and improves the economic case for fossil fuel reduction. An increase in the projected electricity price will negatively affect the economics of installing, for example, heat pumps. Offsite generation will benefit from an increase in the price of wholesale electricity and achieve a shorter payback period on initial capital investment. The Councils decarbonisation team will keep energy prices under review and use the latest information from government sources, including the Department for Energy Security and Net Zero to inform decision making at business case stage.
- 3.23 Capital investment will increase and decrease with project complexity; issues include electricity connections and diversions, planning restrictions and building alterations for large scale building works or renewable projects. Specific risks associated with each individual project will be considered upon establishment of individual business cases by the Councils in house Capital Programme Team.
- 3.24 Market demand for skills and resources to deliver the decarbonisation programme is high. Securing the appropriately skilled resources, particularly focused on renewable project delivery and building energy management has been difficult with supply chain partners also citing over capacity. Securing

materials, for example solar panels where global demand will be high is also a risk to project delivery as the national decarbonisation programme is fully delivered. This risk will be mitigated through ongoing recruitment programmes as well as detailed project planning to consider lead in period for short supply materials.

4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)

4.1 The Council Plan for Westmorland and Furness Council was adopted in April 2023 when the new Council came into being. The plan sets out the council's vision, values and priorities for the next 5 years of its operations. The plan states that the Council will be at the 'forefront of tackling climate change and the challenges it presents. We will provide leadership in the drive to become carbon net zero'. The Carbon Management Strategy underpins one of the key priorities detailed in the Council Plan, which is; *'to ensure that the area we serve becomes carbon net zero by 2037, and our organisation, as soon as possible'*.

4.2 The Council Plan is supported by the **Delivery Plan Framework** which sets out the key projects the Council plans to carry out during the year and what it aims to achieve. The Carbon Management Strategy will help the Council deliver on aspects relating the strategic delivery themes of **Environment, Growth and Connections** by underpinning and supporting the following;

- the development of a solar farm in Barrow
- the rolling out of Carbon Literacy training for all staff and elected members
- supporting growth in the clean energy sector and helping businesses to decarbonise
- encourage people to travel sustainably
- support the transition to electric and other non oil-based vehicles
- developing a plan for maintenance and improvements of roads using sustainable practices by working with the supply chain
- supporting the roll out of electric vehicle charging infrastructure

4.3 The Council agreed it's Climate Action Plan Part 1 in July 2023. The plan lays the foundation of the Council's drive to respond to Climate Change. The plan focusses on 6 categories to tackle climate change and achieve net zero

- The way we live
- The way we work
- The way we produce energy
- The way we protect nature
- The way we use things
- The way we travel

4.4 Key items detailed in the **Climate Action Plan Part 1** and directly relevant to the Carbon Management Strategy include;

- Building fabric improvements
- Energy reduction measures
- Renewable energy and decarbonisation
- Investment in renewable energy to help the Council decarbonise its electricity supply; and
- the development of Local Cycling and Walking Infrastructure Plans.

4.5 **Climate Action Plan Part 2** has been co-designed by departments across the Council, to identify suitable actions to reduce emissions, reduce environmental inequalities and create a climate positive Council culture, building on the Council's 'ecologically aware' value.

The Action Plan sets out the Council's themes of climate action which have been designed to ensure there will be co-benefits to the Council's climate action. The plan identifies projects, policies, initiatives and process changes the Council will undertake to provide leadership in the goal for a Net Zero Westmorland and Furness.

Consultation Outcomes

4.6 The Climate and Nature directorate have been involved and consulted with, throughout the development of the Carbon Management Strategy 2024-2029, to ensure the alignment of the strategy with the Climate Action Plan Parts 1 and 2

5. Alternative Options Considered

Option (a) – Recommended - Approve the Westmorland and Furness Council Carbon Management Strategy 2024-2029.

Option (b) Approve the Westmorland and Furness Council Carbon Management Strategy 2024-2029 with amendments.

Option (c) Do nothing – take no action and wholly rely on the decarbonisation of the national grid and other legislative changes (i.e., the phasing out of Diesel vehicles over time). This would not address the significant carbon emissions from the Councils activities Or meet the ambitions of the Council Plan. This option is not recommended.

6. Financial Implications and risk

6.1 There are no direct financial implications of the recommendation contained within this report. The Carbon Management Strategy 2024-2029 will provide a strategic approach to achieve net-zero Buildings, Transport and Supply chain emissions, with action timelines to achieve net-zero Scope 1, 2 and 3 emissions by the respective target dates.

6.2 The strategy states a requirement of an estimated £26m investment to deliver the workstreams required to meet Scope 1 and 2 net zero reductions. If the strategy is approved, detailed business cases for investment will be developed.

- 6.3 By 2037 cost savings of c£8m per annum may be achievable, however this is an estimate and the detailed cost savings will be drawn out as part of individual business cases for investment.

Approval of business cases and investment decisions will follow the Council's established capital programme development approach and will form part of the Council's annual financial planning process.

7. Legal and Governance Implications

- 7.1 Under Section 111 of the Local Government Act 1972 the Council has powers to do anything that is calculated to facilitate, or which is conducive or incidental to, the discharge of its functions. Section 2(1) Local Government Act 2000 enables local authorities to do anything that they consider likely to promote or improve the economic, social and environmental well-being of their area.
- 7.2 It is recommended that in due course legal advice be taken in relation to delivery and implementation of the workstreams and decarbonisation work packages referred to in the report. Arising projects will follow due process. Legal advice relating to the work packages, and any arising projects, will be provided on a case-by-case basis and may include, for example, advice regarding statutory compliance, procurement, contracting and grant funding advice, advice relating to consultation, equalities impact assessments and compliance with the public sector equality duty.
- 7.3 As outlined in paragraph 3.20 above, in relation to governance, the arising potential work packages are to be developed in accordance with the Finance Procedure Rules relating to Capital Programme Development (rules 2.21-2.24).

8. Human Resources Implications

- 8.1 The Carbon Management Strategy 2024-2029 will require significant funding and resource effort to enable the delivery of the future projects and interventions necessary to reduce the levels of Green House Gas emissions to the levels recommended.
- 8.2 A decarbonisation team is formed alongside the Council's property, assets and fleet functions and are well placed to deliver the interventions needed, e.g. on the Council's building estate. The team will appoint external support through consultancy and works contracts using appropriate procurement routes. The team have recently recruited a further two members of staff to assist the delivery of this function and the appointment of the roles are supported by the HR team.
- 8.3 Achievement of goals set out within the Strategy will also require culture change, and alignment to the Council's People Plan, ensuring our HR policies, procedures and practices reflect the ambitions of the Council's Carbon Management Strategy.

9. Equality Implications (including the public sector equality duty, Armed Forces Families, Care Leavers and Health inequalities implications)

- 9.1 From an initial assessment there are no adverse equality impacts on any part of the community. However, it is widely acknowledged that carbon emissions have, and will continue to have, a harmful impact on the environment in which we live. This, in turn, has a harmful impact on health and wellbeing of our communities and will impact those on lower incomes and with poorer health the hardest. The Council has an important leadership role in Carbon Management, it is therefore vital that the Council clearly communicates the benefits of managing energy and reducing carbon emissions to improve health and wellbeing and reduce health inequalities.

10. Background Documents

None

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Westmorland
& Furness
Council

Carbon Management Strategy

2023

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Carbon Management Strategy 2024-29 (Westmorland and Furness Council)

#10
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Glossary

Acronym	Meaning
AC	Air Conditioning
AHU	Air Handling Unit
ASHP	Air Source Heat Pump
BMS	Building Management System
CAfS	Cumbria Action for Sustainability
CCC	Cumbria County Council
CES	Clean Energy Strategy
CLEP	Cumbria Local Enterprise Partnership
DHW	Domestic Hot Water
EV	Electric Vehicle
GHG	Green House Gas
HVAC	Heating, Ventilation and Air Conditioning
HVO	Hydrotreated Vegetable Oil
IPCC	Intergovernmental Panel on Climate Change
PV	Photovoltaic
tCO ₂ e	Tonnes of Carbon Dioxide Equivalent
WFC	Westmorland and Furness Council

Definitions

Carbon Neutral – This is the position where the CO₂ released by an organisation is balanced by an equivalent amount being removed or mitigated.

CO₂e – A quantity that measures the global warming potential of any mixture of greenhouse gases using the equivalent amount or concentration of carbon dioxide.

Decarbonisation – The reduction of the carbon emissions from an energy system.

Greenhouse Gases (GHGs) – These are the seven major Greenhouse Gases. These are, with their respective Greenhouse Warming Potentials:

Carbon Dioxide (CO ₂)	GWP 1
Methane (CH ₄)	GWP 23
Nitrous Oxide (N ₂ O)	GWP 296
Hydrofluorocarbons (HFC)	GWP 77 to 14,800
Perfluorocarbons (PFC)	GWP 6,500 to 12,200
Sulphur Hexafluoride (SF ₆)	GWP 22,200
Nitrogen Trifluoride (NF ₃)	GWP 8,000

Insetting – The reduction of emissions by the implementation of measures such as re-forestation, renewable energy and restorative agriculture within an organisation's own management scope.

Net-Zero – When an organisation has achieved a position where the effects of its activities are such that they have no net increase in the carbon emissions released into the atmosphere.

Offsetting – The purchase of a tradeable unit, representing emissions rights or emissions reductions, to balance the climate impact of an organisation, activity or individual. Although they can be stored and traded like a commodity, they are not material objects; offset credits are not literally 'tonnes of carbon'; but stand in for them and are better regarded as intangible assets or financial instruments. To act as an offset, units must be cancelled to represent a reduction and prevent further trading.

Residual Emissions – The estimated emissions left after the emissions reduction measures have been implemented.

Grey Fleet - Use of an employee's private vehicle for business use.

Executive Summary

Climate change remains the challenge of our generation. It is one of the greatest threats to humanity globally and we have already seen and experienced the devastating impacts of it here in Westmorland and Furness with extreme weather events such as Storms Desmond (2015), Ciara (2020) and Arwen (2021).

Despite concerted efforts from international governing bodies to slow the rate of climate change, carbon forecasts and the attitudes of such bodies towards the issue suggest that the rate of decarbonisation will not outpace that of climate change. It is increasingly apparent that we cannot simply rely on these larger institutions to invest in large scale renewable energy generation and carbon offsetting projects to slow global warming and contain the problem of climate change. We must take action locally. We must adopt a low-carbon culture and make every effort to minimise their energy usage and wastage, to ensure that any goods and services are sourced from low-carbon providers and any energy used is supplied by renewables.

Westmorland and Furness Council is a new unitary authority established on 1st April 2023 and covers the areas previously administered by the former district Councils of Barrow, Eden and South Lakeland in Cumbria. It also encompasses the former functions of what was previously Cumbria County Council. The new unitary authority, like its predecessors, is committed to becoming carbon Net Zero and this commitment is reiterated in the Council Plan and its Climate Action Plans.

Building on the work of its predecessors, we commissioned a comprehensive Carbon Emission Baseline Study covering all of the Council's assets and services, excluding pensions and investments. The study looked to measure the total greenhouse gas (GHG) emissions generated by the operations of the Council and the services it delivers and provide measures to reduce these emissions.

This is aligned to the national ambition of meeting the Government's Net Zero target for the UK by 2050 and the regional ambition of making Cumbria the first Net Zero carbon county in the UK by 2037.

This study also outlines emissions reduction measures to achieve Net Zero buildings, transport and supply chain emissions, with action timelines to achieve Net Zero Scope 1, 2 and 3 emissions by the respective target dates. These action timelines will be further developed through individual business case development.

The three categories of GHG scope emissions are explained below:

Category	Description
Scope 1	Direct GHG emissions from buildings, plant and vehicles owned or controlled by the Council e.g., natural gas used in boilers or fuel used by company owned vehicles
Scope 2	Indirect emissions associated with purchased energy consumed by the Council e.g., grid supplied electricity
Scope 3	All other indirect emissions that occur in the Council's supply chain e.g., business travel, purchased goods and maintenance contracts

Table 1: Definitions of Scope GHG emissions

Due to the impact of Covid-19 on the Council's operations and the services provided, a baseline year of April 2019 to March 2020 was chosen as the reference period as it was considered representative of the normal operations of the Council and services it provides.

This baseline year is also considered to be more representative of the Council's operations moving forward, as the 2020-2021 and 2021-2022 periods would likely see markedly lower emissions related

to travel, due to the effects of Covid-19. The findings of the carbon emissions baseline study have been summarised in Figures 1 and 2 below.

The report sets out to summarise the greenhouse gas (GHG) emissions of the Council's operations between April 2019 and March 2020 and breaks down the total into Scope 1, 2 and 3 according to the GHG Protocol Guidelines published by the UK Government. In this report the total GHG emissions are collectively referred to as tonnes of carbon dioxide equivalent (tCO₂e).

The total emissions reported during the Council's baseline period is 84,551 tCO₂e.

Of the total emissions calculated, 13% (11,201 tCO₂e) of the baseline is attributable to Scope 1 and 2 emissions. These are largely the result of natural gas and electricity consumption in Council buildings, as well as Council-owned vehicle use. Decarbonisation curves to achieve net-zero buildings and transport by 2037 have been developed along with programmes of activities to achieve the Council's objective of net zero Scope 1 and 2 emissions by 2037.

87% of the Council's total baseline are attributable to Scope 3 GHG emissions. This is significantly greater than the combined Scope 1 and Scope 2 emissions and reflects the magnitude of the services provided by the Council's supply chain, many of whom are based in Cumbria. The allocation between Scope 1, 2 and 3 emissions are reflective of analysis undertaken by the Carbon Trust.

The distribution of emissions across each scope type is shown in Figure 1 and broken down further in Table 1. The three most significant sources of emissions were:

1. Buildings - including schools, care homes and offices
2. Transport - including staff travel and fuel use in fleet vehicles
3. Supply chain - including emissions from Capital Programme (including highways, suppliers and external care suppliers)

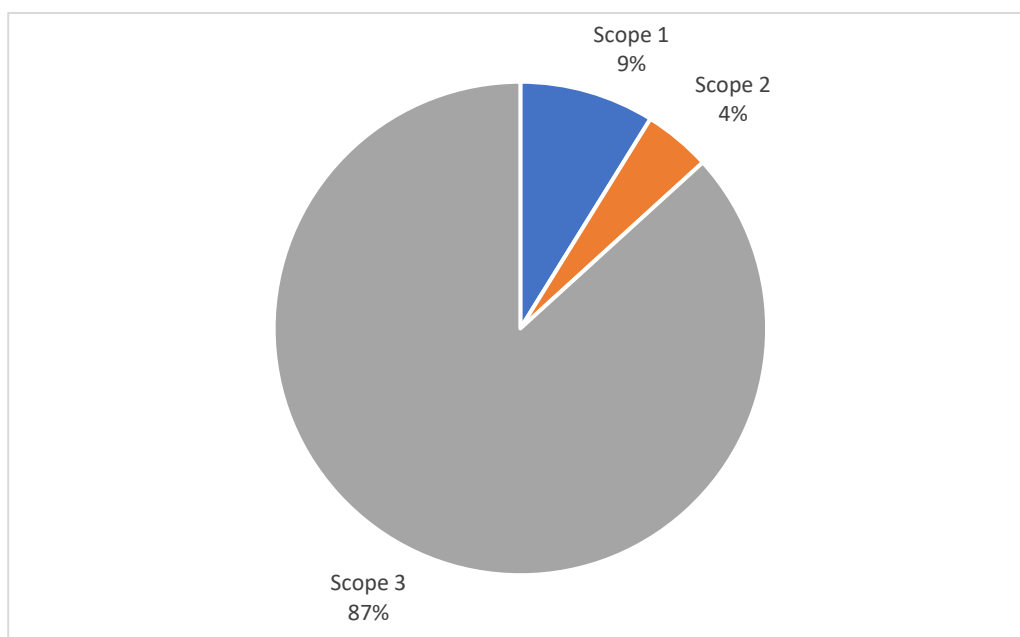


Figure 1: Scope 1, 2 and 3 overview.

GHG Scope	Tonnes CO2e	Proportion
Scope 1	7,474	9%
Scope 2	3,727	4%
Scope 3	73,350	87%
Total	84,551	100%

Table 2: WFC's Scope 1, 2 and 3 emissions breakdowns

The building and transport emissions reduction workstreams are proposed to deliver significant reductions in energy consumption and the associated carbon emissions. The workstreams will, where possible, electrify sources of energy usage, providing a route to net zero by supplying this energy demand through renewables. Where electrification is not possible (i.e., in some larger vehicles), alternative fuel technology could be utilised. Electrification of the fleet and use of alternative fuels such as HVO, will be further defined in a Fleet Management Strategy

Implementing this strategy leaves 5,658 tCO₂e of residual Scope 1 and 2 emissions associated with electricity consumption in buildings and EVs (5,275 tCO₂e), gas consumption in older buildings (275 tCO₂e) and HVO fuel use (108 tCO₂e). Currently, the UK Government has made a commitment to completely decarbonise the national electricity grid by 2035, although in September 2023 the government scaled back some commitments in relation to Net Zero, specifically with regards to the sale of petrol and diesel cars and gas boilers. If the government's commitment remains on track, the Council's electricity demands can be met by green energy from the grid, eliminating the 5,275 tCO₂e produced due to electricity consumption. The remaining 383 tCO₂e, produced by gas boilers and HVO-fuelled vehicles, can be met by the 4MW of solar power currently under development. to achieve Net-Zero Scope 1 & 2 by 2037.

If the grid does not decarbonise by 2037, the Council may have to invest in additional renewable energy generation projects and tree planting measures to eliminate the residual emissions. Considering the worst case, whereby the grid does not decarbonise at all, 10.18 MW of solar farms and 60 hectares of tree planting could be required to offset the full 5,658 tCO₂e of residual emissions and achieve Net-Zero for Scope 1 and 2 in 2037. It is recommended that the review date of this Carbon Management Strategy is a maximum of 3 years, but this may be sooner if technological advances or legislation require it. As such, a more refined position on the need for further inseting may be reviewed in 2027.

For Scope 3, supply chain management workstream, and the projected decarbonisation of the supply chain between 2024 and 2050, have been modelled.

Introduction

Local authorities consume over 26 billion kWh of energy per year¹, resulting in annual CO₂e emissions of more than 6.9 Mt CO₂e. As of 2019, more than half of the UK's principle local authorities have declared a climate emergency.

Energy use is a major expenditure for local authorities at a total cost of around £750 million. Local authorities are therefore well placed to influence the national goal of developing a net zero carbon economy, with the added benefit of making significant savings on expenditure and achieving long term security.

Context

Following COP21 in Paris in 2015, the Paris Agreement, a legally binding international treaty on climate change, was adopted by 196 Parties. This was agreed with the goal to limit global warming to below 2, preferably to 1.5 degrees Celsius compared to pre-industrial levels. The initial target of below 2°C is increasingly being deemed as insufficient, with climate change institutions, such as the Science Based Targets Initiative², no longer accepting targets that are aligned with the below 2°C scenario.

In 2018, the UN's Intergovernmental Panel on Climate Change (IPCC) issued a special report on the impacts of global warming of 1.5°C above pre-industrial levels, acting as a stimulus for Local Authorities to act on the 'climate emergency'. The report stated that in order to remain within a 1.5°C increase, governments must cut greenhouse gas emissions (globally) by 45% by 2030. This was followed up in 2021 with a landmark study by the IPCC in which the report was called a 'code red for humanity'², warning that we are at imminent risk of hitting 1.5°C in the near future.

In June 2019, the UK Government amended the Climate Change Act of 2008³ to commit the UK to 'net zero' for greenhouse gas emissions by 2050, reducing the UK's net emissions by 100% relative to 1990 levels. This was a significant change on the target set in the original act in 2008 that committed the UK to an 80% reduction of GHG emissions by 2050, compared to 1990.

¹ <https://www.apse.org.uk/sites/apse/assets/File/Mark%20Bramah%20-%20Session%203.pdf>

² <https://sciencebasedtargets.org/news/sbti-raises-the-bar-to-1-5-c>

³ https://www.legislation.gov.uk/ukpga/2008/27/pdfs/ukpga_20080027_en.pdf

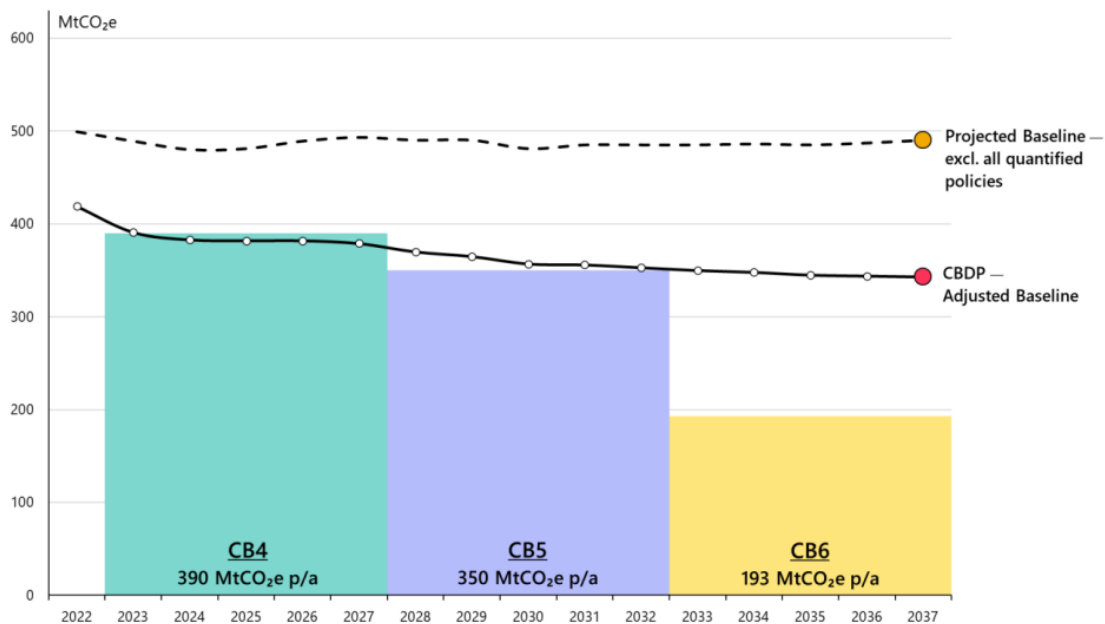


Figure 1: UK Carbon Budgets 2023 – 2037 (Carbon Budget Delivery Plan 2023)

As part of the Climate Change Act 2008, five yearly carbon budgets were fixed which set a cap on the total GHG emissions in order for the UK to meet its overall commitments. Figure 2 shows the 6th Carbon Budget (CB6) for the UK which applies to the period 2033 - 2037.

In the UK, we have seen significant and encouraging legislative and policy developments in the last few years including the Environment Act 2021⁴, UK Net Zero Strategy⁵ and UK Hydrogen Strategy⁶, as well as ambitious carbon budgets set for the 2023-2037⁷ period (Figure 3) and a commitment to total UK electricity grid decarbonisation by 2035⁸.

⁴ https://www.legislation.gov.uk/ukpga/2021/30/pdfs/ukpga_20210030_en.pdf

⁵ <https://assets.publishing.service.gov.uk/media/6194dfa4d3bf7f0555071b1b/net-zero-strategy-beis.pdf>

⁶

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1175494/UK-Hydrogen-Strategy_web.pdf

⁷ https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147369/carbon-budget-delivery-plan.pdf

⁸

https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/1147457/powering-up-britain-net-zero-growth-plan.pdf

Methodology

In order to properly evaluate the route to achieving Net Zero emissions, we commissioned a study to assess:

- The current GHG Emissions Baseline of the Councils operational service activities against which Net Zero should be measured.
- Appropriate emissions reduction measures for each service area in order to achieve Net Zero emissions.
- Techno-economic considerations associated with each emissions reduction measure identified and evaluated.
- The financial and economic benefits of achieving Net Zero emissions.
- Stakeholder engagement considerations required to achieve Net Zero emissions across the supply chain and other areas.

Policy

The Council Plan

The Council Plan was adopted in April 2023 when the new Unitary Authority was established. The plan sets out the Council's vision, values and priorities for the next five years of its operations. The plan states that the Council will be at the *'forefront of tackling climate change and the challenges it presents. We will provide leadership in the drive to become carbon net zero'*.

This study underpins one of the key priorities detailed in the Council Plan, which is; *'Westmorland and Furness Council is working hard to ensure that the area we serve becomes carbon net zero by 2037, and our organisation, as soon as possible'*.

Council Plan Delivery Framework

The Council Plan is now supported by the Delivery Plan Framework which sets out the key projects the Council plans to carry out during the year and what it aims to achieve. This Carbon Management Strategy will help the Council deliver on aspects relating to the strategic delivery themes of **Environment, Growth and Connections**.

Climate Action Plans Part 1 and 2

The Council has taken significant steps towards becoming a Net Zero Council with the development of Climate Action Plans Part 1 and the emerging Climate Action Plan Part 2. The Climate Action Plans provide the steppingstones to the Council becoming carbon Net Zero as soon as possible and the area it serves, carbon Net Zero by 2037. The Carbon Management Strategy links directly to the Climate Action Plans, with its aim to decarbonise the estate and investment in renewable energy.

Part One

The Council agreed its Climate Action Plan Part One in July 2023. The plan *'lays the foundation of the Council's drive to respond to the climate emergency and aim to deliver net zero for Westmorland and Furness by 2037'*.

The plan focusses on six categories to tackle climate change and achieve net zero:

- The way we live.
- The way we work.
- The way we produce energy.

- The way we protect nature.
- The way we use things.
- The way we travel.

Part Two

The emerging part two of the Action Plan has been co-designed by departments across the Council, to identify suitable actions to reduce emissions, reduce environmental inequalities and create a climate positive Council culture, building on the Council's 'ecologically aware' value.

The Action Plan sets out the Council's themes of climate action which have been designed to ensure there will be co-benefits to the Council's climate action. The plan contains over 100 actions, in the form of projects, policies, initiatives and process changes the Council will undertake to provide leadership in the goal for a Net Zero Westmorland and Furness.

Cumbria Clean Energy Strategy (CES) 2022

Cumbria Local Enterprise Partnership (CLEP)⁹ have identified two strategic priorities of focus as part of the overall achievement of net-zero:

Clean Energy Generation

- Offshore Wind
- Nuclear
- Hydrogen / CCUS
- Renewables

Business Decarbonisation

- Energy Efficiency/optimisation
- Switch to low carbon energy sources

The focus of the CES is on clean energy generation. This includes the decarbonisation of buildings, transport, industry and the natural environment and is being taken forward through aligned strategies, including CLEP's 10 Point Business Decarbonisation Plan. The Clean Energy Strategy provides stakeholders with a comprehensive assessment of how a wide range of clean energy opportunities could be deployed in Westmorland and Furness in alignment with government policy.

The delivery of the CES will be led by the CLEP and overseen by the Clean Energy Sector Panel, working in partnership with investors, developers and operators to drive positive economic, social and environmental outcomes.

Carbon Baseline Report

In April 2019, WFC's predecessors and the Lake District National Park Authority formally adopted the Cumbria Joint Public Health Strategy. Incorporated within this strategy is the following aim: 'To become a "carbon neutral" county and to mitigate the likely impact of existing climate change'.

The Cumbria Climate Change Working Group came together in 2020 to work towards this aim. This group will:

- Propose a shared definition of 'carbon neutral'.
- Propose a target date by which this is to be achieved (that is in line with a maximum warming of 1.5°C).

⁹ https://www.thecumbrialep.co.uk/resources/uploads/pages/net_zero/2208-CumbriaCleanEnergyStrategy.pdf

- Commission an independent baseline carbon audit for the County and agree ongoing monitoring mechanisms.
- Identify leadership for developing action across key topics and sectors.
- Establish a programme of action by key partners.
- Lead joint campaigning to encourage wider public awareness and action.
- Propose a target and pathway to achieve net zero carbon in Cumbria.

The 2020 Carbon Baseline study recommended the ambitious yet achievable target of 2037 to reach Net Zero carbon position for Cumbria. The report states that this is the most feasible target that also complies with the requirements laid down by the IPCC) for “limiting warming to 1.5 degrees or below” to curb current global warming trends.

Project Drivers

To deliver this programme to achieve net zero, we have identified a number of local drivers:

- Climate emergency - in addition to the need for reduction in energy use and the investment in renewable energy, the Council has declared a climate emergency, stating that attention is needed to combat climate change above that of which is currently suggested by the government.
- Improve energy security – decreasing energy use and developing self-supply to reduce the reliance on purchasing energy from third-party sources.
- Investing in the local economy - investing in renewable energy not only provides business to local companies and creates new jobs but also develops new and existing local infrastructure (e.g., biomass fuel supply chains).
- Improving quality of life for local residents - cutting CO₂e and NO_x emissions will improve the air quality in the local area and reduce ailments related to poor air quality, potentially leading to reduced cost of related health care.
- Saving money - savings can be made to the Council budget through reduced energy usage, cheaper energy supply, incentives and grants, and energy sales.
- Lead in delivering good practice - effective implementation of a challenging carbon management strategy will enhance organisational image and provide reputational benefits.

Influence

According to the Climate Change Committee, local authorities have direct control over between 2-5% of their local area's emissions and have powers or influence over roughly a third of emissions in their local areas. The Council has the ability to **directly control** its own emissions (i.e., Scope 1 and 2) but only has a **weak influence** over Scope 3 emissions, with the ability to encourage reductions of Scope 3. As many of these Scope 3 emissions are supplier's Scope 1 and 2 emissions, these emissions will prove the most challenging to reduce as their sources are largely out of the Councils control.

However, through strong engagement with the supply chain, developing frameworks, adjusting KPI metrics and updating procurement processes, the Council can influence its suppliers to minimise emissions for which they have direct control over i.e., the supplier's own Scope 1 and 2 emissions.

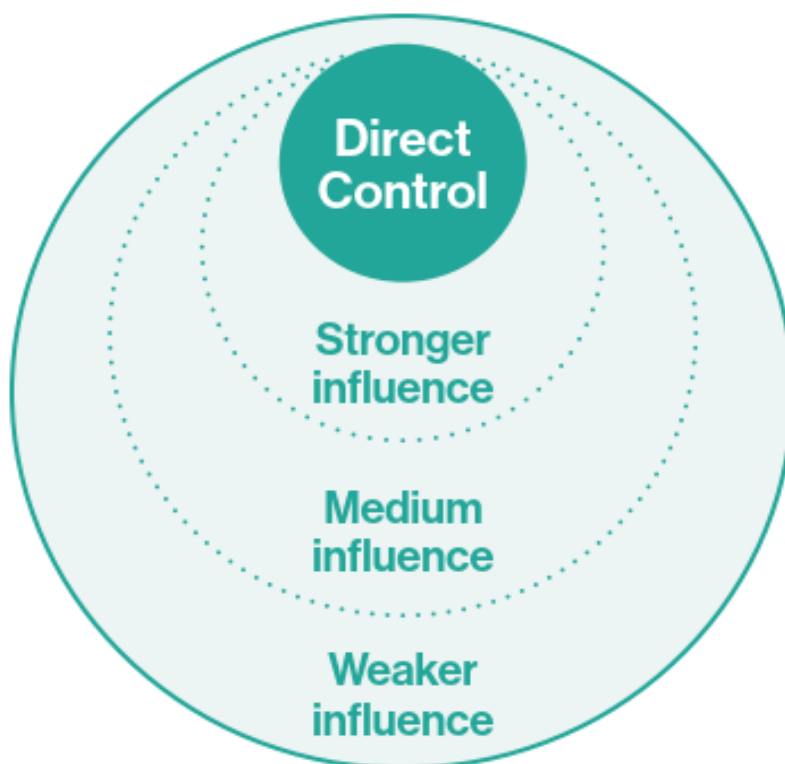


Figure 2: Spheres of Influence (Cumbria Carbon Management Strategy)

Scope	Influence
1	Direct control
2	Direct control
3	Weaker influence

Carbon Baseline Study

We are one of only a small number of Local Authorities in the country to undertake such an extensive piece of work, measuring not only Scope 1 and 2 emissions but also Scope 3 emissions for its operational services.

The boundaries and definitions for the 3 scopes are outlined by the GHG Protocol and are as follows:

Category	Description
Scope 1	Direct Emissions from buildings, plant and vehicles owned or controlled by the Council e.g., natural gas used in boilers or fuel used by company owned vehicles
Scope 2	Indirect emissions associated with purchased electricity consumed by the Council and its districts e.g., grid supplied electricity
Scope 3	All other indirect emissions that occur in the Council's supply chain e.g., business travel, purchased goods and maintenance contracts

Figure 3: GHG Protocol Scope Definitions

The categorisation of our emissions into these 3 scopes illustrate the distribution of the emissions for which the Council is responsible across its spheres of influence (see Figure 3). This can then inform emission reduction measures by identifying where the emissions are coming from and how much control the Council has over them. This will allow the Council to efficiently allocate capital to reduce these emissions.

The total emissions reported during the baseline period was 84,551tCO₂e, of which, 11,201 tCO₂e (13%) are Scope 1 & 2 emissions. The remaining 87% are Scope 3 emissions, meaning the majority of the emissions are due to outsourced services that are managed and delivered by the Council. A comparison of the magnitude of emissions in each Scope is shown in Figure 5.

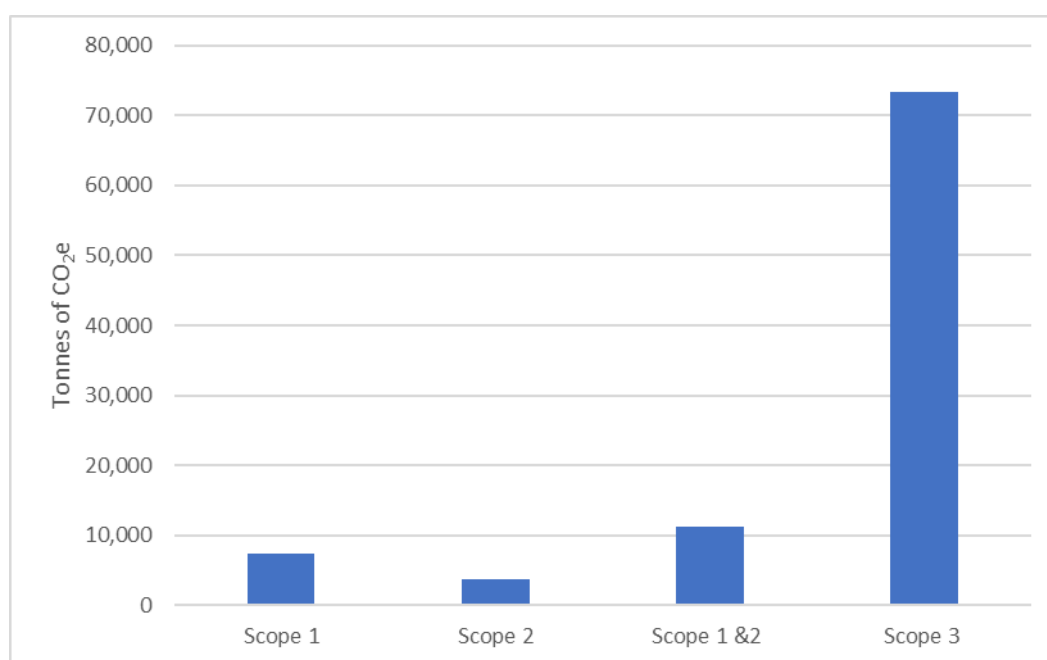


Figure 4: Scope 1, 2 and 3 Comparison

To put these emissions into perspective, the total carbon baseline is equivalent to the annual carbon emissions of 9,543 UK households or flying 2,528,816 air miles. The total weight of carbon is equivalent to 10,115 elephants or 4,335 double decker buses.

Westmorland & Furness Council

This baseline study has been conducted using 2019/20 data from the former Cumbria County Council, Barrow, South Lakeland and Eden Districts.

Total baseline emissions are 84,551 tCO₂e. Of these emissions, 9% are attributed to Scope 1 emissions, 4% to Scope 2 emissions and the remaining 87% are Scope 3 emissions. Scope 1 and 2 emissions total 11,201 tCO₂e and are largely the result of building emissions and Council-owned transportation. Figure 6 and Table 3 show the distribution of emissions across all 3 scopes.

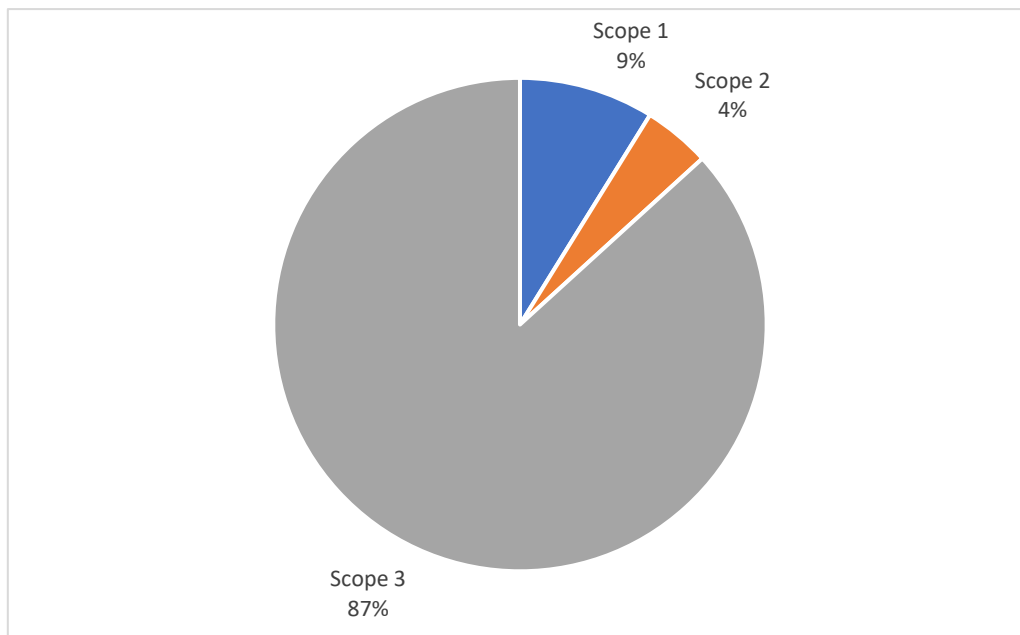


Figure 5: Westmorland and Furness Full Carbon Inventory

GHG Scope	tCO ₂ e	Proportion
Scope 1	7,474	9%
Scope 2	3,727	4%
Scope 3	73,350	87%
Total	84,551	100%

Table 3: Scope 1, 2 and 3 Breakdown

Scope 1 Emissions

Scope 1 emissions account for 9% of the total carbon inventory (Figure 7). Of these Scope 1 emissions, 59% are the result of gas use which is comprised of natural gas (97%) and gas oil use (3%) in buildings for heating. The remaining 41% are due to Council-owned transportation, whereby 59% is associated with fuel card use (e.g., in pool cars), 38% with bulk fuel and 3% from other vehicle usage.

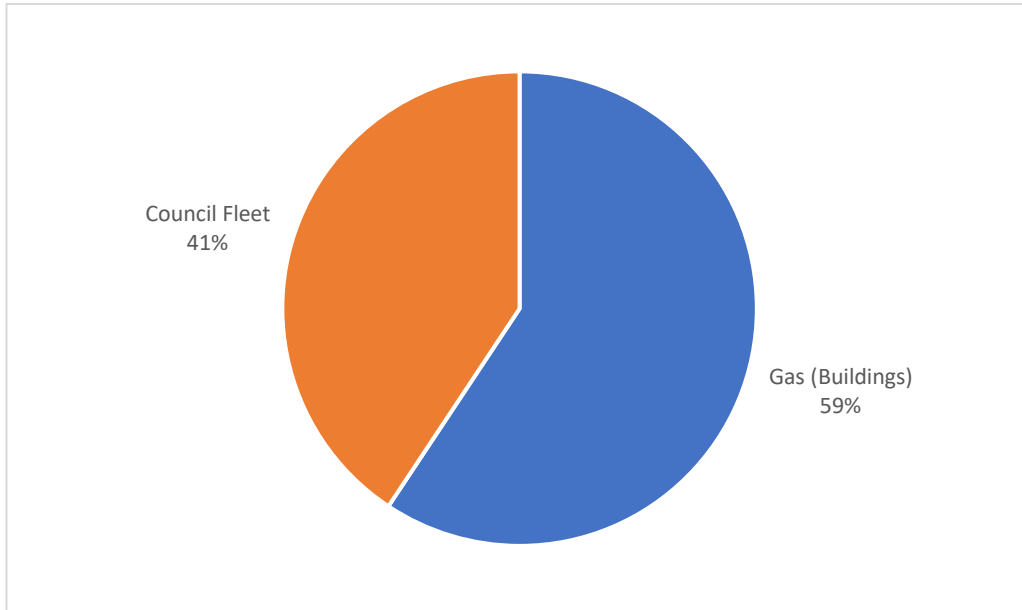


Figure 6: Scope 1 Emissions

Scope 2 Emissions

Scope 2 emissions, account for 4% of the total carbon inventory and are solely the result of purchased electricity used in buildings and for street lighting. Of these emissions 2,279 tCO₂e (61%) are produced by corporate buildings, while 444 tCO₂e (12%) are produced by Schools and 1,003 tCO₂e (27%) are produced by street lighting (Figure 8).

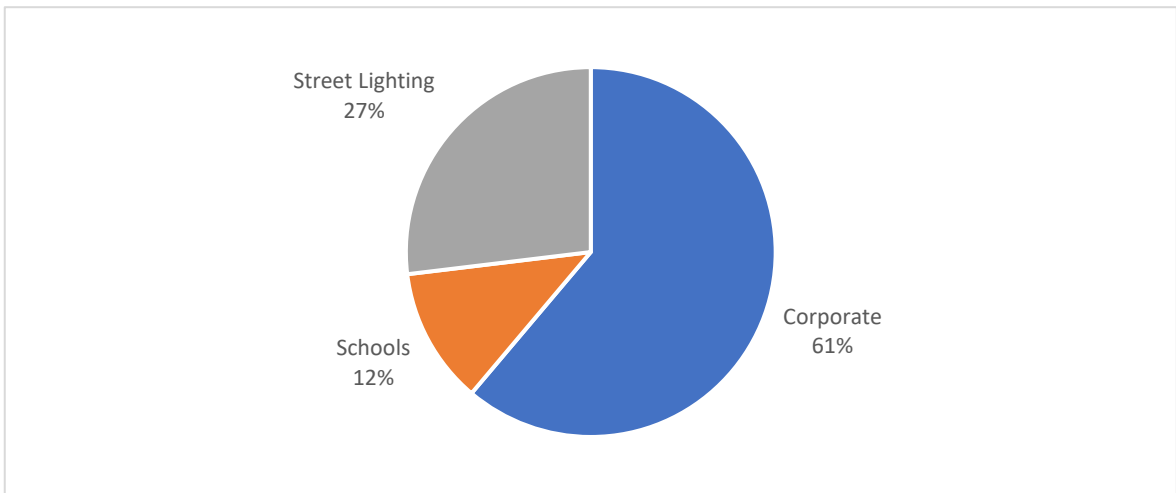


Figure 7: Scope 2 Emissions

Scope 3 Emissions

Of the total emissions for the Council, 73,350 tCO₂e (87%) are classified as Scope 3 emissions (Figure 9). These are the emissions resulting from outsourced services, meaning the Council has weaker control over how sustainably the goods and services are sourced. The use of transport (e.g., grey fleet, business travel, car hires) accounts for 16% of total Scope 3 emissions (10,911 tCO₂e). The majority of Scope 3 emissions, 59,121 tCO₂e (84%) are emissions associated with the supply chain including construction projects, care services and other purchased services.

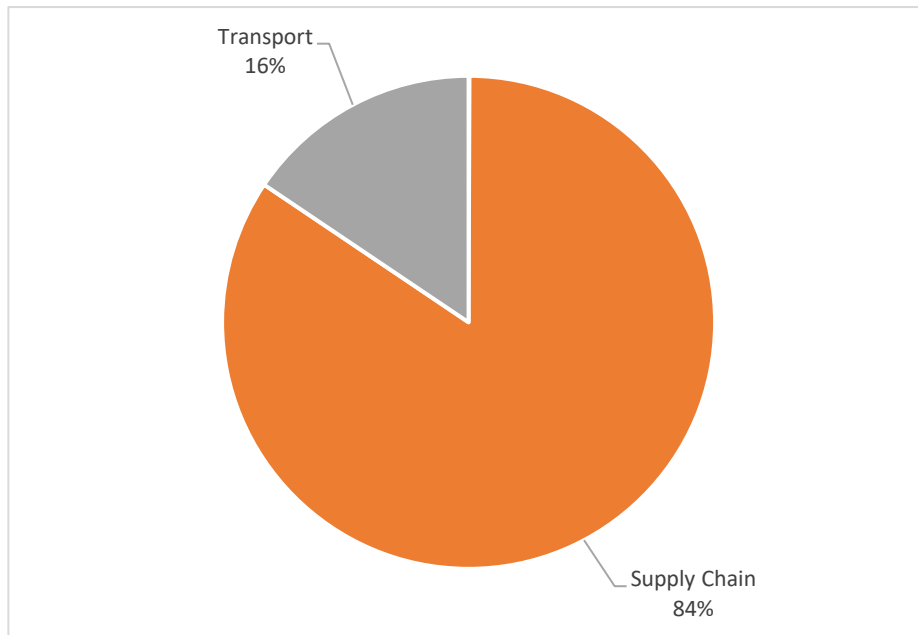


Figure 8: Scope 3 Emissions

Figure 10 depicts the sources of transport related Scope 3 emissions. This includes emissions due to business travel (rail, coach, ferry and air travel) car hire services and emissions sources that the Council has a level of influence over (pool car, grey fleet and staff commute).

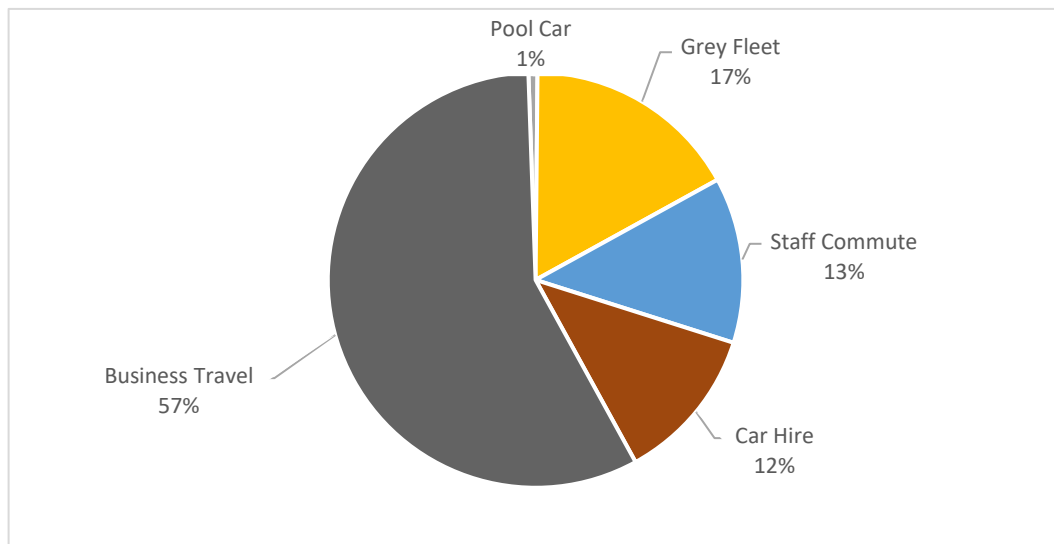


Figure 9: Scope 3 - Transport

Figure 11 depicts the supply chain emissions, which are the cause of the majority of Scope 3 emissions (84%). The bulk of the supply chain emissions are due to construction and renovation projects (46%) and the purchasing of care services (33%).

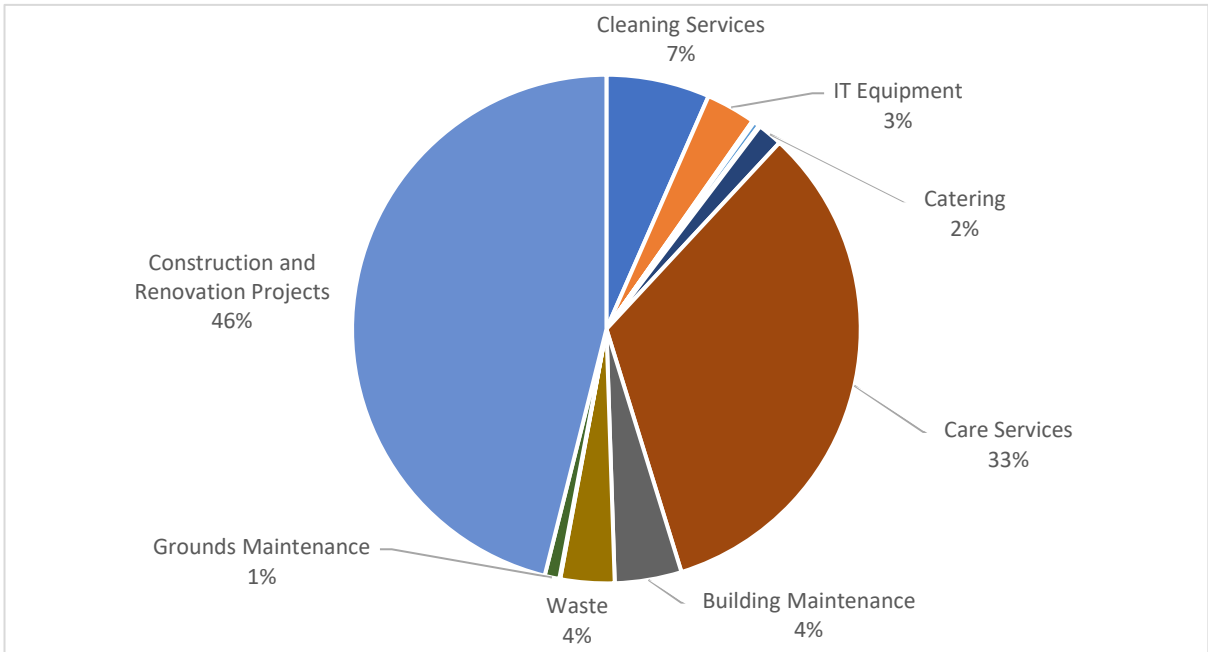


Figure 11: Scope 3 -Supply Chain

Figure 12 provides a combined overview of all scope 3 emissions. Construction and renovation projects are responsible for 42%, care services 30%, adult transport 11%, professional services 12% (cleaning, waste, catering etc.) and the remaining 5% from employee travel.

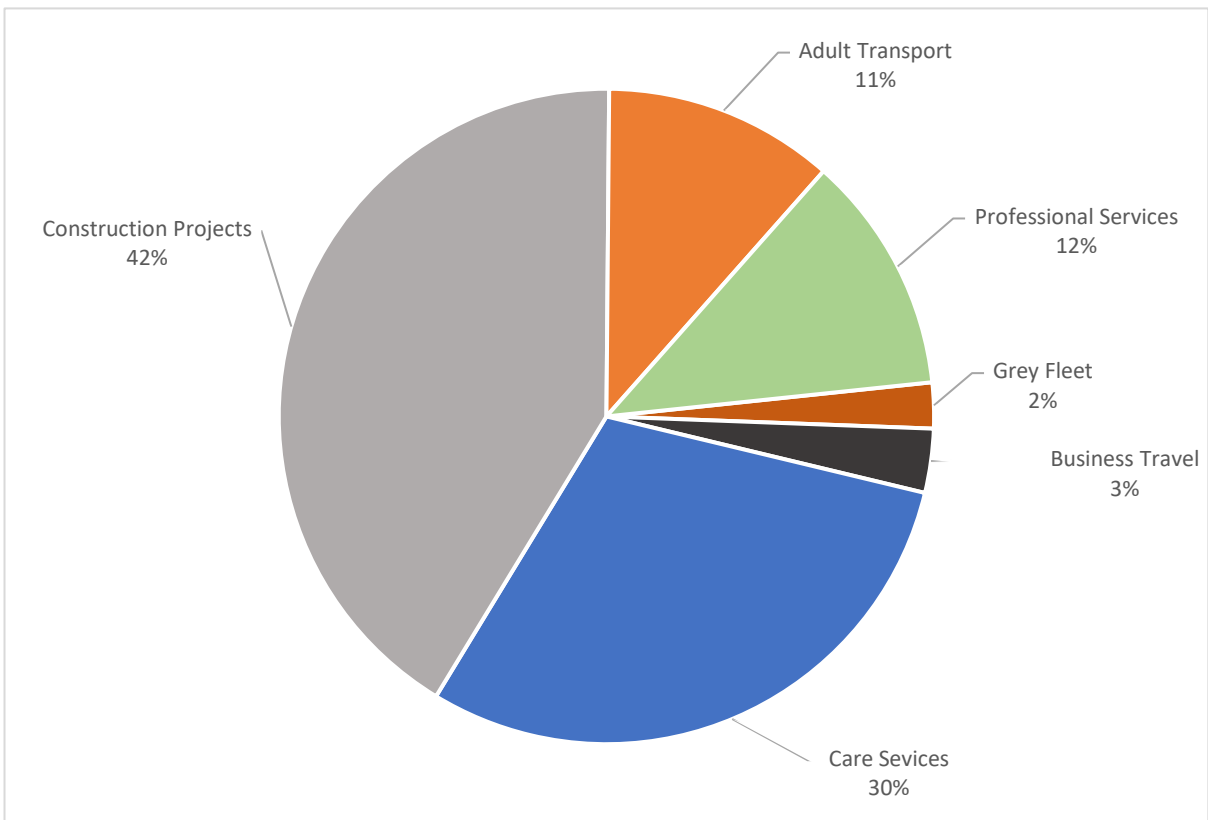


Figure 12: Total Scope 3 Emission Sources

To present a holistic overview of the Council's emissions and their causes, the full carbon emissions inventory for the period 2019-2020 is depicted in Figure 13.

Full Carbon Emissions Inventory

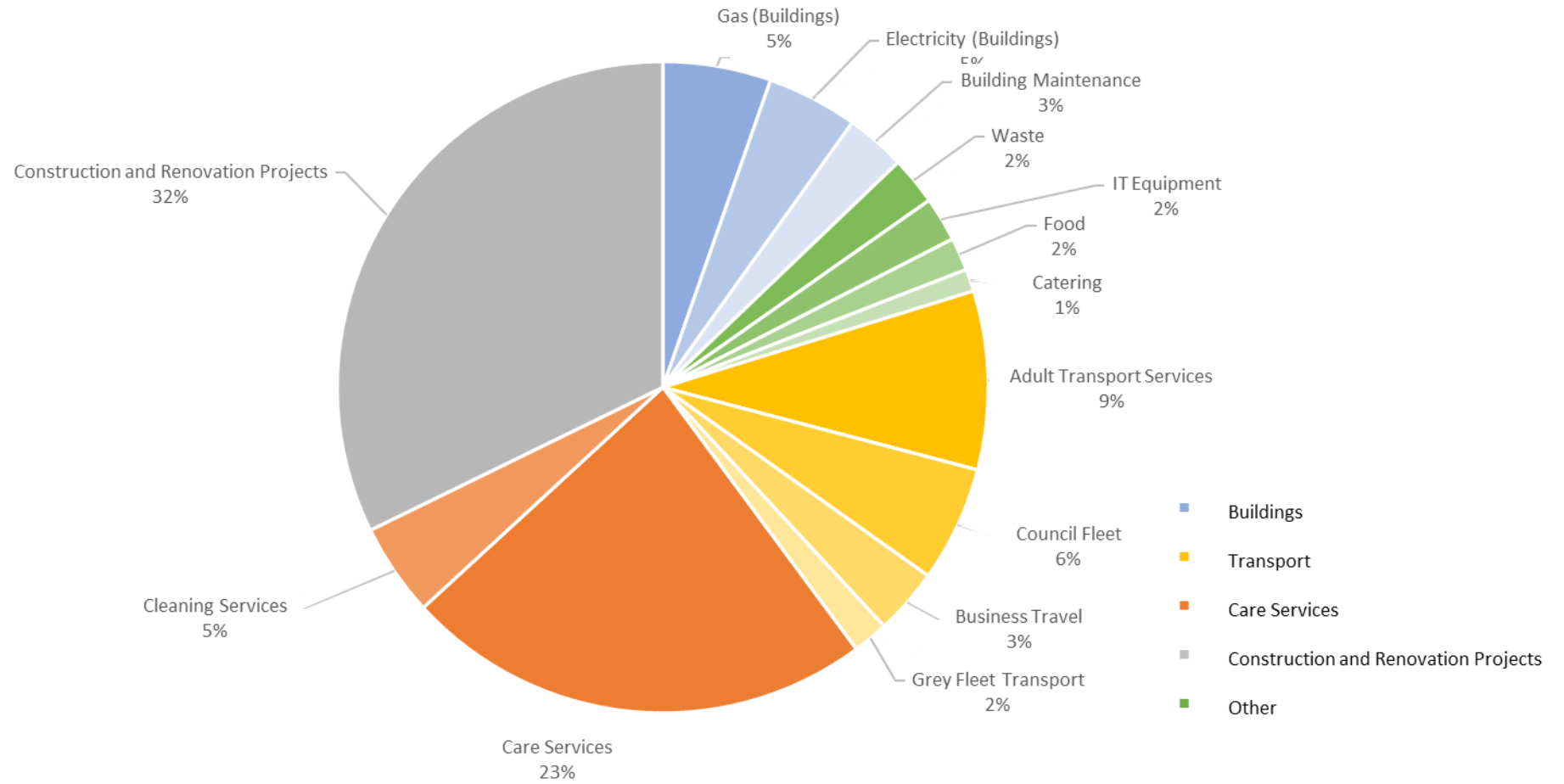


Figure 13: Westmorland and Furness Full Carbon Emissions Inventory

Delivery Workstreams

The Carbon Emission Baseline Study calculated all carbon emissions within the Council's operational boundaries and identified key areas that are producing the majority of these emissions. The study was used to inform carbon reduction pathways that help the Council to achieve our goal of Net-Zero Scope 1 and 2 emissions by 2037 and Net-Zero Scope 3 by 2050.

The approach taken towards reducing emissions follows the principles of the energy hierarchy:

- Prevent – the need for energy consumption by ensuring that the wastage is avoided or reduced.
- Reduce – the amount of energy consumed by the upgrade of the current building systems and equipment to equivalent and more efficient systems.
- Recover – 'used' energy and resources and re-use where there is an opportunity.
- Replace – the energy consumed with renewable energy supply options.

In response to the baseline, four delivery workstreams have been developed to address the core areas of emissions:

- Building Emissions Management – Scope 1 and 2 emissions associated with the operation and management of the properties across the Council's estate.
- Transport Emissions Management – Management of the Scope 1,2 and 3 emissions that are applicable to operation and management of both plant, equipment and vehicles directly owned and operated by WFC and a strategy for the emissions associated with staff commuting and the use of personal cars for business trips.
- Supply Chain Emissions Management – These are the emissions associated with the purchases and contracts required for the operations of the Council and delivery of the services expected by the local communities.
- Residual Emissions – After the measures identified have been implemented, there are residual emissions that cannot be mitigated by the reduction measures. These residual emissions set the magnitude of offsetting and in-setting required to achieve the Net-Zero target.

These workstreams are underway, with work packages being developed for each workstream.

Building Emission Reduction Methodology

The recommended building energy reduction measures were encompassed by 4 main categories inspired by the four principles of the energy hierarchy:

- Behaviour Change – ensuring Council employees minimise their energy use.
- Building Fabric – improvements such as roof and wall insulation, window glazing and draught proofing.
- Energy Reduction – upgrades, utilising energy efficient technologies to reduce energy consumption.
- Local Renewables – the installation of solar PV on buildings with adequate roof space and conditions for solar power.

The sequence in which the energy reduction measures should be implemented has been decided based in accordance with the energy hierarchy and the time taken for it to be completed, though it should be noted that the energy reduction measures can be undertaken out of sequence, if required.

Energy awareness programmes, monitoring and targeting programmes and energy surveys have been prioritised, as these measures reduce building energy consumption by a significant margin, in a short time frame, with minimal associated costs. The awareness programmes will ensure the energy consumption of the buildings is as low as possible to avoid unnecessary investment in the more expensive and sophisticated energy reduction measures. The energy surveys are detailed feasibility studies required to finalise the technical design changes required for the implementation of energy efficient technologies such as Air Source Heat Pumps (ASHPs).

Building fabric improvements should then be undertaken, to minimise needless energy consumption and heat loss. These building fabric improvements will also be necessary to facilitate the installation of the remaining energy reduction measures, such as the electrification of heat through ASHPs, heating and fan upgrades.

Modern active energy demand reduction technologies should then be implemented. These include the replacement of all lighting with LEDs, Building Management System (BMS) optimisation using machine learning and Artificial Intelligence (AI) systems to create smart buildings, installing ASHPs for heating and hot water, AHU fan upgrades and Air Conditioning (AC) occupancy controls.

Roof mounted solar PV should then be installed wherever possible, to satisfy a sizeable portion of the electricity energy demand from green energy generated on Council-owned buildings. The Council will, where possible, aim to use ultra-high efficiency monocrystalline solar PV panels that provide a yield of 25% as opposed to the 15% from polycrystalline panels. These panels can be used both in the roof-mounted solar arrays and the solar farm inseting measures discussed in the 'Residual Emissions' section. With the proposed measures, solar PV would be installed across 100 buildings amounting to a generative output of 4,991,960 kWh per annum.

Table 4 provides an overview of the measures taken to reduce emissions from buildings. A description of each emissions reduction measure (ERM), as well as their scope of implementation, has been included along with approximate financial payback periods, emissions savings and cost savings.

Table 5 is a timeline for the implementation of each category of ERM, ultimately completing by 2037.

Using this approach to reducing buildings emissions, all reduction programmes are predicted to be completed by 2037. Building related emissions (including street lighting) are expected to be reduced by 78.7% from 8,161 tCO₂e to 1,739 tCO₂e requiring an investment of around £19 million (£1.5 million

per annum), resulting in annual cost savings of around £3.5 million. These savings are calculated by applying 2023 electricity and gas prices to the consumption values before and after the ERMs are implemented. This is the total annual savings starting from 2037, when all the reduction measures have been completed. The building ERMs are expected to be completed by 2036, with BMS optimisation being an on-going process.

Figure 14 is the decarbonisation curve for the building emissions reduction measures. It shows the cumulative carbon savings of each of the measures at the completion date of 2037.

Category	Description	Payback
Behaviour Change	Energy Awareness Programme aiming to educate employees on how to manage their energy usage – only affects buildings with > £1,500 annual energy spend	Short
	Monitoring and Reporting Programme – only affects buildings with > £1,500 annual energy spend	Short
	Energy Surveys to assess which buildings are viable for electrification of heat (ASHP) – 33 buildings	N/A
Building Fabric	Window upgrade, double glazing and draught proofing – in buildings with > £5,000 annual energy spend	Long
	External door replacement – in buildings with > £5,000 annual energy spend	Medium
	Improve loft insulation – in buildings with > £5,000 annual energy spend	Short
	Improved cavity wall insulation and draught proofing – in buildings with > £5,000 annual energy spend	Short
Energy Reduction	Replace all non-LED lighting – in 80% of buildings	Medium
	Optimisation of existing BMS for offices using AI operated system to deliver machine learning optimisation – in top 5 buildings by energy spend	Short
	Replace all gas-fired boilers with ASHPs – in 70% of gas consuming buildings	Short
	AHU fan upgrade to EC units – in top 6 buildings by energy spend	Short
	AC Occupancy Controls matching usage to occupancy – in top 8 buildings by energy spend	Medium
Renewables	Local Solar PV –Solar PV installed across 100 sites, 200 m ² each	Medium

Table 4: Building Emissions Reduction Measures

Building Emission Management Strategy Timeline

			2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	
Building Emission Management	Behaviour Change																
		Energy Awareness															
		Monitoring and Targeting															
		Energy Survey															
	Building Fabric																
		Windows															
		Doors															
		Roof insulation															
		Wall Insulation															
	Energy Reduction																
		LED Lighting															
		ASHP replacing boilers															
		AHU fan and control															
		AC controls															
		BMS Optimisation (Smart Buildings)															
	Local Renewables																
		Local PV															

Table 5: Timeline of Building Emission Reduction Measures

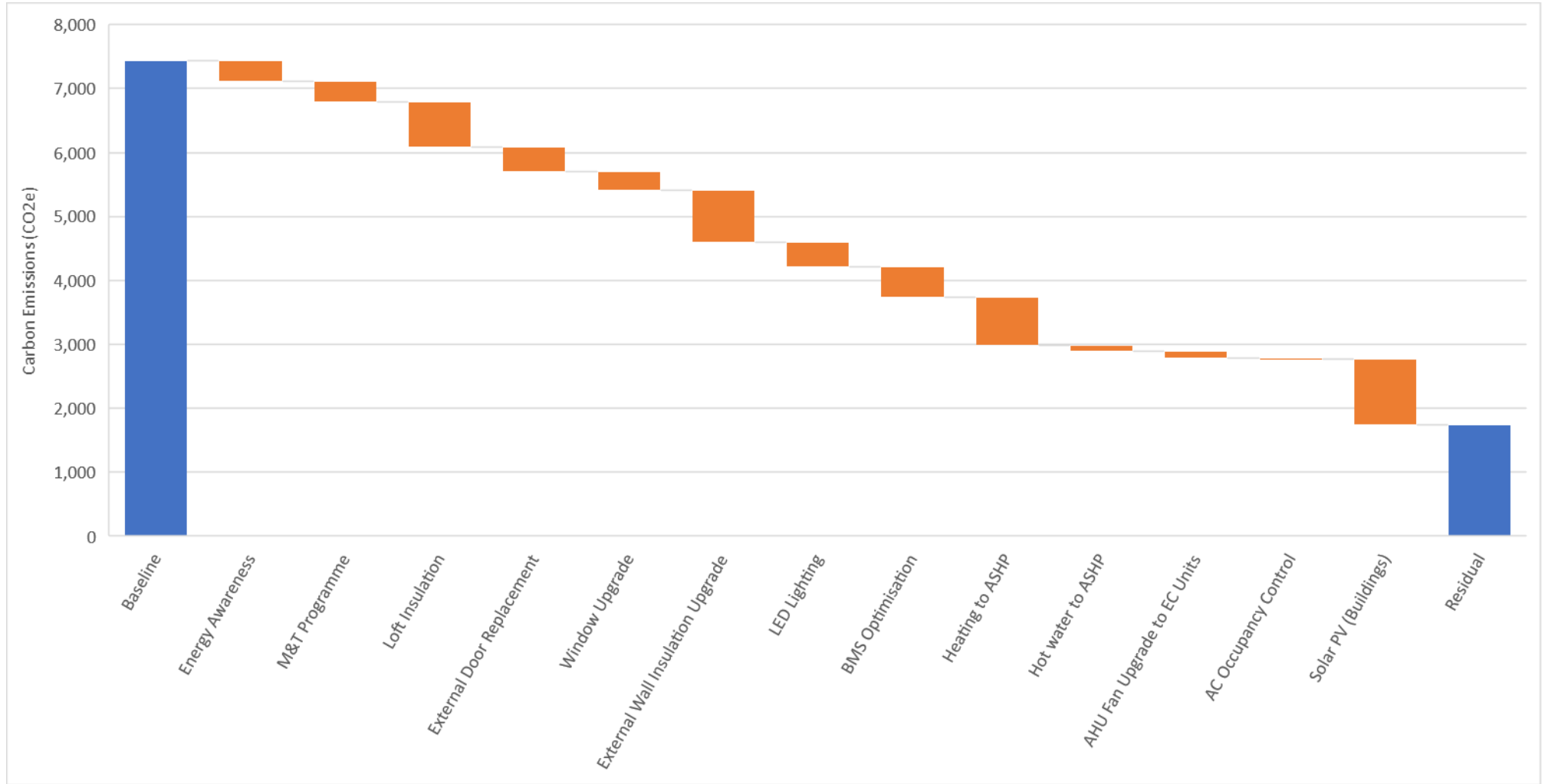


Figure 14: Buildings Decarbonisation Curve

Transport Emissions Reduction Pathways

The UK Government predicts total grid decarbonisation by 2035¹⁰. If all Council related transport decarbonisation could be carried out by electric vehicles (EVs) by that time, the Council would have no emissions due to transport. However, there are a number of barriers preventing complete Net-Zero transportation for the Council. The emissions considered in the reduction pathways are those due to Council-owned vehicles, grey fleet usage, staff commuting and business travel. It should be noted that all fleet related measures, will be further developed in a Fleet Management Strategy, which will further define the options available to the Council and the costs associated with these.

In order to eliminate emissions relating Council owned fleet, which accounts for approximately 41.5% of transport related emissions, it is recommended that these vehicles are replaced with their electric counterparts.

The transport emission reduction pathways measures were selected, categorised and implemented using the same philosophy as the building energy reduction measures.

- Management and Process Changes – aimed to reduce total mileage of Council fleet vehicles and business travel.
- Infrastructure Upgrades – to facilitate the transition from using diesel and petrol to Hydrotreated Vegetable Oil (HVO) and EV's.
- Low Emission Technologies – involving the replacement of Council owned vehicles to low emission vehicles.

The first step will be to minimise Council vehicle, grey fleet, staff and business travel mileage to reduce total fuel consumption before the emissions from essential travel are mitigated through low-emission vehicles. ICT improvements to enable video conferencing and virtual meetings are recommended to reduce the need to travel between offices for business. Providing work laptops and IT peripherals to allow working-from-home is also recommended to minimise staff travel. The installation of Council fleet telematics should also be implemented to monitor Council fleet travel and identify carbon hot spots within the fleet where usage may be reduced.

At the time of writing, no EV counterparts for the larger, diesel Council vehicles are readily available. The emissions from these vehicles can therefore be reduced by switching to HVO. This is a chemically similar, sustainably produced alternative to diesel that can be used by existing diesel engines.

The remaining smaller Council fleet vehicles can be replaced with EVs to progress towards Net-Zero transport emissions by 2035. Some EV charging points currently exist across the Councils estate for public use rather than staff use. Therefore, the installation of the Council's own EV infrastructure has been considered. The Council owns approximately 512 vehicles with EV alternatives available as replacements. Using a 10:1 ratio of charging points to EVs, 51 charging points could be strategically installed across the Council estate. It will be necessary to time the replacement of fossil fuel vehicles to EVs, alongside the installation of charging infrastructure across the Councils estate.

Although immediately replacing the entire fleet would significantly reduce Council fleet emissions, this would demand a large amount of CAPEX and the return on investment would initially be low but would become more appealing as 2035 approaches. As an alternative strategy, the replacement of vehicles should be prioritised as they reach end of life, with the replacement of around 10% of Council vehicles

¹⁰ <https://www.gov.uk/government/news/plans-unveiled-to-decarbonise-uk-power-system-by-2035>

with EVs each year over a 10-year period is recommended but is also subject to the development of a fleet decarbonisation strategy which may refine the approach and propose an equivalent.

Using this approach to reducing transport emissions, the completion of all reduction programmes is predicted to be complete by 2035. Transport related emissions are expected to be reduced by 64.3% from 7,313 tCO₂e to 3,728 tCO₂e requiring an investment of around £7.5 million (£0.580 million per annum). This results in annual cost savings of around £3.44 million.

The residual transport related emissions are the result of HVO fuel use and business travel through non-renewable means. In the event that there is a feasible alternative for larger Council vehicles by 2034, the remaining emissions resulting from business travel would be 3,620 tCO₂e. To reach Net-Zero transport emissions, all business travel must be done through green energy contracts.

Table 6 provides an overview of the ERMs taken to reduce transport emissions. A description of each measure, as well as their scope of implementation has been included, along with estimated financial payback periods, emission savings and cost savings.

Table 7 is a timeline for the implementation of the transport ERMs, ultimately completing by 2034.

Figure 15 is the decarbonisation curve for the transport ERMs. It shows the cumulative carbon savings of each of the measures at the completion date of 2037.

Category	Description	Payback
Low Emissions Technologies	Cycling and Walking Programme - Cycling infrastructure upgrades at council offices and depots	Short
Infrastructure	HVO Vehicles Transition for all Diesel Vehicles - Prioritise >7.5 tonne vehicles use existing storage and assumed 4 additional HVO tanks	Medium
	EV Charging points – assuming 10:1 EV to charging point ratio, install 51 new charging points	Medium
Management	Telematics and Route Optimisation for all council vehicles to reduce business mileage	Short
	Eco-driving E-learning – reduce engine idling, harsh acceleration and EV familiarity	Short
	ICT Improvements – more workstations in the offices, faster internet and work phones reducing the need to travel	Medium
	Work-from-Home – provision of IT equipment, Employee laptops and monitors	Short

Table 6: Transport Emissions Reduction Measures Overview

Transport Emission Management Strategy Timeline

			2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037		
69	Transport Emission Management	Management and Process Change																
			Council Fleet Telematics															
			Eco-driving e-learning															
			ICT Improvements															
	Infrastructure																	
		Introduce EV																
		HVO Vehicles Support																
	Low Emission Technologies																	
		Cycling and Walking Programme																

Table 7: Transport Emissions Reduction Measures Timeline

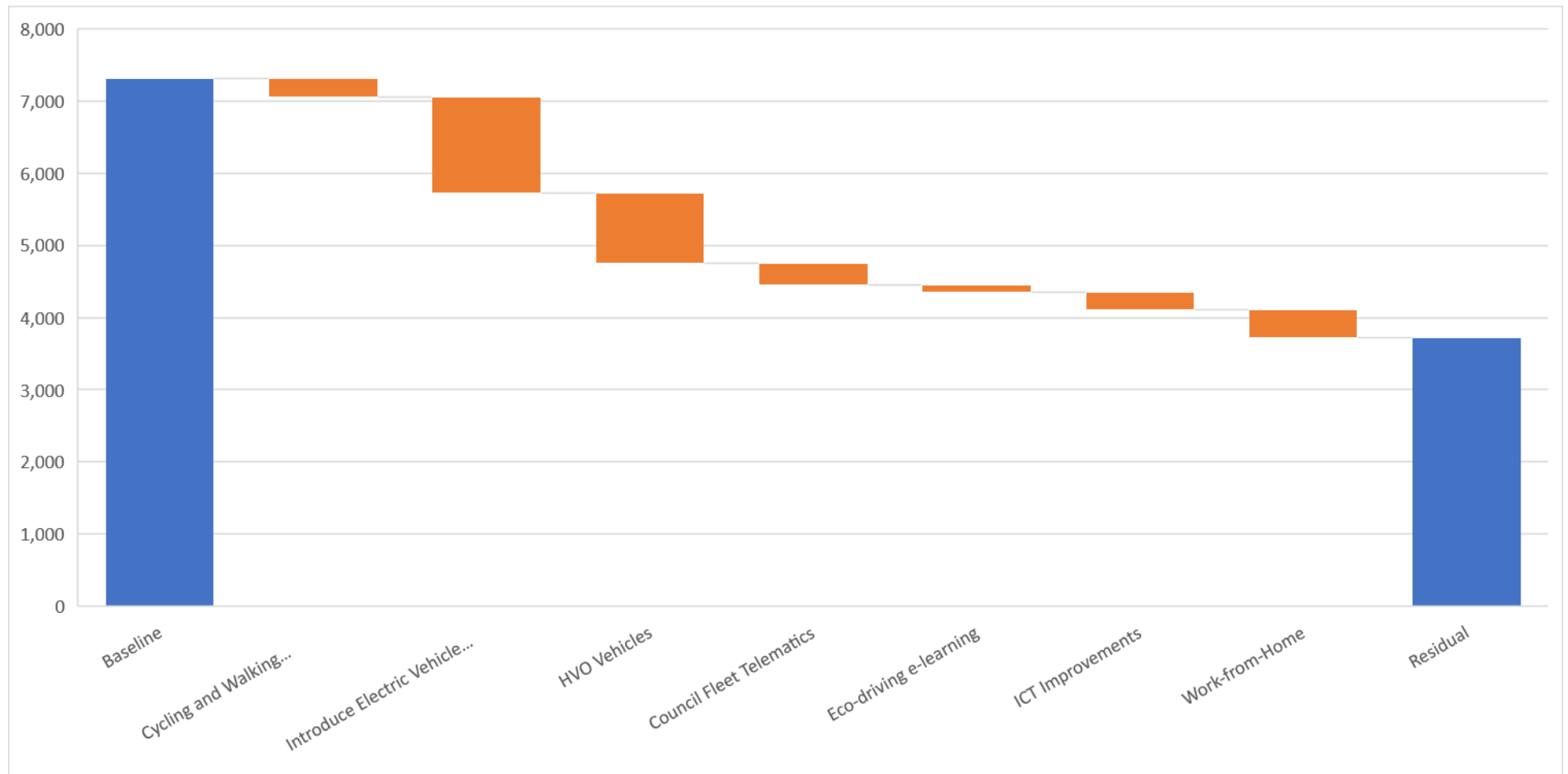


Figure 105: Transport Decarbonisation Curve

Supply Chain Emissions Management

The main focus of this strategy is the management of carbon emissions related to the Councils supply chain including purchases and contracts required for the operation and delivery of Council services. Supply chain related emissions account for 59,121 tCO₂e (84%) of the Scope 3 baseline and are the most challenging to mitigate.

The Scope 3 supply chain emissions have been ordered into 3 categories in relation to the Council's ability to influence their impact, from Easy to Difficult and summarised below:

EASY: the emissions that are directly associated with the day-to-day staff activities, this includes business travel, the use of personal and non-Council owned vehicles and water and sewage related emissions

MEDIUM: Outsourced services where the organisation is providing labour and consumable goods to manage and deliver a service on behalf of WFC. This includes:

- Schools and Adult service transport
- Operation of care homes, schools and day centres
- Roads and grounds maintenance
- Project delivery through the Capital Programme

DIFFICULT: The supply contracts associated with the provision of the school, care home and corporate food stuffs and office consumable goods.

The Council will work with the supply chain to identify carbon emissions associated with the products and services that they provide and help them to implement improvements to reduce their emission. The strategy for the delivery improvements in this area is summarised below and uses the principles of reward and disincentive regarding both financial and non-financial means.

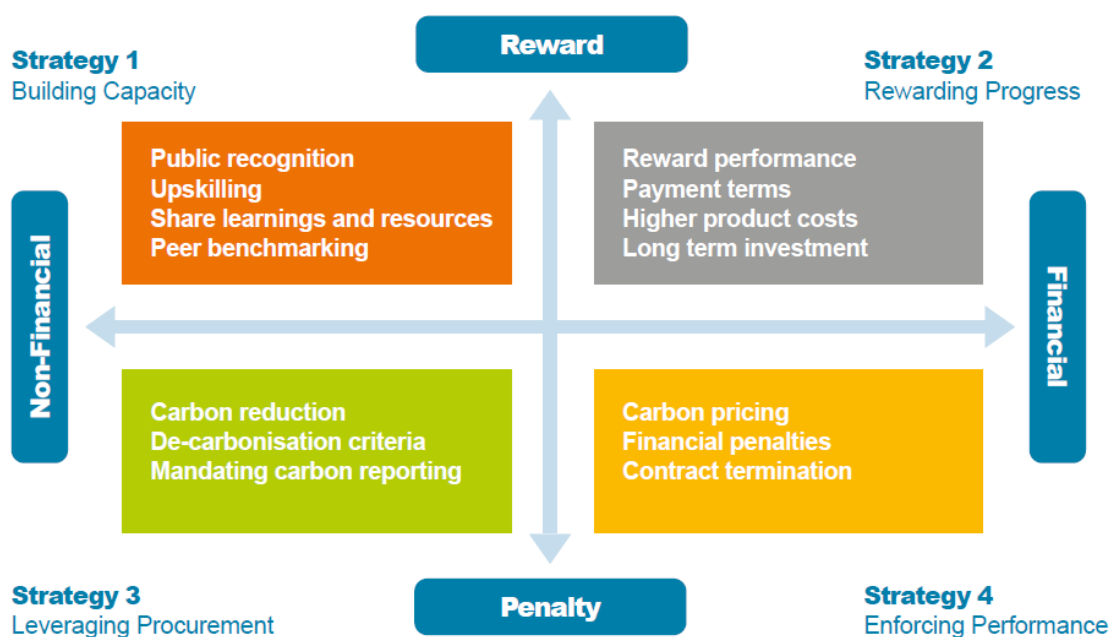


Figure 16: Supply Chain Emissions Management Strategies

With the increasing adoption of low carbon technologies and pressure on supply chain providers to reduce their carbon emissions, the Councils supply chain will experience decarbonisation over time, regardless of any action taken to reduce supply chain emissions. We can forecast this passive decarbonisation by analysing the trend in carbon factors in recent years.

Carbon factors published by DEFRA¹¹ show a decreasing trend for most carbon emitting activities within supply chains. The carbon factors for a number of supply chain activities published between 2007 and 2011 have been analysed and their trajectory has been extrapolated to predict carbon factors for the period between 2024 and 2050. This analysis revealed an exponentially decaying rate of decarbonisation for the activities in the Council’s supply chain.

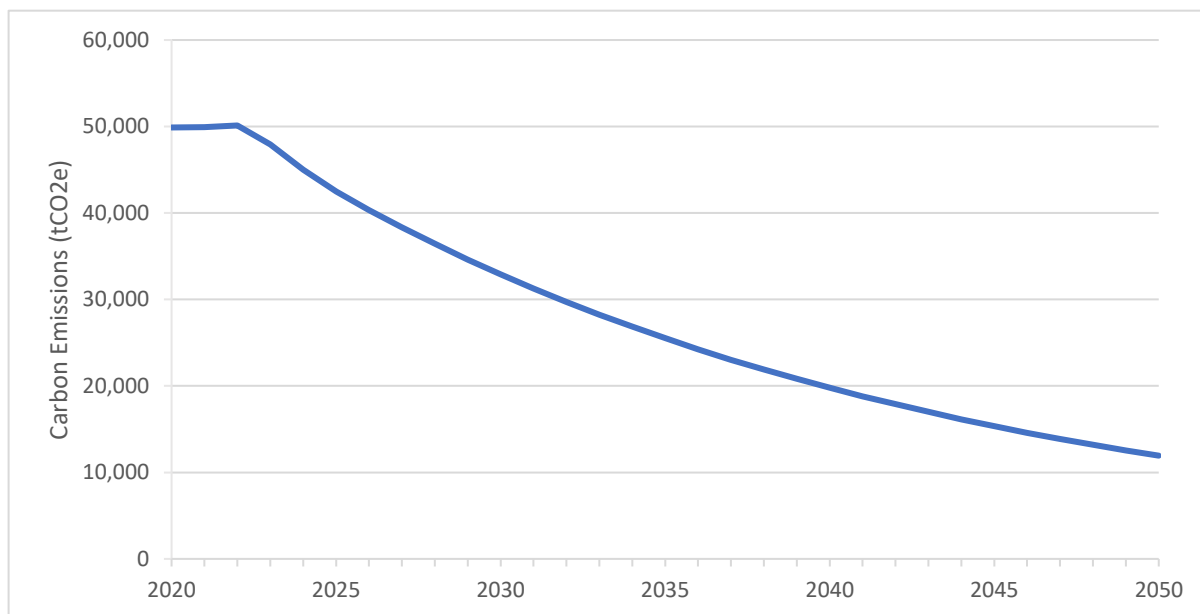


Figure 17: WFC Supply Chain Decarbonisation Projection – ‘Do-Nothing’ Scenario

Figure 17 shows the ‘Do-Nothing’ scenario, in which the expected supply chain related emissions up to the year 2050 are displayed, assuming the intensity of the Councils operations remain constant and that the trend in decarbonisation between 2007 and 2011 continues.

If the above forecast trajectory is realised, achieving Net-Zero supply chain emissions by 2050 is entirely feasible. Under this ‘Do-Nothing’ scenario only 11,940 tCO₂e of scope 3 emissions need to be mitigated. This can be achieved by securing green contracts with a few key suppliers to lower these emissions further and additional investment in insetting projects to negate any residual emissions. If the Council chose not to ‘green’ its supply chain and invest in insetting, to achieve net zero by 2050 would cost the Council around £208,950 in carbon credits per year to eliminate the remaining 11,940 tCO₂e.

The total cost in offsets has been calculated using the average price for the most well-known certification programmes for carbon credits; the gold standard and the Verified Carbon Standard¹². Carbon credits with these standards are priced at around £10-25 per tCO₂e, although there are many

¹¹

https://assets.publishing.service.gov.uk/media/5a7f3a06ed915d74e622928d/Table_13_Indirect_emissions_from_supply_chain_2007-2011.xls

¹² [https://www.go-positive.co.uk/page-](https://www.go-positive.co.uk/page-18196#:~:text=Carbon%20Credits%3A%20%C2%A310%2D25,help%20save%20carbon%20somewhere%20else.)

18196#:~:text=Carbon%20Credits%3A%20%C2%A310%2D25,help%20save%20carbon%20somewhere%20else.

examples of cheaper and more expensive carbon credits. The average of £17.50 per carbon credit has been used to estimate the cost of offsetting residual Scope 3 emissions.

Residual Emissions

Implementing the building ERMs outlined in this report are intended to deliver significant reductions in energy consumption, which are intended to help to significantly reduce the Council's carbon emissions. It is intended that the Council's carbon footprint should be minimised as far as possible through the measures, however, there will still be some residual emissions as a result of energy and fuel consumption.

The proposed building and transport ERMs are intended to electrify the Council's building energy demand and the majority of its fuel demands, leaving residual Scope 1 & 2 emissions of 5,658 tCO₂e due to electricity usage (5,275 tCO₂e from buildings, EVs and street lighting), natural gas and heating oil use in older buildings (275tCO₂e) and HVO fuel consumption (108 tCO₂e). The UK Government has made a commitment to completely decarbonise the national electricity grid by 2035. The Council aims to achieve Net-Zero Scope 1 & 2 emissions by 2037. This means by 2037, the Council's electricity demands can be met using green energy from the national grid, eliminating 5,275 tCO₂e from the residual emissions. This leaves the 383 tCO₂e produced by gas in buildings and HVO fuel use that must be in-set.

Emissions insetting is the reduction of the organisation's emissions by investment in green energy projects such as the proposed large-scale solar projects in the Cumbria region. A review of the use of large-scale solar PV generation in the Cumbria region has been undertaken. There is currently 2 MW of solar PV under development in Westmorland and Furness with a further 2 MW at planning stage. This amount of PV generation should be sufficient to offset the residual 383 tCO₂e.

In the event that the grid does not decarbonise by 2035, or is only partially decarbonised, the Council may need to invest in more extensive carbon in-setting measures to achieve Net-Zero Scope 1 & 2 (Table 8).

The decarbonisation curves in Figures 14 and 15, show residual emissions. These are calculated using baseline consumption data and take into consideration reductions from the ERMs to be completed by 2037. These residual emissions amount to 5,658 tCO₂e, a value calculated using 2023 carbon factors. This means 5,658 tCO₂e is calculated as the maximum residual carbon emissions that the Council may need to eliminate by 2037 in order to reach Net-Zero Scope 1 & 2 emissions.

There are two principal methods to address this residual mass of CO₂e; either through offsetting or insetting.

These projects are calculated to leave 4,932 tCO₂e residual emissions. Table 8 shows the recommended insetting measures that are required to eliminate these remaining Scope 1 & 2 emissions, should the grid not be decarbonised by 2037, or be only partially decarbonised.

Insetting Measure	Avoided Emissions (tCO ₂ e)	Estimated Cost (per tCO ₂ e)
Solar PV – 10.18 MW	2,541	£7,620
Tree Planting – 60 hectares	2,391	£1,350

Table 8: Additional insetting measures

Energy Reduction Measures – Abatement Costs

The UK Government has published guidance in the form of the valuation of greenhouse gas emissions: for policy appraisal and evaluation (a supplement to the Green Book), which seeks to guide decision makers on the cost of carbon emissions reduction interventions. The guidance presents a series of carbon values ‘per tonne of CO₂ reduced’ which indicates a tonne of carbon costs between £126 and £378 to remove in 2023. The figures are calculated as marginal abatement cost i.e., the marginal cost of removing one tonne of carbon from the baseline total. Whilst useful as a guide, the marginal abatement cost must be treated with caution when designing decarbonisation strategies which aim to reduce fully to net zero. Marginal abatement costs (and curves) are designed to identify measures which ‘would be implemented first’ usually at the margins of a strategy where a lower percentage reduction is required (i.e., 10 or 20%). The actual abatement costs for reduction measures are greater than the marginal abatement cost because the best value reduction measures (e.g., housekeeping measures), must be delivered within the strategy alongside other more expensive measures (e.g., heat pumps and renewables).

This strategy uses industry baselined costs for each energy reduction measure to inform the basic capital cost for each option. As each work package develops, the energy reduction measures (e.g., a programme of LED replacements), will also demonstrate value for money with a more detailed abatement cost appraisal including capital costs alongside savings or income to inform the final investment decisions.

Westmorland & Furness Council – Net-Zero Pathway

The waterfall diagram (Figure 18) and programme (Table 9 and Figure 19) below provide an overall summary of the ERMs and the magnitude of the reductions that should be needed to deliver the emissions reductions required to achieve Net-Zero Scope 1 and 2 by 2037. The measures require a total capital expenditure of around £26 million in total or around £2. million annually. At the completion date of the ERMs (2037), the estimated cost savings are estimated to be around £8 million per annum.

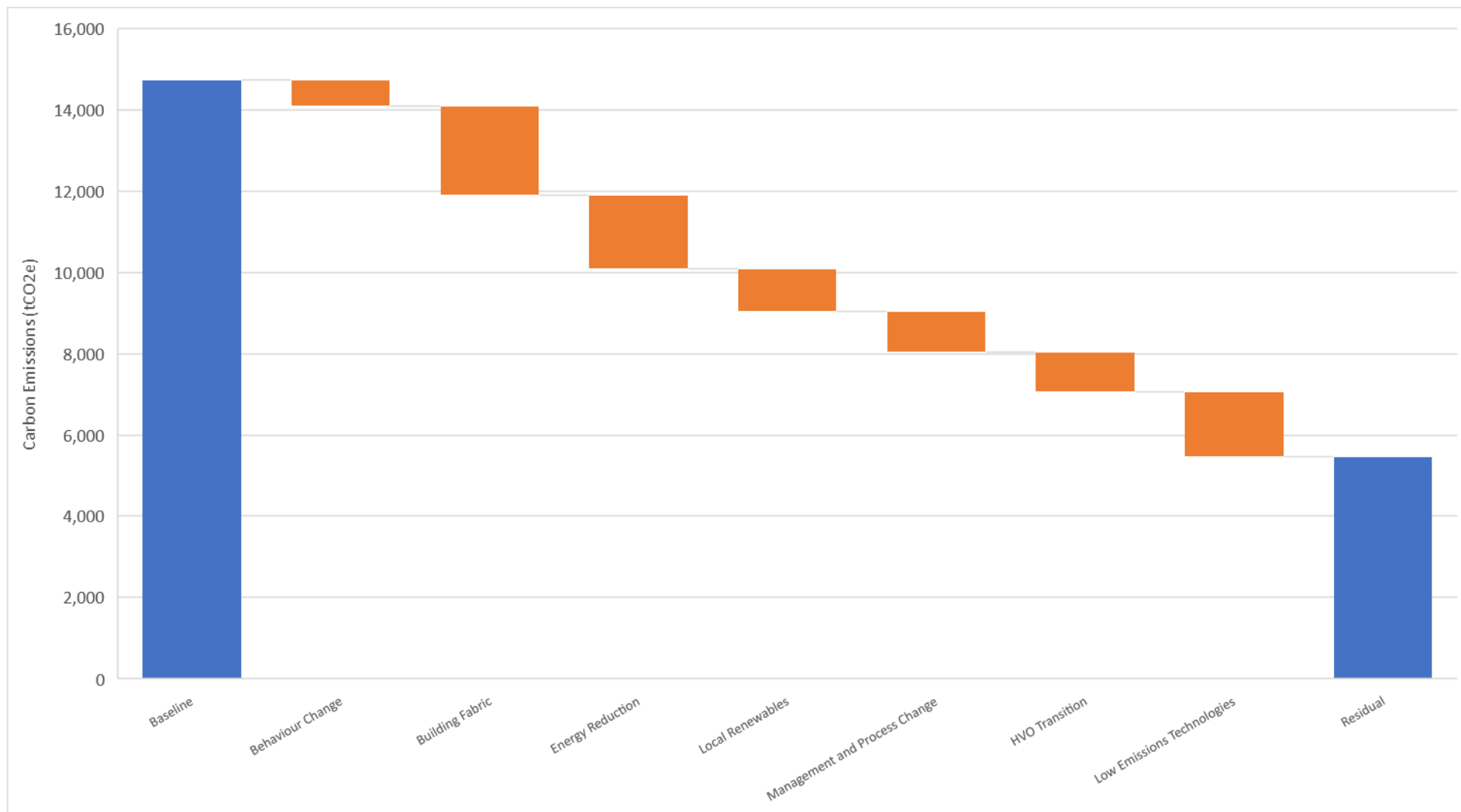


Figure 18: Westmorland and Furness Decarbonisation Curve

		2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037
Building Emission Management	Behaviour Change														
	Building Fabric														
	Energy Reduction														
	Local Renewables														
Transport Emission Management	Management and Process Change														
	HVO Transition and Infrastructure														
	Low Emission Technologies														
Residual Emission	Large Scale Renewable Projects														
	Additional Insetting														

Table 9: Timeline of Emissions Reduction Actions

Estimated cumulative emissions savings, tCO₂e delivered by each of the reduction measures

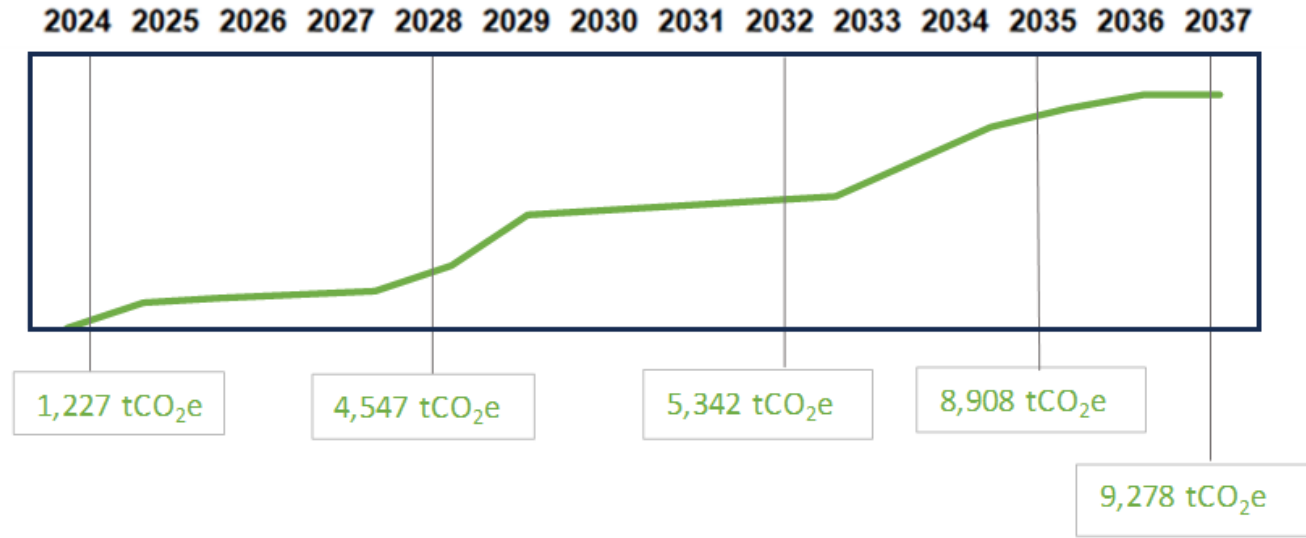


Figure 19: Emission reductions over the course of the delivery programme (2024 - 2037)

Conclusions

The Council is well placed to play a significant role in developing a position of Net Zero emissions and has set the target of net zero carbon emissions by 2037 for Scope 1 and 2.

A strategy to reach Net Zero is reflective of international, national and regional policy which set challenging targets for the delivery of Net Zero over the next two decades.

Based upon the 2019-20 baseline data, the Council produces 84,551 tCO₂ annually of GHG Scope 1, 2 and 3 emissions. Council Of these emissions, 9% fell under Scope 1 emissions and 4% under Scope 2, meaning a total of 11,201 tCO₂e Scope 1 and 2 emissions are within the Councils ability to influence. The remaining 87% were Scope 3 emissions that the Council has significantly less control over. Table 16 shows the timelines of carbon savings, cost savings and total capital expenditure required to deliver the proposed building and transport measures between 2023 and 2037.

Scope 1 and 2 emissions are directly within the Council's control and are typically targeted by organisations taking steps to move towards a Net Zero position. Scope 1 and 2 activities include building energy use and transport which are primary sources of emissions. The CO₂e emissions from natural gas consumption for building heating accounts for 59.3% of the GHG Scope 1 emissions. With no renewable alternative for natural gas available, without any large-scale conversion of the building space heating and domestic hot water generation from natural gas to electric, there will be minimal reduction in these emissions in line with the Council's goals. Heat loss mitigation and the electrification of heat should play a major role in minimising Scope 1 building related carbon emissions.

Scope 1 carbon emissions due to transport (41.7%) are largely the result of Council vehicle usage. With the UK Government's commitment to a Net Zero electricity grid by 2035, the solution to dealing with transport related emissions is to replace all current Council-owned vehicles with electric vehicles (EVs). This is feasible for most of the Council's vehicles, however, there are no EV alternatives for some of the larger vehicles. To minimise the emissions from these larger vehicles which are diesel fuelled, the Council could switch to using HVO. HVO is a chemically similar alternative fuel source that produces 90% less carbon emissions than diesel.

These measures result in 383 tCO₂e of residual Scope 1 emissions due to HVO and building heating through gas boilers. There is currently 4 MW of solar energy generation under development in the Westmorland region that can be used to offset these residual emissions. This is currently sufficient to reach complete Net-Zero Scope 1 emissions.

Scope 2 emissions are solely the result of electricity consumption over the baseline period. By 2035, in line with the UK Government's commitment to total UK electricity grid decarbonisation, the grid will be powered by renewable energy which will mean WFC should achieve zero Scope 2 emissions by their target date of 2037.

If the electricity grid does not fully decarbonise by 2037, the Council will have to invest in additional inseting measures to achieve Net Zero Scope 1 and 2 emissions. The extent of these measures has been determined based on the maximum potential carbon emissions that the Council will be responsible for once the proposed ERMs have been implemented. In this case, 10.18 MW of additional solar energy generation will be required, along with 60 hectares of tree planting to offset these residual emissions.

The remaining 87% of the carbon baseline are Scope 3 emissions which the Council has little influence over. These are largely due to capital projects and the maintenance of highways and buildings (41%),

care services (30%) and adult transport services (12%). A supply chain management strategy has been provided in this report but will be further developed with the procurement team.

The Council's objective is to reach Net Zero Scope 1 and 2 emissions by 2037 and Net Zero Scope 3 emissions by 2050 or sooner. Buildings and transport emissions management workstreams have been designed to achieve the Scope 1 and 2 Net Zero target, and supply chain and residual emissions delivery workstreams have been provided to achieve Net Zero Scope 3.

Building Emissions Management – 73%

Building related emissions account for 75% of the Council's Scope 1 and 2 emissions. These emissions are the result of gas and electricity consumption due to heating, lighting and plant equipment usage. The steps taken to mitigate these emissions follow the four stages of the energy hierarchy:

- **Behaviour Change:** No/low-cost energy reduction measures are first put into place. These include Energy Awareness programmes, to minimise energy use by building occupants, as well as Monitoring and Reporting programmes.
- **Building Fabric:** To maximise the energy efficiency of buildings and make effective use of any energy used for heating, the building fabric of frequently used buildings is improved. This involves upgrading windows, draught proofing, improving loft and wall insulation and external door replacement.
- **Energy Reduction:** Energy efficient technologies are put in place. This includes the replacement of gas-fired boilers with ASHPs to electrify building heating, replacement of existing lighting with LED, AHU fan upgrades, BMS optimisation with AI Systems to create Smart Buildings and AC occupancy controls to match usage to building occupancy.
- **Renewables:** Once the energy consumption of buildings is reduced as much as possible, the residual energy must be supplied by renewables to achieve net-zero buildings. Flat, unshaded building roof space can be used to install integrated solar PV to supply the building with this electricity.

Transport Emissions Management- 27%

With the UK electricity grid decarbonisation expected in 2035, a simple and cost-effective route to Net-Zero transport by 2037 is to replace Council owned vehicles with EVs by this date. The introduction of EVs are currently planned to be part of a long-term transport fleet and plant replacement programme, where Council vehicles are replaced at end of life. It is expected that the most viable vehicles, which currently excludes the Council's largest vehicles, could be replaced at a rate of approximately 10% per year, which would allow a majority of vehicles to be replaced by 2037. In the intermittent period between now and 2037, other low-carbon options are available. The fleet replacement programme will be further refined in a Fleet Management Strategy.

The majority of the Council's transport emissions are the result of diesel vehicle use. These emissions can be significantly reduced by switching from diesel to HVO, an alternative fuel source that results in 90% less carbon emissions at the expense of a 10% price increase. As HVO is chemically similar to diesel, the transition to HVO also requires minimal infrastructure investment. At the time of writing, no feasible alternatives exist for some of the larger Council vehicles, making HVO a key factor in minimising these emissions before alternatives enter the market.

Supply Chain Emission Management- 87%

Supply chain emissions account for 59,121 tCO₂e of the total carbon baseline and are primarily due to capital projects, highway maintenance, building maintenance projects and adult care services. As these

emissions are the result of activities performed by the supply chain, the Council has limited control over how the products and services are procured by the supplier and therefore little control over the associated emissions. The approach taken to reduce these emissions is to engage with the supply chain and encourage improvements in supplier's Scope 1 and 2 emissions.

The strategies involve rewarding and disincentivising practices, through both financial and non-financial means to nurture a low-carbon culture within the supply chain. These strategies can be summarised by four sub-categories:

- Building Capacity – Upskilling, public recognition, sharing learnings and resources
- Rewarding Progress – Reward positive performance, more appealing payment terms, long term investments
- Leveraging Procurement – Setting decarbonisation criteria, mandating carbon reporting
- Enforcing Performance – Carbon pricing, financial penalties

Residual Emissions

The ERMs outlined in this report seek to electrify as much of the energy demand as possible so that this demand can be supplied by green energy through the decarbonised electricity grid post-2035.

Limitations in the low-carbon technologies available means that there will be a small amount of carbon emissions generated that cannot be avoided by the Scope 1 & 2 target date of 2037. To achieve net-zero emissions, the Council can invest in projects that generate renewable energy. These projects must produce an amount of energy equivalent in carbon to the residual emissions, had they been the result of fossil fuel derived energy. The Council is in the process of developing a 2 MW solar PV project in the Cumbria region with a further 2 MW at the planning stage.

This, in combination with further roof-mounted solar PV (4.992 MWh per annum), which should allow the Council to achieve Net-Zero Scope 1 & 2 emissions by 2037.

Route to Net-Zero

The delivery workstreams outlined in this report provide a path to Net Zero Scope 1 and 2 emissions by 2037 and Net Zero supply chain emissions by 2050. The timelines for the building and transport emission reduction measures are presented in Tables 10, 11 and 12.

Key risks and opportunities

'Do-Nothing' will not deliver a managed reduction in the Council's emissions, however, the emission reductions that would be delivered by the decarbonisation of the UK electricity grid and engagement of the UK supply chain with the national net zero obligation, will deliver reductions in the baseline emissions.

The Buildings Emission Management strategy is supported by the projected decarbonisation of the UK national electricity grid supply. A reduction in the long-term grid emission targets will impact the amount of CO₂e savings delivered by the conversion from fossil fuelled to electric heating.

Cost savings, revenue generation and economics and social value are impacted by changes in electricity and natural gas prices. An increase in natural gas price will increase potential savings and improve the economic case for fossil fuel reduction. An increase in the electricity supply price will

negatively affect the economics of converting from fossil fuel to electric systems but will support the investment in renewable energy generation systems.

Capital investment will increase and decrease with project complexity; issues include planning restrictions and consents required for building alterations, and there will be specific risks associated with each individual project

Corporate Considerations

A strategy to achieve Net Zero for Scope 1 and 2 emissions by 2037 and Scope 3 emissions by 2050 will deliver against a number of key corporate policies and strategies detailed below:

The Council Plan for Westmorland and Furness Council was adopted in April 2023 when the new Unitary Council was established. The plan sets out the Council's vision, values and priorities for the next five years of its operations. The plan states that the Council will be at the 'forefront of tackling climate change and the challenges it presents. We will provide leadership in the drive to become carbon Net Zero'. This Carbon Management Strategy underpins one of the key priorities detailed in the Council Plan, which is 'to ensure that the area we serve becomes carbon **net zero by 2037**, and our organisation, as soon as possible'.

The Council Plan is supported by the **Delivery Plan Framework** which sets out the key projects the Council plans to carry out during the year and what it aims to achieve. The Carbon Management Strategy will help the Council deliver on aspects relating the strategic delivery themes of **Environment, Growth and Connections** by underpinning and supporting the following:

- Development of a solar farm in Barrow
- Rolling out of Carbon Literacy training for all staff and elected members
- Supporting growth in the clean energy sector and helping businesses to decarbonise
- Encouragement of people to travel sustainably
- Supporting the transition to electric and other non-oil based vehicles
- Developing a plan for maintenance and improvements of roads using sustainable practices by working with the supply chain
- Supporting the roll out of electric vehicle charging infrastructure

The Council agreed its **Climate Action Plan Part One** in July 2023. The plan 'lays the foundation of the Council's drive to respond to the climate emergency and aim to deliver Net Zero for Westmorland and Furness by 2037'. The plan focusses on six categories to tackle climate change and achieve net zero:

- The way we live
- The way we work
- The way we produce energy
- The way we protect nature
- The way we use things
- The way we travel

Key items detailed in the Climate Action Plan Part One and directly relevant to the Carbon Management Strategy include:

- Building fabric improvements
- Energy reduction measures
- Renewable energy and decarbonisation
- Investment in renewable energy to help the Council decarbonise its electricity supply; and

- Development of Local Cycling and Walking Infrastructure Plans.

The emerging Climate Action Plan Part Two has been co-designed by departments across the Council, to identify suitable actions to reduce emissions, reduce environmental inequalities and create a climate positive Council culture, building on the Council's 'ecologically aware' value.

The Action Plan sets out the Council's themes of climate action which have been designed to ensure there will be co-benefits to the Council's climate action. The plan contains over 100 actions, in the form of projects, policies, initiatives and process changes the Council will undertake to provide leadership in the goal for a Net Zero Westmorland and Furness.

The Council's adoption of Climate Action Plans Part 1 and 2, demonstrates the Council's commitment to becoming a Net Zero Council and the adoption of the Carbon Management Strategy further cements this commitment. The Carbon Management Strategy is crucial to achieving the objectives set out in the Climate Action Plan. The Action Plan and Carbon Management Strategy will sit side-by-side, and through development of the actions, there is likely to be synergy which could lead to opportunities such as the development of the Barrow Solar Farm, which contributes emissions savings to both net zero targets.

			2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	
Building Emission Management	Behaviour Change	Energy Awareness															
		Monitoring and Targeting															
		Energy Survey															
	Building Fabric	Windows															
		Doors															
		Roof insulation															
		Wall Insulation															
	Energy Reduction																
		LED Lighting															
		ASHP replacing boilers															
		AHU fan and control															
		AC controls															
		BMS Optimisation (Smart Buildings)															
	Local Renewables																
		Local PV															

Table 10: Building Emissions Management Timeline

			2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037	
Transport Emission Management	Management and Process Change	Council Fleet Telematics															
		Eco-driving e-learning															
		ICT Improvements															
		Improving Work-from-Home Capabilities															
	Infrastructure	Introduce EV															
		HVO Vehicles Support															
	Low Emission Technologies																
		Cycling and Walking Programme															

Table 11: Transport Emissions Management Timeline

		2024	2025	2026	2027	2028	2029	2030	2031	2032	2033	2034	2035	2036	2037
Building Emission Management	Behaviour Change														
	Building Fabric														
	Energy Reduction														
	Local Renewables														
Transport Emission Management	Management and Process Change														
	HVO Transition and Infrastructure														
	Low Emission Technologies														
Residual Emission	Large Scale Renewable Projects														
	Additional Insetting														

Table 12: Overall Reduction Measures Timeline



TETRA TECH

Tetra Tech Europe

Sustainability Team

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Cabinet Report

Report Title	Climate Change Action Plan Part Two
Date of Meeting	23 January 2024
Report Author	Corentin Cortiula-Phelipot Hannah Girvan
Director	Angela Jones, Director of Thriving Places
Lead Cabinet Member	Cllr Giles Archibald-Cabinet Member for Climate and Biodiversity
Why is this a key decision?	<p>1. an executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council’s budget for the service or function to which the decision relates, NO</p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are “significant” if they are equal to or greater than £500,000. YES</p> <p>For clarification, no treasury management decision shall constitute a Key Decision.</p>
Wards Affected	All Wards
Identify exempt information and exemption category	N/A
Reasons for urgency (only where applicable)	N/A
Appendices (if any)	<ol style="list-style-type: none"> 1. Climate Change Action Plan Part Two Report 2. Table of Actions 3. Equality and Diversity Assessment

1. Executive Summary

- 1.1 The purpose of this report is to outline and adopt part 2 of the Council’s Climate Change Action Plan.
- 1.2 On 11 July 2023, the Westmorland and Furness Cabinet approved the Climate Change Action Plan Part One.
- 1.3 The two-part Climate Change Action Plan is the council’s strategic response to its shadow council Climate crisis declaration and the commitment ‘for the Climate’ in the Westmorland and Furness Council Plan.

- 1.4 The approved part one action plan sets out the council's vision and ambition to tackle the Climate Crisis and achieve its Net Zero targets.
- 1.5 The Part two action plan has been developed by the Climate and Nature team, working in conjunction with departments across the council, to identify suitable actions to reduce emissions, reduce environmental inequalities and create a climate positive council culture, building on the council's 'ecologically aware' value. Please see appendices 1&2.

2. Recommendations

For the reasons set out in this report, Cabinet is recommended to:

- 2.1 Approve part two of the Climate Change Action Plan and affirm the commitments set out in the plan.

3. Information: the Rationale & Evidence for the Recommendations

- 3.1 Westmorland and Furness's Shadow Authority confirmed that we face climate and biodiversity crises on the Wednesday 18th September 2022 which will have potentially catastrophic impacts locally, nationally and internationally.
- 3.2 The motion committed the council to (a) reducing its own carbon emissions to net zero as soon as possible; (b) working with others to target a net zero carbon Westmorland and Furness by 2037; and (c) increasing biodiversity by, for example, restoring natural habitats, restricting invasive species and reducing pollution.
- 3.3 The commitments made in the shadow authority declaration formed part of the Council Plan. Within the Council Plan, one of the six priorities was 'For the Climate', reaffirming ambition to be carbon net zero by 2037 and to address biodiversity loss.
- 3.4 The Council Plan sets out the council's values, which includes 'Ecologically aware': "we will provide leadership in the drive to become carbon net zero and sustainable".
- 3.5 As part of wider stakeholder engagement around the development of Westmorland and Furness Council's Climate Action Plan Part 2, there has been extensive internal consultation, as well as significant external consultation.
- 3.6 The Climate and Nature team supported the Portfolio Holder, Cllr Archibald, in developing a series of 'Climate Conversations' as part of the public engagement for the development of this action plan. There were five events held, one in Barrow, Ulverston, Kendal and Penrith where a broad section of councillors helped to support these conversations and encouraged residents to give the council their views on how to tackle climate change. There was also an online session held which was open to all residents.

- 3.7 The 'Climate Conversations' have been the first of a series of events, set out in the Launch Event, that show the councillors reaching out into their communities. The Climate and Nature team will be supporting our Portfolio Holder and members with 'Nature Conversations' in March.
- 3.8 The Climate and Nature team are also worked closely with the Zero Carbon Cumbria Partnership to develop a workshop with the Cumbria Sustainability Network, a network of local community climate groups.
- 3.9 This iterative plan sets out actions the council will undertake over the duration of the plan.
- 3.10 This will be monitored against measurable key performance indices, with regular updates to relevant portfolio holders, and the full governance will be subject to a later paper, outlining the programme of work.
- 3.11 Working with others to target a net zero carbon Westmorland and Furness by 2037 is a very ambitious aim. The council cannot do this alone and must work in partnership with our businesses, NGOs and communities. Whilst local authorities are only directly responsible for 2-5 per cent of local emissions, through their policies and partnerships they have strong influence over more than a third of emissions in their area (Climate Change Committee, 2020).
- 3.12 The actions are divided into 6 categories – The Way we Live, The Way we Work, The Way we Travel, The Way we Produce Energy, The Way we Use things and the Way we Protect and Enhance Nature.
- 3.13 This is a 5-year plan that will be reviewed regularly and updated annually. With a full review to happen in 2029. The actions are focussed on current actions, short term actions which will take place in the next 5 years and longer-term actions post 2029.
- 3.14 Each action that does not come with externally sourced funding will need to go through the council's decision-making process at the appropriate time and require a full business case.
- 3.15 Given that this is a collaborative process and many of the factors are outside of the council's direct control, we need to be adaptive to changes, for example, in government policy, global events and our residents' requirements.
- 4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)**
- 4.1 This proposal is the council's strategic response to the council plan priority 'For the Climate'. With the part one action setting out the council's vision and ambition to deliver on this priority and part two will be a delivery plan for this priority.
- 4.2 The proposed action plan includes a section which outlines how the Council's Climate Change Action will deliver on all 5 of the other council plan priorities, looking at the co-benefits of addressing climate change.

- 4.3 The Climate Change Action Plan strives to find a balance in delivering on the Climate priority while still delivering for people, communities, economy and culture, customers and the workforce.
- 4.4 The Council Plan is supported by the **Delivery Plan Framework** which sets out the key projects the Council plans to carry out during the year and what it aims to achieve. The Carbon Management Strategy will help the Council deliver on aspects relating the strategic delivery themes of **Environment, Growth, Communities, Homes, Learning, Health and Wellbeing**. Our environment positively impacts on health, wellbeing and economy and together we build our resilience to climate change and take action to reverse biodiversity loss and to achieve carbon net zero.

5 Consultation Outcomes

- 5.1 In the development of this part two action plan, the Climate and Natural Environment Team ran engagement sessions with all Directorate Management teams to discuss actions relating to their teams.
- 5.2 In the development of this Part Two Action Plan, the Assistant Director of Climate and Natural Environment hosted an Away Day Workshop on 4th July 2023 to lay the foundation of the council's Climate and Nature strategies with the Assistant Directors and Directors.
- 5.3 Following the Away Day, meetings were held between the Climate and Nature Team and Senior Managers of each directorate to agree actions they would take to help Westmorland and Furness meet its Net Zero target of 2037.
- 5.4 The Climate and Nature Team assisted Cllr Giles Archibald in hosting Climate Conversations events with the public to help shape and inform Part Two of Westmorland and Furness Council's Climate Action Plan.

6 Alternative Options Considered

- 6.1 The alternative option would be for the Cabinet to not approve this Part Two Action Plan and set out an alternative strategic course to tackling the Climate Crisis and delivering on the council plan commitment; 'For the Climate'.

7 Financial Implications and risk

- 7.1 There are no direct financial implications of the recommendation contained within this report. The Climate Change Action Plan provides a plan for the delivery of the Councils 'Climate' priority.
- 7.2 A number of these actions will have a financial implication for the Council and business cases will be developed for these. As part of the business case the financial implication will need to be considered along with the acceptance of external funding and in some cases the identification of additional funding to support delivery of the action.

7.3 There is a risk that actions are identified as not deliverable when the business cases are considered due to their affordability and value for money.

8 Legal & Governance Implications

8.1 Whilst no foreseeable legal implications arise directly from Part Two of Westmorland and Furness Council's Climate Action Plan, each action as set out above will need to be assessed on its merits and will be subject to its own consultations and decision making procedures.

9. Human Resources Implications

9.1 The Council's two part Climate Change Action Plan will need to be reflected within the key strategic aims and priorities of the workforce plan, ensuring that we embed climate change and the need to be ecologically aware within our organisational culture change programme and our HR policies and practices.

10 Equality and Diversity Implications (including the public sector equality duty)

10.1 See appendix 3.

11 Background Documents

11.1 Climate Change Action Plan Part One

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Westmorland and Furness – Climate Change Action Plan Part 2

Plain version – designed version to follow.

Foreword from Cllr Archibald:

Westmorland and Furness Council is a brand-new council. This provides a huge opportunity to create a fresh vision for our communities, residents and our environment. We are driven to act in response to climate change by our values; being ecologically aware, ambitious, inclusive, collaborative and responsible. We accept our responsibility in tackling climate change, and we will aim to provide local trusted leadership in the drive to become net zero.

We are committed to:

- Demonstrating leadership by becoming net zero as a Council by 2037 for scope 1 and 2, and 2050 for scope 3 at the latest, through the decarbonisation of our assets, operations and footprint;
- Working with our partners and communities in the drive to become net zero by 2037 across the Westmorland and Furness area;
- Engaging with our communities on how we respond to climate change, with increasing levels of locally led action; and
- Preparing our communities and leading on adaptation solutions for potential climate risks including flooding.

I welcome this Action Plan as an important first step in outlining how Westmorland and Furness Council will meet these commitments while delivering our essential services and meeting our Council Plan priorities.

“We are at a crossroads. The decisions we make now can secure a liveable future. We have the tools and know-how required to limit warming.”

Hoesung Lee (Chair, Intergovernmental Panel on Climate Change, 2019)

Introduction

Building on its Council Plan priority to tackle climate change and provide leadership on the drive to net zero, in July 2023, the Westmorland and Furness Council's cabinet approved the Climate Action Plan Part One, signalling its ambition, through working in partnership with others, to achieve a net zero Westmorland and Furness by 2037.

Part One (Appendix 1: Climate Action Plan Part One) sets out the council's vision and objectives in delivering climate action. It showcases ongoing climate action; projects, policy and activities the council is delivering and supporting. In short, Part One set out our commitment and actions already undertaken, while Part Two is focused on what we will do going forward, as a council, to address the climate crisis.

This Plan will review the context of the climate crisis: climate impacts and greenhouse gas emissions. We will introduce our cross-cutting themes which will guide how we tackle climate action and balance our council priorities. The identified actions show how we will reduce emissions across the area, support a just transition for our communities and become a low-carbon council.

This Action Plan is led by the visions and priorities set out in the Council Plan, linking to the sustainability principles of equity, economy and environment running through the 10 delivery themes within the delivery framework.

This plan will sit alongside many strategies and action plans being created by the new authority, including; the New Local Plan, the Economic Strategy, the Local Transport Plan, and our Electric Vehicle Strategy. We will follow this climate action plan with action plans focused on nature and biodiversity as well as on climate adaptation.

This Plan is:

- Based on our current understanding and evidence which will develop and evolve over time.
- An action plan which sets out steps the Council will take to reduce emissions within Westmorland and Furness.
- A plan that has been developed in collaboration with key partners and aims to reflect the views of residents.
- Flexible. We will update this annually to ensure that it aligns with evolving policy, legislation and council budgets.
- An action plan that builds on the positive actions taken by the sovereign councils, community groups, businesses, partners and residents.
- Designed to support, coordinate, and facilitate climate action.

This Plan is not:

- The overall solution to becoming net zero by 2037, it's a step along that journey.
- A fixed pathway to reduce emissions in a linear way.
- Perfect: We are a new council, and we are developing our strategies, projects and approach. We will not get everything right in achieving net zero but will learn from any mistakes and be open to feedback.

Each action that does not come with externally sourced funding will need to go through the council's decision-making process at the appropriate time and require a full business case.

Strategic Context

Westmorland and Furness Council has identified six key strategic priorities in our Council Plan:

1. Climate – providing leadership to become carbon net zero
2. Communities – confident, empowered and resilient communities
3. Customers – customers at the heart of everything we do
4. Economy and Culture – sustainable, inclusive economic growth
5. People – supporting people in need, reducing inequality. Supporting active healthy lives for young and old
6. Workforce – confident, empowered and inclusive workforce

Within the ten detailed missions set out in our Council Plan Delivery Framework, aiming to deliver carbon net zero by 2037 is identified as one of the key measures of success in our Environment mission.

All ten missions are grounded in the three sustainability pillars of equity, economy and environment. The delivery themes supporting the Council Plan prioritises are found in Figure 1.

We recognise that in developing this Climate Change Action Plan that there are both positive impacts across these three pillars and potential tensions between them that must be recognised and considered carefully as we progress.

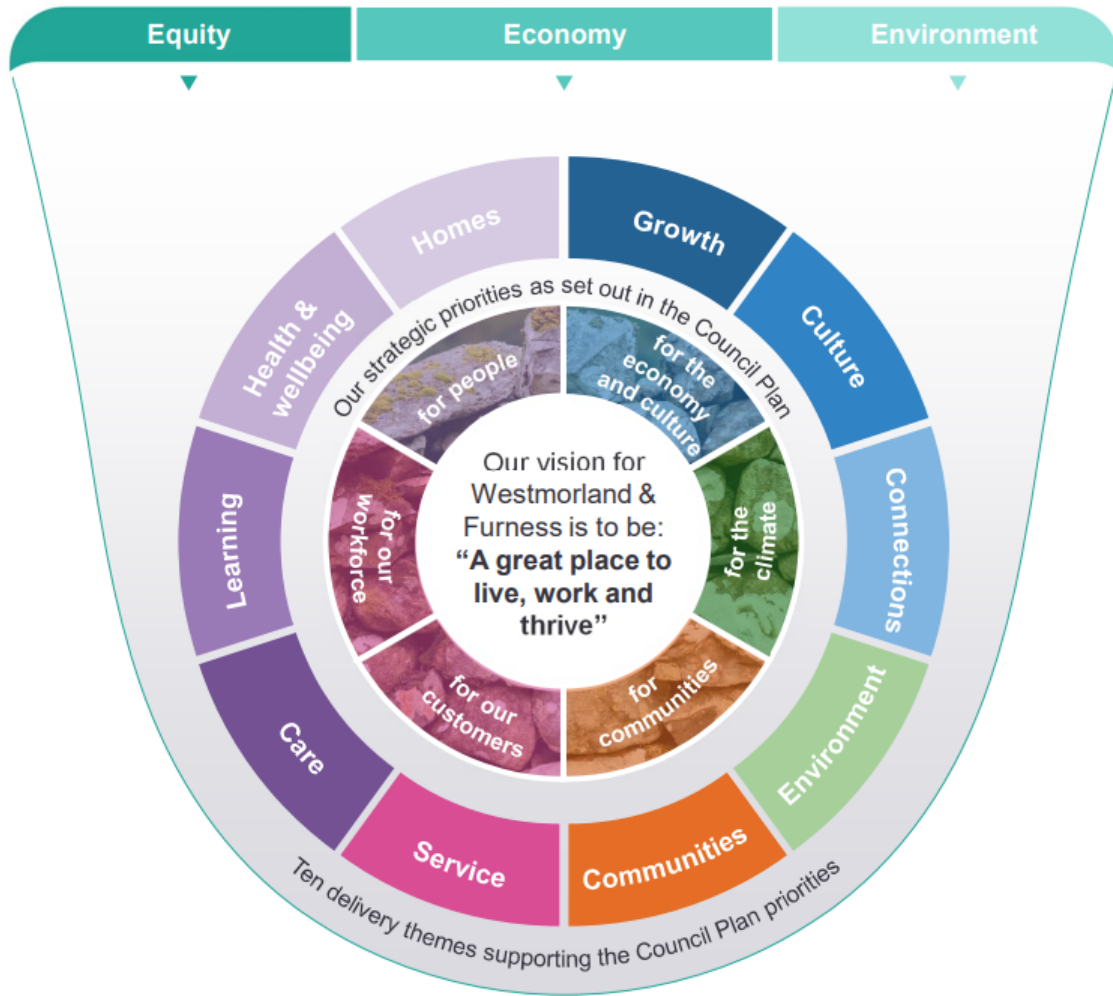


Figure 1 - Westmorland and Furness Council's strategic priorities and delivery themes as set out in the Council Plan.

As such, this Climate Action Plan delivers clearly on the Council's strategic vision and priorities and provides a vital framework for how the council will develop future strategies and policy.

Westmorland and Furness Council has agreed a Target Operating Model to guide the development of the council's approach to delivering services. Our approach to tackling climate change sits across all layers of the operating model.

The Council's Sphere of Influence and Scope of this Plan

When considering the scale of emissions reduction required to become net zero and the vision set out by this action plan, it is important to consider the different levels of influence that Westmorland and Furness can have on mitigating Climate Change in the district.

As a unitary authority, Westmorland and Furness is in a strong position as the local authority responsible for all local government functions within the area. These functions include, but are not limited to, planning, transport, waste, flood management, public health, culture and events, housing, air quality and council tax.

Therefore, it is helpful to identify what Westmorland and Furness's sphere of influence on net zero is. The Climate Change Committee has identified six 'spheres of influence' that councils have over carbon emissions, as illustrated in Figure 2.



Figure 2 – The Spheres of Influence Local Authorities have over carbon emissions. (Climate Change Committee. 2020. Local Authorities and the Sixth Carbon Budget - <https://www.theccc.org.uk/wp-content/uploads/2020/12/Local-Authorities-and-the-Sixth-Carbon-Budget.pdf>)

Whilst local authorities are only directly responsible for 2-5 per cent of local emissions, through their policies and partnerships they have strong influence over more than a third of emissions in their area (Climate Change Committee, 2020).

This highlights that we cannot and will not do this alone, we must link in with partners, businesses and communities to all play a part in helping the area of Westmorland and Furness reach net zero.

As a local authority aiming for net zero by 2037, there are many limitations. The National Government is responsible for setting laws, budgets, environmental policy, agricultural policy and planning policy. Subsequently, the National Government has a much greater sphere of influence in tackling production emissions. Local Authorities also have limited influence over industry and business, which is responsible for commercial and energy production-based emissions, and much of the consumption-based emissions.

We are aiming high, with an ambition to achieve net zero by 2037, recognising that much can be achieved in partnership and through leadership.

Context (What is Climate Change)

Climate change can be characterised as a long-term shift in global temperature and the change of local and national weather patterns. The changes observed in the Earth's climate since the 20th century are primarily driven by human activity and particularly, by burning fossil fuels which increases the amount of greenhouse gases in the Earth's atmosphere.

Climate change causes a wide range of negative impacts including increased heat, drought, intense storms and rising sea levels; these impacts in turn harm wildlife, damage habitats, risk lives and cause serious disruption to people's livelihoods.

The dangers associated with climate change have been explored for decades but in 2015, the legally binding treaty known as the Paris Agreement was adopted by 196 Parties at the Conference of the Parties (COP) 21 event held in Paris. This Agreement aims to limit global warming to below 2°C – or preferably 1.5°C – when compared to pre-industrial levels. Whilst varying efforts have been made by individual countries, in 2018 the Intergovernmental Panel on Climate Change (IPCC) published their Special Report on Global Warming of 1.5°C and their Climate Change Synthesis Report in 2023, which identified that limiting warming to 1.5°C and 2°C involves an immediate greenhouse gas emission reduction (Figure 3).

Limiting warming to 1.5°C and 2°C involves rapid, deep and in most cases immediate greenhouse gas emission reductions

Net zero CO₂ and net zero GHG emissions can be achieved through strong reductions across all sectors

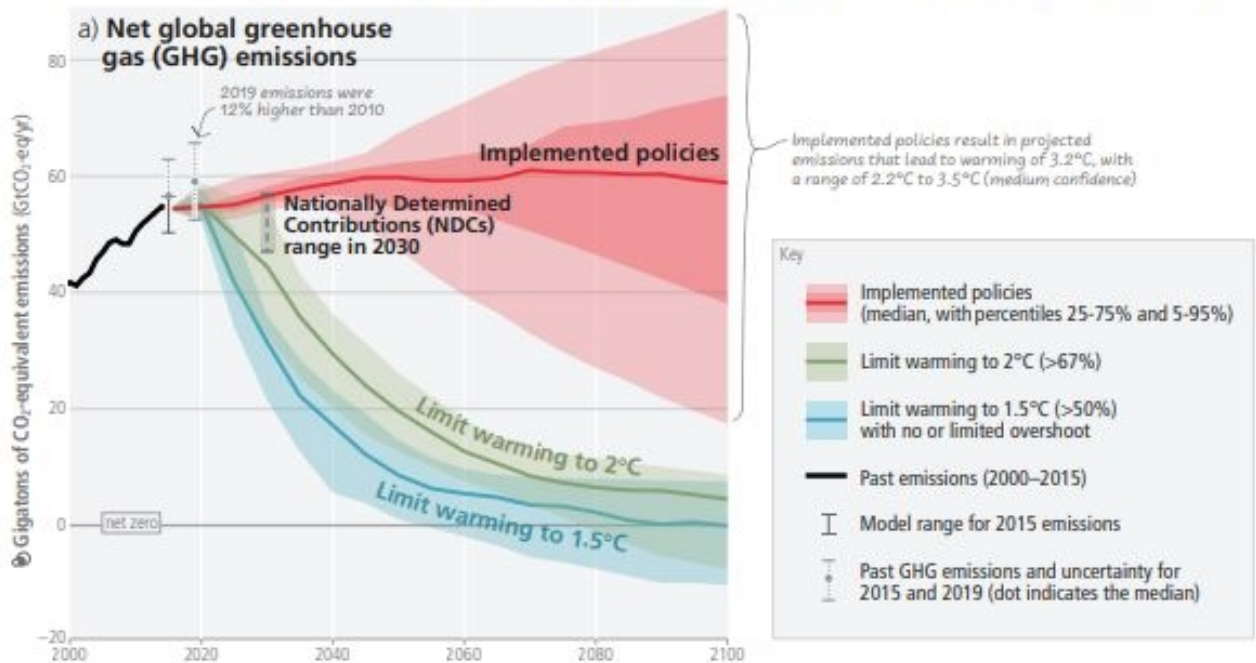


Figure 3 - The IPCC (2023) Climate Change Synthesis Report ([IPCC AR6 SYR SPM.pdf](#))

The Figure 3 shows the global emissions pathways. The red ranges represent the emissions pathways assuming that the policies were implemented by the end of 2020. The light blue ranges represent the limit warming to 1.5°C with no or limited overshoot and the green ranges shows the limit warming to 2°C.

In 2018, the IPCC (Special Report on Global Warming of 1.5°C) emphasised that without increased and urgent mitigation in the coming years, leading to a sharp decline in greenhouse gas emissions by 2030, global warming will surpass 1.5°C in the following decades. This will lead to irreversible loss of the most fragile ecosystems, and crisis after crisis for the most people and societies, especially those in vulnerable situations.

The report found that global emissions must be reduced by at least 45% by 2030 to meet the 1.5°C target and the IPCC expressed that international governments, businesses, and communities must cooperate to reach this goal. Global emissions must therefore reach net zero, which is the target of negating the amount of greenhouse gas emissions produced by human activity, such as through reducing emissions and implementing carbon sequestration methods.

This was a scientific global call to action, which was answered nationally and locally. The UK adopted a net zero 2050 target based on the Committee on Climate Change's 2019 report and Westmorland and Furness shadow authority set out a motion confirming we face climate and biodiversity crises on the 18th of September 2022.

However, in 2022, a UN report found that the international community is falling far short of the Paris goals, with no credible pathway to 1.5°C in place (UN, 2022).

Emissions Gap Report 2022). Based on current levels of worldwide commitments and policies, we are on track to experience in the order of 2.8°C globally. This will lead to catastrophic changes in global climatic conditions including major sea level rise due to polar ice cap melt. These changes have already affected Westmorland and Furness through extreme weather events such as Storms Desmond (2015) and Arwen (2021). A temperature rise in the region of 2.8°C or more would risk further fluvial flooding, coastal flooding, droughts and heatwaves in the Westmorland and Furness area.

Westmorland and Furness will use its influence as a local council where possible, but to address climate change we must work with partners, businesses and communities. For example, through linking with key partners within the Zero Carbon Cumbria Partnership, Westmorland and Furness Council have agreed to set our area target date as 2037 which was shown to be possible by the Cumbria Carbon Baseline Report in 2020 commissioned by the ZCCP. We will be relying on the data from an updated version of this report (Appendix 2: Zero Carbon Cumbria – Summary of greenhouse gas emissions in Westmorland and Furness and trajectories to net zero, June 2023 – Small World Consulting on behalf of ZCCP), for our action plan as it is the most relevant data available for our locality.

Westmorland and Furness' Climate

The Cumbrian climate is influenced by the North Atlantic Drift, along with the mountainous terrain. This combination makes Cumbria the wettest region of England. The average annual precipitation is about 3,000mm but this varies greatly depending on the location.

Figure 4 shows that the annual mean temperature for the Northwest of England and the North of Wales has been following the same tendency as the global earth temperature (shown in Appendix 1: Climate Action Plan Part One). Since 1884, the temperatures are getting progressively warmer.

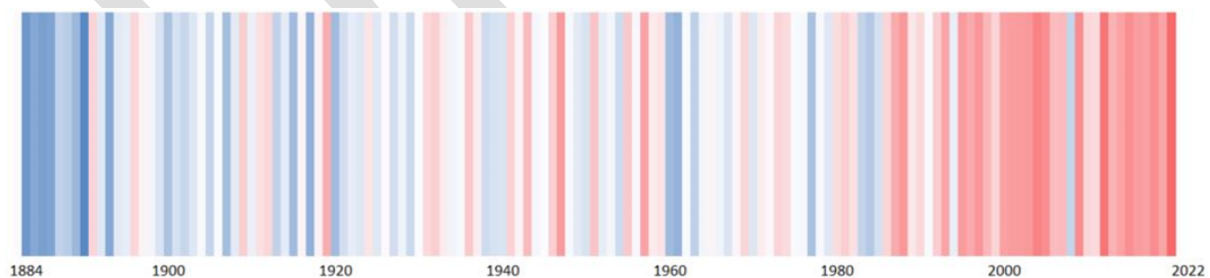


Figure 4 - Northwest England and North Wales warming stripes, 1884-2022

Emissions

Our understanding of our carbon emissions in Westmorland and Furness is supported by the work of the Zero Carbon Cumbria Partnership and Small World Consulting, who have developed an emissions baseline for the area (found in Appendix 2: Zero Carbon Cumbria – Summary of greenhouse gas emissions in Westmorland and Furness and trajectories to net zero, June 2023 – Small World Consulting on behalf of ZCCP).

Although the data available does have its limitations, it is an excellent indicator of the scale of the challenge facing Westmorland and Furness' Net Zero target. Similarly, the data shows the key sources of emissions that are influenced by the behaviour and choices of Westmorland and Furness' residents and visitors. Details on the methodology used for calculating the Carbon Baseline can be found in Appendix 2 (Zero Carbon Cumbria – Summary of greenhouse gas emissions in Westmorland and Furness and trajectories to net zero, June 2023 – Small World Consulting on behalf of ZCCP).

Figure 5 shows the GHG emissions associated with Westmorland and Furness. (All figures are tonnes CO₂ equivalent).

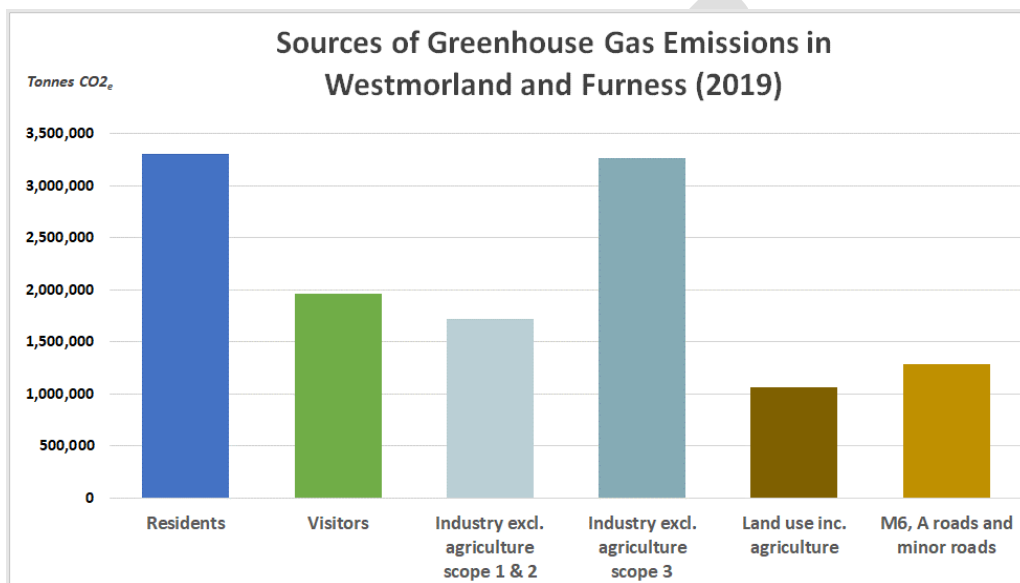


Figure 5 - Sources of emissions in Westmorland and Furness (2019) from the Zero Carbon Cumbria Partnership (ZCCP) emission baseline report.

Notes on the calculations:

- *The resident, visitor and industry emissions have been calculated on a consumption basis to take account of the emissions produced in Westmorland and Furness (scope 1 and 2) and those associated with the upstream supply chains (“upstream scope 3”).*
- *The emissions from land use including agriculture have been calculated on a territorial (aka production basis, or “scope 1 and 2”), with inclusion of emissions from the energy supply chains.*
- *The emissions associated with roads have been calculated on a consumption basis and include the tailpipe emissions of vehicles travelling along these roads (including through traffic) and the associated fuel supply chains.*
- *The methodology for the emissions baseline produced by Small World Consulting is focused on a consumption-based emissions profile. Which means emissions production, which is predominantly energy production, is not captured in their carbon baseline data.*

Impacts

As outlined in part one, climate change causes a wide range of negative impacts, or climatic events, which can harm wildlife, damage habitat, cause serious disruption to people's livelihoods and may risk human life.

5 key climatic impact themes have been identified as being the most severe climate risks for Westmorland and Furness. The themes discuss the broad hazards that the region faces from climate change.

River and surface water flooding: Westmorland and Furness is susceptible to river and surface water flooding. Climate change is projected to increase winter rainfall, to increase the likelihood of severe winter gales, and increase the likelihood of intense summer rainfall events, further increasing the vulnerability of the area to flooding.

Extended dry periods leading to pressure on water supplies: Reduced summer rainfall in Westmorland and Furness will increase the likelihood and duration of drought conditions and water scarcity. Prolonged periods of reduced water availability will affect commercial forestry, agricultural productivity, as well as habitats and species. Extended dry periods increase the risk of wildfires, a key climatic impact to Cumbria identified by the Met Office.

Extreme temperature changes (heatwaves and cold spells): Average temperatures, the number of hot days and periods of extreme heat are expected to increase because of climate change. Likewise, the frequency and severity of cold spells are expected to increase. Extreme temperatures are likely to cause disruption to travel, negative health implications, negative effects to habitats, and increase the risk of pathogens and pests.

It is important to note that projections for changes in the gulf stream and ocean current would likely result in extreme low temperatures across the UK. Climate change is impacting the stability and variability of the Atlantic Meridional Overturning Circulation (AMOC), the warm surface and deep-water currents in the Atlantic Ocean. A recent study suggests the AMOC is losing stability and is at risk of collapse, due to the rising temperatures and associated ice melt affecting the salinity of the ocean (Boers, 2021). While a weakening AMOC would still see rising temperatures with climate change (Met Office, 2023), a total collapse would cause much colder weather.

Sea level rise (coastal erosion and flooding): The total rise in sea level around the UK coast may exceed one metre by 2100 (Met Office, 2018. UKCP18 Marine Report). With a 4°C increase in global temperature by 2115, projections suggest sea level in north-west England could rise by between 0.9-1.25m. Wave height, storm surges and offshore wind speed are also expected to increase because of climate change, resulting in more intense storm events and greater impacts from coastal flooding and erosion.

Cascading Impacts: Multiple hazards occurring unpredictably or sequentially create cascading impacts, which may cause significant disruption to services and natural systems. The interaction between cascading impacts increases the vulnerability of Westmorland and Furness' communities, infrastructure and natural environment, and

require significant planning and response from our Joint Emergency Management and Resilience Team.

As well as the climatic impacts above, there are social and mental health impacts of a changing climate on our residents. In 2022, the IPCC stated that there is a very high confidence that climate change has adversely affected mental health. Whether it's the mental health impacts of flooding, or prevailing Eco-Anxiety, of which a national YouGov poll commissioned by Friends of the Earth (2020) found two-thirds of people in the UK experience.

Climate Adaptation

Reducing greenhouse gas emissions is essential in ensuring that we do not experience catastrophic changes in global climatic conditions, including sea level rise and increased frequency of extreme weather events causing irreversible damage. However, with impacts of climate change already experienced in Westmorland and Furness, it is evident that emission reduction alone is not enough.

It is also necessary to prepare for these worsening climate impacts, a process known as Climate Adaptation.

Our target for adapting to climate change is:

“Westmorland and Furness Council will continue to respond to climatic events and build resilience within our communities, industries and natural environment.”

Whilst this Climate Action Plan largely focusses on net zero and emission reduction, climate adaptation is considered and a separate Climate Adaptation Plan will be developed by the end of 2025 and will be based on an understanding of the climate risks we face locally, as well the national adaptation policy. We will be aiming to protect Westmorland and Furness' communities in vulnerable situations, businesses, infrastructure, services and natural environment from unavoidable changes from climatic events.

Nature and Biodiversity Action Plan

Tackling the nature emergency is imperative to the work we do at Westmorland and Furness Council. We are committed to working with partners and embrace opportunities to achieve nature recovery at a landscape scale in Westmorland and Furness. Therefore, a Nature and Biodiversity Action Plan will be published in 2024, outlining Westmorland and Furness Council's commitment to nature recovery, biodiversity net gain, nutrient neutrality, habitat restoration, species protection and creating accessible green space. In addition, the Cumbria Local Nature Recovery Strategy will be developed in 2024 to generate investment into nature recovery.

This Climate Change Action Plan Part Two, and our actions in Appendix 3: Westmorland and Furness Council's Climate Actions, focuses on net zero and emission reduction for the way we enhance nature. The actions, therefore, will explore the potential to decarbonise the management of our natural environment, the potential for carbon sequestration in nature and actions helping to create resilient environments.

Co-benefits

In our Part One (see Appendix 1: Climate Action Plan Part One), we outlined the importance of the co-benefits of our work to reduce emissions across the area. Through the development of our council plan delivery framework, and understanding our key priorities as a council, we have developed four themes (health, equality, rurality and green growth) which will underpin and inform our climate action. These themes will be considered in the development of this action plan and future projects.

Health

Supporting our residents to have healthy lives is part of our Council's ethos and climate change represents a significant risk to our residents' health. Our climate action will be targeted at limiting impacts on health and adapting to the health risks of a changing climate.

The health of the environment we live in is closely related to our health and wellbeing. Extreme weather, including flooding, storm surges and heatwaves, can directly impact on our physical and mental health through injuries, illness and trauma (Rocque et al. 20221). The impacts of climate change on the environment also indirectly impact health, by increasing the risk of infectious diseases and increasing the likelihood of illnesses associated with poor air quality (Rocque et al. 2021). Furthermore, climate change can also indirectly impact health by reducing the availability of safe drinking water and food caused by rising sea levels, droughts and reduced crop production, leading to malnutrition, scarcity of resources and forced migration (Adger et al. 2014). The health effects of climate change will disproportionately impact some people in society more than others (Institute of Health Equity, 2020). Health inequalities are unfair, avoidable and systematic differences in the health and wellbeing of different groups and communities in the population. There is a risk that climate change will widen these disparities in health inequalities through greater impacts on communities already facing disadvantages (Institute of Health Equity. 2020).

Therefore, acting on climate change will have both direct and indirect positive effects on health and wellbeing, as well as reducing health inequalities. Health equity must therefore be at the centre of our local priorities.

Equality

Our populations that are in vulnerable situations are likely to be disproportionately impacted by climate shocks and be slower to mitigate their emissions. We will, therefore, ensure a just and fair transition to net zero.

Certain social groups are particularly susceptible to the impacts of climate change. These include single parent households and carers (who are disproportionately female), people with a disability and the elderly. Some of the reasons for their vulnerable situation lies in the intersectionality of their geographical locations, their financial and socio-economic circumstance, their cultural and gender identity, and their access to services and decision making. Communities that are in the most vulnerable situations can also be disproportionately impacted by climate change mitigation measures, which can place a higher financial burden on low-income households. For example, decisions that expand public transport or carbon pricing may lead to higher public transport fares which can have a greater impact on rural, low-income groups.

Although there are also opportunities through addressing climate change issues to also help other issues, for example better insulation for housing can help reduce fuel poverty.

We will be mindful of, and consider carefully, the potential impacts of the choices the Council make in tackling climate change, aiming to maximise the benefits to communities.

Rurality

Westmorland and Furness is a predominantly rural area. These areas face a different set of challenges to that of urban areas especially when tackling climate change. Some of those challenges faced by our residents include limited availability of public transport, or access to suitable employment. The rural nature of the area also poses challenges to the Council, for example, we need more vehicles and crew to complete waste collection rounds. Westmorland and Furness Council is demonstrating national leadership in overcoming these rural challenges through the Pathfinder Places project and will continue to assess our climate action through a rural lens.

Green Growth

Westmorland and Furness Council is committed to maximising the opportunities to deliver green and inclusive economic growth. In order to achieve net zero by 2037, we must ensure our climate action is creating favorable market conditions to invest in net zero technologies and invest in our natural capital.

Westmorland and Furness Council can support local businesses to decarbonise; giving advice, funding opportunities and working with partners to help facilitate this.

The Council is providing up to £571,359 of funding through the UK Shared Prosperity Fund (UKSPF) to support the establishment of Cumbria Action for Sustainability's Green Enterprise Hub. Working with a range of partners, this will support up to 300 local businesses to reduce their carbon footprint by March 2025.

We will also work closely with other partners including the Cumbria Local Enterprise Partnership, Cumbria Chamber of Commerce, Cumbria Social Enterprise Partnership, Farmer Network, Cumbria Tourism and Business Improvement Districts to ensure that decarbonisation, climate action and green growth goals are embedded in all business support provision in the area.

We will encourage inward investment, business growth and the delivery of new commercial and residential developments that can provide inclusive, green and sustainable growth.

Investment in innovative and green industry sectors such as clean and renewable energy will be promoted. This will be backed by a skills and employment plan which looks to support the education and training provision needed to create new and sustain existing green jobs. Westmorland and Furness Council are supporting the Land and Nature Skills Service to help us understand our needs and opportunities in our area. We must ensure we upskill local people so that all can have access to "green jobs", this can help with community wealth building, helping to support local firms transition to the green economy.

Climate and nature ambitions can be integrated into the delivery of Government growth deal funding including the UKSPF, Borderlands Inclusive Growth Deal, Levelling Up Fund and Brilliant Barrow Town Deal.

Climate action and sustainability will be built into the design of new town centre regeneration and public realm schemes. This will include encouraging active travel options, creating and improving green spaces and providing improved public recycling and waste options so that environmental sustainability is at the heart of our town centre offer. We will also work with partners such as Cumbria Tourism to encourage green growth of the visitor economy and sustainable tourism.

Trajectories to Net Zero

We have committed to reaching net zero emissions by 2037 but this is dependent on the scale and pace of action locally, regionally and nationally. We are aware that becoming net zero by 2037 will be difficult and we must be realistic that it is heavily reliant on action outside of our control and sphere of influence (see Figure 8). However, it is crucial we do everything within our power and control to reduce emissions in our area, inspiring partners to do the same.

ZCCP's baseline report (See Appendix 2: Zero Carbon Cumbria – Summary of greenhouse gas emissions in Westmorland and Furness and trajectories to net zero, June 2023 – Small World Consulting on behalf of ZCCP) found that to deliver Westmorland and Furness's share of the global efforts to limit warming by 1.5°C, we will need to achieve an overall trajectory to net zero emissions by 2037 for energy use in buildings, resident, visitor and industry travel, food and drink, other goods/products, industrial processes and land use (excluding agriculture). These priority areas have a 2019 baseline of 4.8 MtCO_{2e}.

As shown in Figure 6, Small World Consulting recommends the following trajectory, starting from the 4.8 MtCO_{2e} 2019 baseline.

Trajectories to net zero by 2037 - Westmorland & Furness

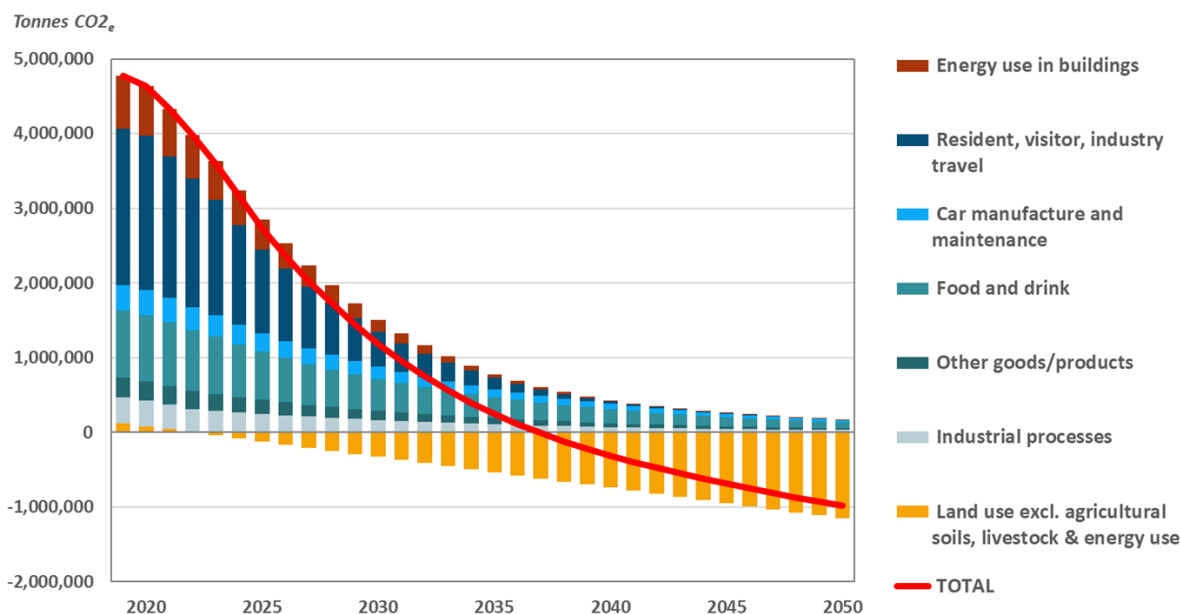


Figure 6 - Westmorland and Furness' trajectories to net zero (Small World Consulting data from a 2019 baseline).

The trajectory shown in Figure 6 outlines the magnitude of the challenge ahead.

Actions (how we will deliver)

We have developed a 5-year Climate Action Plan which explains how the Council will achieve key steps towards our net zero pathway by 2029 and embark on aiming to deliver net zero across Westmorland and Furness by 2037.

This Climate Action Plan seeks to build on the progress delivered already by the sovereign councils. Our actions, found in Appendix 3: Westmorland and Furness Council's Climate Actions, are a range of projects, policies, activities and processes Westmorland and Furness Council are committing to, to reduce emissions and tackle climate change across the district.

We have included a timescale on the actions whether they are:

- In progress – already underway from year 1
- Short Term – aiming to be achieved within 5 years
- Long Term – actions that will help the Council achieve its 2037 target.

We have linked the Actions to Crosscutting Co-Benefits Themes which are also key priorities for the Council, these are:

Health, Green Growth, Equality and Rurality.

How have actions been identified?

The actions identified in our Climate Action Plan have been developed by:

- Preliminary analysis of the recommendations of the two climate citizen juries (Furness and Kendal);

- Preliminary analysis of actions contained within the Barrow Borough Council Climate Change Action Plan, the Cumbria County Council Carbon; Management Plan, Eden District Council Zero Carbon Strategy, and South Lakeland Climate Change Action Plan;
- Using best practice from across the UK and further afield including the One Planet net zero Navigator Tool;
- Incorporating the recommendations of the Westmorland and Furness Local Government Reorganisation sub-group and member workstreams;
- A Westmorland and Furness senior leadership Climate and Nature away day
- Analysis of the Council's Feasibility study from the Pathfinder Places;
- A two-month internal engagement process, meeting, discussing, and enabling thinking with every department across the Council;
- A series of Climate conversations with residents in Barrow, Kendal, Penrith, Ulverston and online; and
- A workshop with community groups part of the Cumbria Sustainability network.
- Using the Cumbria Transport Infrastructure Plan (CTIP –our Local Transport Plan) which contains reference to our Bus Service Improvement Plan (BSIP) and LCWIPs.

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Six Key Themes:

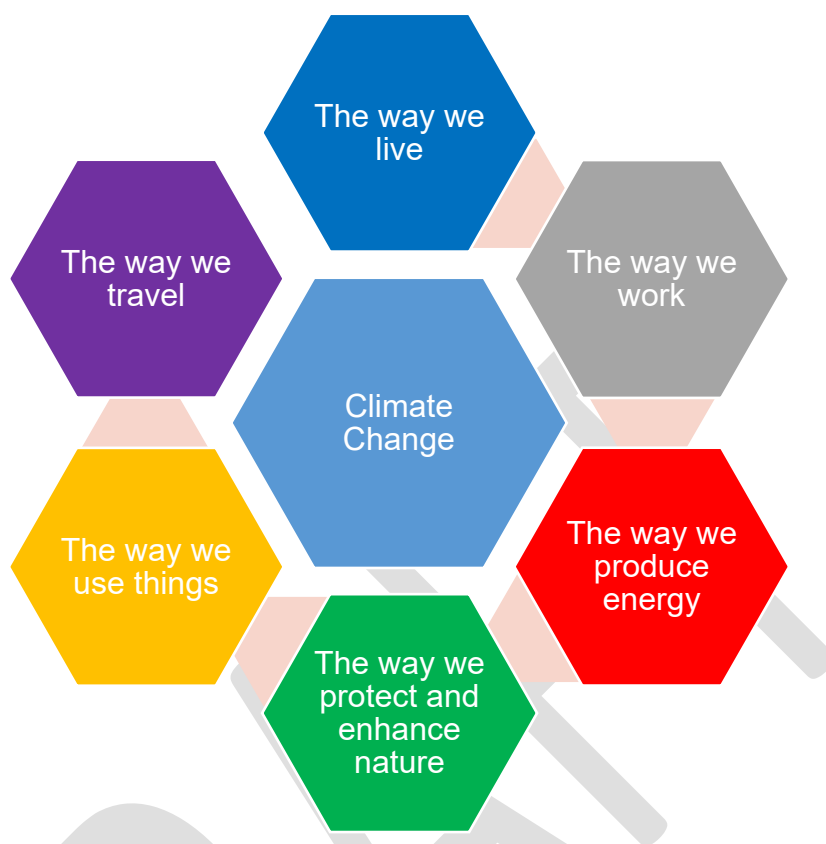


Figure 7 - Westmorland and Furness Council's key themes to reach net zero

We have identified six key themes to categorise our climate action, as shown in Figure 7. These themes incorporate the six areas Westmorland and Furness Council will prioritise emission reduction actions within the Council and across the area, including; housing, industry, energy generation, waste, transport and the management of our natural environment. Below, we will outline the principal data and our key climate actions identified for each of the six themes.

The Way We Live



Nationally, housing accounts for over 21% of the UK's total carbon emissions, with approximately 85% of UK homes connected to the gas network, three-quarters of these emissions come from heating systems (Energy Saving Trust, 2021). Retrofitting homes to improve their energy efficiency and use low carbon heating systems is a key challenge to achieving net zero. As the UK continues to aim for net zero emissions by 2050, there is a clear focus on heating efficiency, insulation, electric heating systems

(e.g. air source and ground source heat pumps, which will be supported by the government’s commitment to decarbonise grid electricity by 2035), and renewable electricity supply in new and existing buildings.

In addition to housing, agriculture and farming contribute to greenhouse gas emissions in the way we live. Globally, food systems account for over one third of greenhouse gas emissions and have become significantly more energy intensive over time. Department for environment, food and rural affairs (Defra) (2022) statistics show that in the UK, agriculture accounts for 69% of total nitrous oxide emissions, 48% of all methane emissions and 1.7% of carbon emissions. However, in the last 30 years, emissions associated with agriculture in the UK have reduced by around 16% as sustainable farming methods are adopted.

Locally in Westmorland and Furness, the most emissions associated with domestic and non-domestic buildings are released from fossil fuels in homes, as shown in Figure 8.

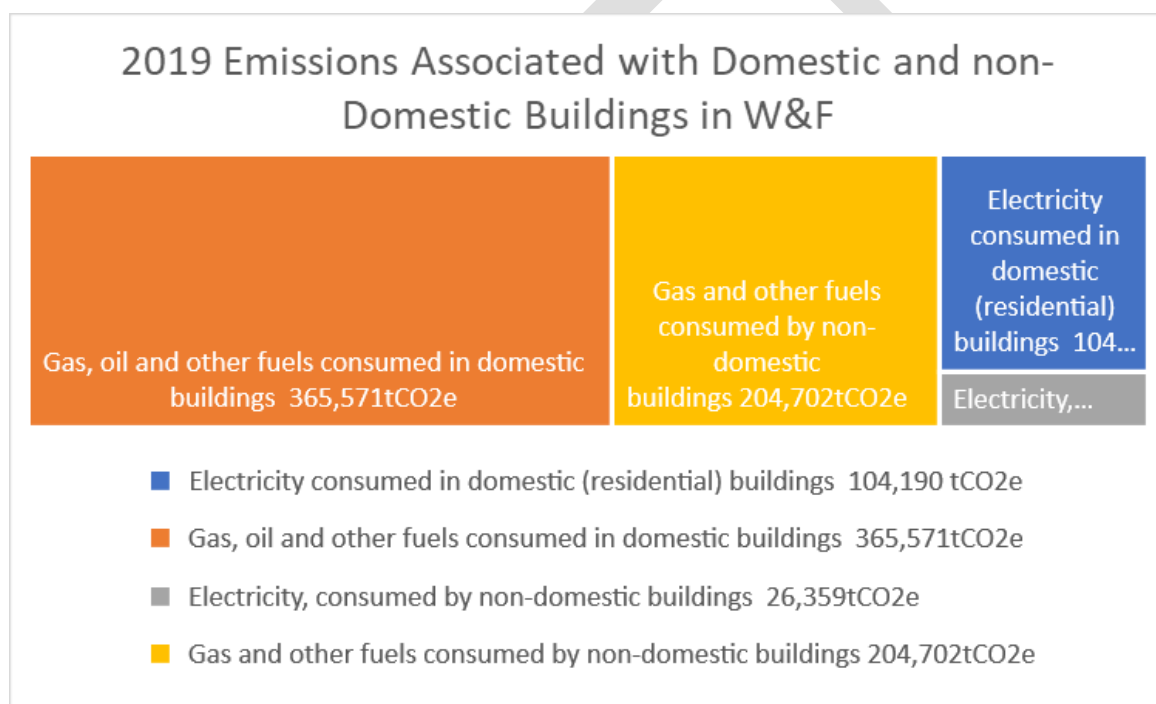


Figure 8 – emissions associated with domestic and non-domestic buildings in Westmorland and Furness (Appendix 2: Zero Carbon Cumbria – Summary of greenhouse gas emissions in Westmorland and Furness and trajectories to net zero, June 2023 – Small World Consulting on behalf of ZCCP).

Consequently, existing housing is a significant area of concern for Westmorland and Furness Council, due to the rising fuel poverty in the area and the associated emissions from our housing stock. While limited, the Council does have some powers regarding the Domestic Minimum Energy Efficiency Standard which sets a minimum energy efficiency level for domestic private rented properties. The Council will respond to government policies such as the future homes standard (2025), which should reduce emissions from housing development by 75%.

Additionally, the Council’s role in delivering emissions reduction from housing is focused on the national retrofit schemes, such as the Sustainable Warmth competition and the Housing Upgrade grant (HUG) schemes. Westmorland and Furness council has delivered £10 million worth of home retrofit work, retrofitting 1000 properties across the Council area. These schemes have identified the funding gap in delivering retrofit and that there is a skills gap in delivering retrofit locally. The Council will work with local education and training providers to address this skills gap and provide locally accredited training courses through PAS 2035.

Through planning, the Council can influence developers to ensure that future development occurs in line with our net zero target. The Council is developing a new local plan to help shape our developments to ensure we’re transitioning into a low carbon society. For example, the Local Plan focuses on accessible development with easy access to services by foot or cycle, reducing the need to travel and providing good Electric Vehicle (EV) connectivity.

Further to housing, locally, agriculture plays an important role in Westmorland and Furness’ economy and greenhouse gas emissions, along with hospitality and tourism (a key purchaser and consumer of food and drink in Westmorland and Furness). Decarbonising farming and the food and drink industry is a key challenge to achieving net zero by 2037, in Westmorland and Furness.

The Council is committed to working in partnership to reduce emissions from housing and agriculture, in the way we live. The Council will work with our farming community through its transition to the Environmental Land Management Scheme, working with partners on supporting more local growing through allotments and community orchards and supporting the tourism and hospitality sector through Cumbria’s destination management plan. The Council will also continue to work with partners to provide energy efficiency advice and support to residents. Through schemes such as Cold to Cosy and The Green Doctor both offering free advice to residents on how to reduce bills and keep their home warm.

Westmorland and Furness council worked with a consortium of partners including Cumbria Action for Sustainability and University of Cumbria on a Innovate UK net zero innovation project called Pathfinder Places. The £75k phase one feasibility study sets out project proposals around achieve net zero in a rural area including a food decarbonisation initiative called place to plate. The Council will be continuing this project into phase two in 2024.

A full list of actions that the Council is committing to for the next 5 years can be found in Appendix 3: Westmorland and Furness Council’s Climate Actions. Table 1 outlines the key actions we wanted to highlight for the way we live.

Council Team	Action	Cross Cutting Themes	Timescale
Planning Policy and Development Management	Embed Climate Change and the Net Zero 2037 target into the Westmorland and Furness Local Plan	All	In Progress

Housing	Develop a social housing decarbonisation plan for council-owned social housing stock and aim for an EPC C target date.	Health, Equality, Rurality	Long Term
Housing	Continue to bid and deliver national energy efficiency and retrofit schemes including Local Authority Delivery (LAD), Home Upgrade Grant Scheme (HUG) and Energy Company Obligation (ECO) to support homeowners in accessing accredited advice on house retrofitting and energy efficiency.	Health, Equality and Rurality	In progress
Cross-Departmental	Support new low-carbon development of the marina village in Barrow	Health and Green Growth	In progress
Housing	Continue to support the local energy advice partnership scheme Cold to Cosy through funding and referrals.	Health, Equality and Rurality	In progress

Table 1 – 5 key actions for the way we live. Appendix 3: Westmorland and Furness Council's Climate Actions contains all actions linked to the way we live.

The Way We Work



Emissions associated with the way we work include emissions from businesses, our industry, and emissions within council operation which we have direct control over. Nationally, almost 40% of businesses are reported to be taking at least one action to reduce their greenhouse gas emissions, with the most common action being switching to low emission lightbulbs (Office for National Statistics. 2021). Therefore, how we work in partnership with businesses, our Council supply chain and our communities is important to tackle the climate crisis.

Locally, in Westmorland and Furness, most emissions associated with businesses and industry are scope 3 emissions associated with upstream supply chains, as shown in Figure 9. The three scopes are defined in the glossary. Figure 10 show the breakdown

of Westmorland and Furness industry and business emissions, with a large proportion of industry emissions associated with our advanced manufacturing sector.

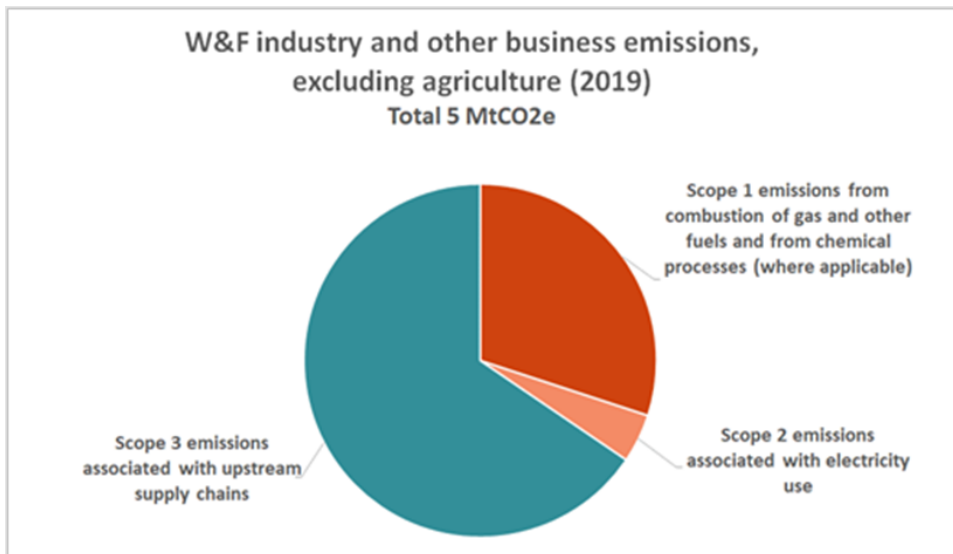


Figure 9 - Westmorland and Furness Scope 1, 2 and 3 carbon emissions related to industry and business.

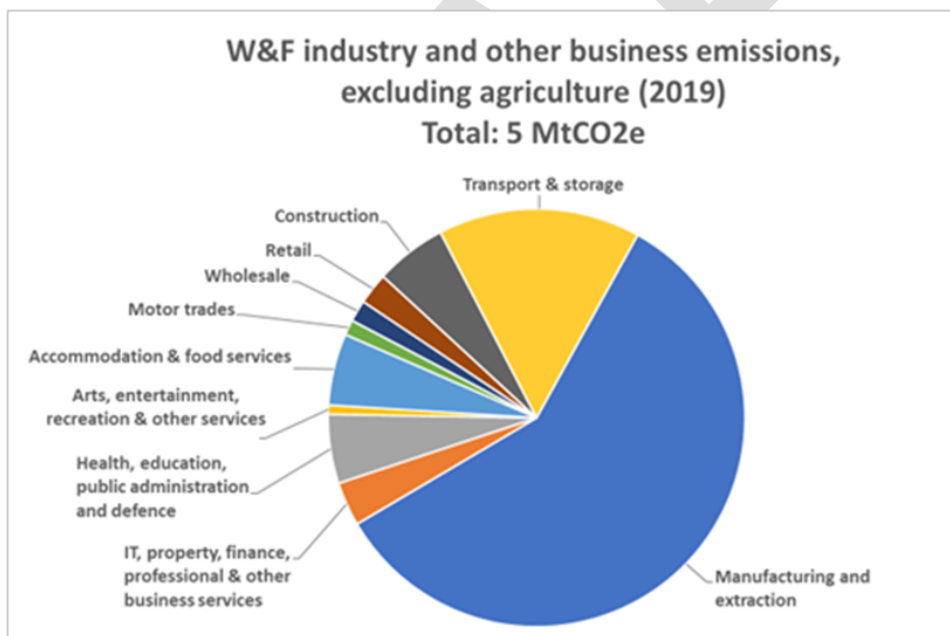


Figure 10 - Westmorland and Furness carbon emissions breakdown related to the industry and business sectors.

Within Westmorland and Furness Council, we are ambitiously aiming for climate change to be a golden thread that cuts across the whole council, to develop a climate-positive council culture. Our first step is for all staff members to undertake the mandatory Awareness to Climate Change e-learning module before rolling out carbon literacy training. Currently, over 75% of councillors and senior leaders have received carbon literacy training.

To reduce carbon emissions within council operation, Westmorland and Furness Council have commissioned a comprehensive Carbon Emission Baseline Study covering all the Council's assets and services. The study assessed the total greenhouse gas emissions generated by the Council's operations and services to provide measures to reduce these emissions.

The Carbon Emission Baseline Study will inform the Council's Carbon Management Strategy, which outlines emissions reduction measures to achieve net zero buildings, transport and supply chain emissions. The Carbon Management Strategy includes actions to achieve net zero Scope 1 and 2 by 2037 and net zero Scope 3 by 2050, at the latest.

The three categories of greenhouse gas scope emissions relevant to the council's own emissions are detailed in Table 2.

Category	Description
Scope 1	Direct GHG emissions from buildings, plant and vehicles owned or controlled by the Council e.g. natural gas used in boilers or fuel used by company owned vehicles
Scope 2	Indirect emissions associated with purchased energy consumed by the Council e.g. grid supplied electricity
Scope 3	All other indirect emissions that occur in the Council's supply chain e.g. business travel, purchased goods and maintenance contracts

Table 2: Definition of Council scope greenhouse gas emissions

The full Carbon Management Strategy [link to follow](#).

As shown in Figure 5, the commercial and industrial sectors are significant contributors to climate change. It is important we work together to drastically reduce commercial and industrial emissions, whilst making sure our diverse economy thrives. Westmorland and Furness Council will work in partnership to grow the green economy, to transition to net zero and increase the capacity and skills in key sectors such as sustainable farming, electric vehicles, domestic retrofit and renewable energy.

A full list of actions that the Council is committing to for the next 5 years can be found in Appendix 3: Westmorland and Furness Council's Climate Actions. Table 3 outlines the key actions we wanted to highlight for the way we work.

Council Team	Action	Cross Cutting Themes	Timescale
Capital Programmes	Implement the Carbon baseline strategy for decarbonising the Council Estate	Health and Green Growth	Long Term
Procurement	Develop the Procurement Strategy to include reference to Directorates informing and	All	Short Term

	influencing supply chain decarbonisation.		
Corporate Policy	Produce a Climate and Nature impact assessment tool which will be implemented for council projects, reports and key decisions.	Green Growth	In progress
Education	Work in partnership with schools to adapt the national low-carbon toolkit for schools and create a support offer for schools to reduce carbon emissions.	Green Growth, Health	Short Term
Green Growth	Encourage the creation of Green Jobs and support the provision of green skills training for existing jobs	Green Growth	Long Term

Table 3 – 5 key actions for the way we work. Appendix 3: Westmorland and Furness Council's Climate Actions contains all actions linked to the way we work.

The Way We Travel



Nationally, transport is the largest emitting sector of greenhouse gas emissions, producing 26% of the UK's total greenhouse gas emissions in 2021, with over 90% of emissions associated with road vehicles (Department for Transport, 2023). Whilst domestic transport emissions have decreased by 15% since 1990, compared to other sectors this has remained static. Therefore, the transport sector raises a real challenge for local authorities aiming for net zero emissions.

Locally, in Westmorland and Furness, transport accounts for over a quarter of our residents' carbon footprint, and over 75% of our visitor's carbon footprint. A breakdown of the total 339,630 tonnes of greenhouse gas emissions associated to the way we travel in Westmorland and Furness are shown in Figure 11.

Breakdown of initial priority area - travel

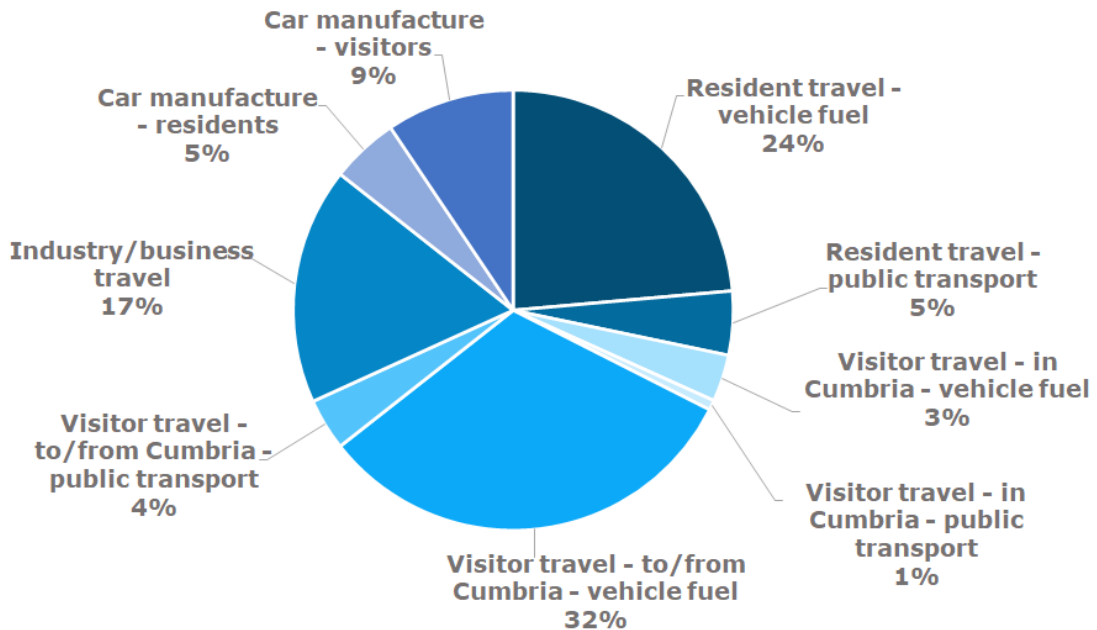


Figure 11 - Westmorland and Furness carbon emissions breakdown related to travel.

The Council has ambitious plans to get more people cycling, walking and wheeling in Westmorland and Furness, making active travel the natural choice for everyday short journeys. To encourage active travel, we have established a programme to identify, develop and secure funding to deliver high quality infrastructure improvements. A key component of this programme is the development of Local Cycling and Walking Infrastructure Plans (LCWIPs) which identify and prioritise future improvements to the local cycling and walking network over the next 15 years (2022- 2037). LCWIPs have been developed for Barrow-in-Furness, Kendal, and Penrith. In addition, the Council is committed to improving our footpaths to encourage more people to be active, committing £1 million for local sustainable transport schemes from the Council's Priority Investment Fund.

Further to prioritising active travel, reducing the emissions associated with private vehicles remains a concern for Westmorland and Furness Council. The introduction of 20mph speed limits and zones in the correct places in Westmorland and Furness has been identified as one of the new council's key priorities, to promote safer roads, reduce vehicle pollution and noise and enhance the environment for walking and cycling. The policy also states that, where appropriate, all new residential and urban roads will be designed and implemented as 20mph roads. With added traffic calming infrastructure, 20mph speed limits can make it safer for those participating in active travel such as cycling and walking, and therefore make active travel a more viable option to residents.

In addition to 20MPH zones, the uptake of EV ownership is on the rise, providing an important solution to reducing emissions associated with road vehicles. In quarter one of 2023 there were 2067 plug in vehicles registered in Westmorland and Furness, a 492% increase since 2019. To meet the growing demand for EV charge points,

Westmorland and Furness is committed to developing EV infrastructure. The Council are set to receive over £4.2million from the Local Electric Vehicle Infrastructure (LEVI) scheme, to install more off-street chargers in public car parks, but also delivering on-street EV chargers, for residents without driveway or garage access. For more information, see Westmorland and Furness EV Strategy Part 1.

Westmorland and Furness Council are working closely with key transport partners such as National Highways, Network Rail and our public transport operators with a shared ambition to reduce emissions through supporting mode shift, electrifying fleet and providing EV charging facilities.

A full list of actions that the Council is committing to for the next 5 years can be found in Appendix 3. Table 4 highlights key actions for the way we travel.

Council Team	Action	Cross Cutting Themes	Timescale
Highways	Deliver on £4.3 Million LEVI funding for EV infrastructure.	All	Short Term
Fleet	Develop a fleet decarbonisation strategy.	Health, Green Growth, Rurality	Short Term
Green Growth	Active travel investment around Westmorland and Furness, including town centres and rural areas.	All	Ongoing
Community Infrastructure	Ensure walkways, cycle lanes and bike storage to/at council buildings (such as leisure centres and libraries), parks and playing pitches are available, well-maintained and clear, to encourage active travel to leisure facilities.	Health	Ongoing
Highways and assets	Upgrade all streetlighting to LED and smart systems to reduce energy and for the benefit of dark skies.	Health, rurality, equality	In Progress

Table 4 – 5 key actions for the way we travel. Appendix 3: Westmorland and Furness Council's Climate Actions contains all actions linked to the way we work.

The Way We Use Things



Nationally, waste management is responsible for 18.7 million tons of CO₂e in the UK. In 2021, 70% of these emissions are related to landfills, and the primary greenhouse gas emitted is methane (Tiseo, 2023). Furthermore, the UK carbon emissions

	CO₂e
Emissions from other products bought and used by residents	204,905
Emissions from other products bought and used by visitors	54,138
Emissions associated other products	259,043

associated with the consumption of goods, services and importation was around 582 mtCO₂e in 2020 (Defra, 2023).

Locally, greenhouse gas emissions from waste management practices currently account for approximately 3% of Westmorland and Furness' carbon footprint. These are mainly attributed to household waste, which is incinerated through an energy from waste process.

Use of other consumer products which are bought and used by residents and visitors are summarised in Table 5.

Table 5 – emissions associated with consumer products in Westmorland and Furness.

While the emissions in Table 5 cover products in Westmorland and Furness, in 2022/2023 a total of 180,000 tonnes of residual waste were processed across Cumbria, in a joint contract with Cumberland Council. Of these 180,000 tonnes, 22.1% was recycled, 31.4% was recovered for energy generation and 15.2% was landfilled.

To reduce the carbon footprint of our waste activities in the Westmorland and Furness area, we will need to reduce how much waste we produce by keeping resources in use for as long as possible and prevent waste by re-using materials and products. The waste hierarchy (Figure 12) is a useful guide for reducing emissions, prioritising action further up the hierarchy. Westmorland and Furness Council is developing a waste strategy, which aims to achieve a 40% recycling rate.

WASTE HIERARCHY

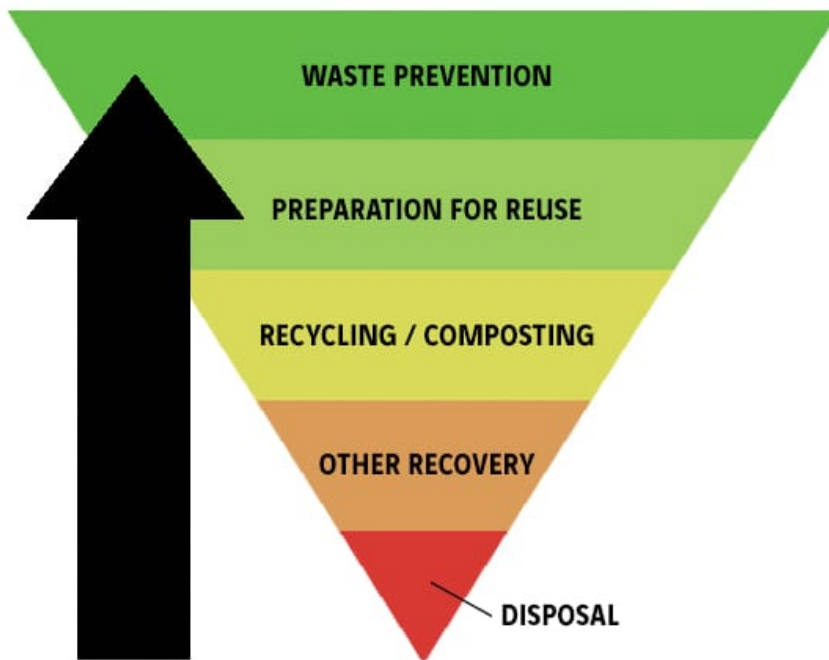


Figure 12 - Waste Hierarchy <https://www.letsrecycle.com/news/waste-hierarchy-challenges-and-opportunities/>

The Council will look to support becoming a circular economy (see Figure 13), to move away from the linear process of taking materials from the earth, making products out of them, and throwing them away. We want to create a more cyclical process where materials flow, with a focus on recovery or regeneration of resources, and the design of products that can be made and made again.

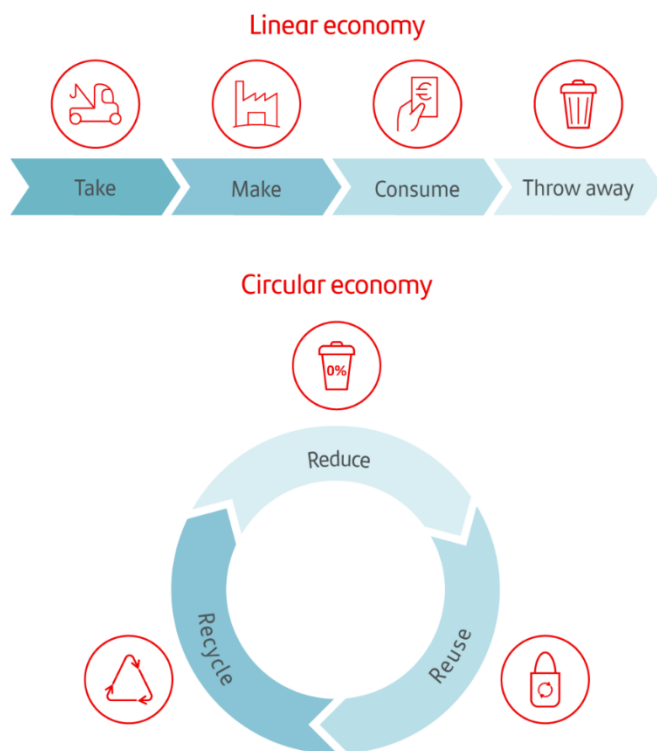


Figure 13 – Difference between Linear economy and Circular economy

The circular economy, shown in Figure 13, will require partnership action across all sectors of society, as the Council only has limited control over the full lifecycle of products and materials.

A full list of actions that the Council is committing to for the next 5 years can be found in Appendix 3. Table 6 highlights some of the key actions for the way we use things.

Council Team	Action	Cross Cutting Themes	Timescale
Waste	Develop an area-wide waste strategy to reduce waste and encourage reuse, with the aim of a 40% recycling rate in Westmorland and Furness.	All	Short Term
Waste	Optimise waste vehicle collection routes and trial EV / Hydrotreated Vegetable Oil (HVO) waste trucks in Westmorland and Furness	Health, Green Growth	Short term
Facilities	Monitor and actively work to reduce waste within council operations	N/A	Short Term

Waste/ Climate and Nature	Encourage a sharing economy within local communities, such as Repair Cafes, peer-to-peer networks and Library of Things.	Equality, Rurality	Ongoing
Green Growth	Incorporate improved public recycling and litter bins into council regeneration developments and Public Space Improvement Projects where appropriate	Green Growth, rurality, health	Ongoing

Table 6 – 5 key actions for the way we use things. Appendix 3: Westmorland and Furness Council’s Climate Actions contains all actions linked to the way we use things.

The way we produce energy



Nationally, in 2022, 82.2 MtCO₂e of carbon emissions were emitted in the UK from energy production. The carbon emissions associated with energy production are rising, increasing by 1.7% (1.4 MtCO₂e) compared to 2021 (Department for Energy Security and Net Zero, 2023). However, the UK has significantly switched from coal and natural gas to renewable energy. In 2022, coal only accounted for 2.4% of fuel used for electricity generation, compared to 65.5% in 1990.

Locally, the way we produce energy has traditionally been a large source of emissions, due to the use of coal, natural gas and other fossil fuels. However, considerable progress has been made in the UK to reduce emissions associated with the power sector, with over half of the UK’s total emission reduction since 1990 largely due to the phase out of coal and uptake of renewable energies. The sources of renewable energy in Cumbria are shown in Figure 14. This progress must continue, and the UK’s independent Committee on Climate Change has shown that the power sector can reduce emissions from 98 million tonnes of CO₂e in 2018 to only 3 million tonnes of CO₂e in 2050 through low carbon technologies and investment in renewable energy.

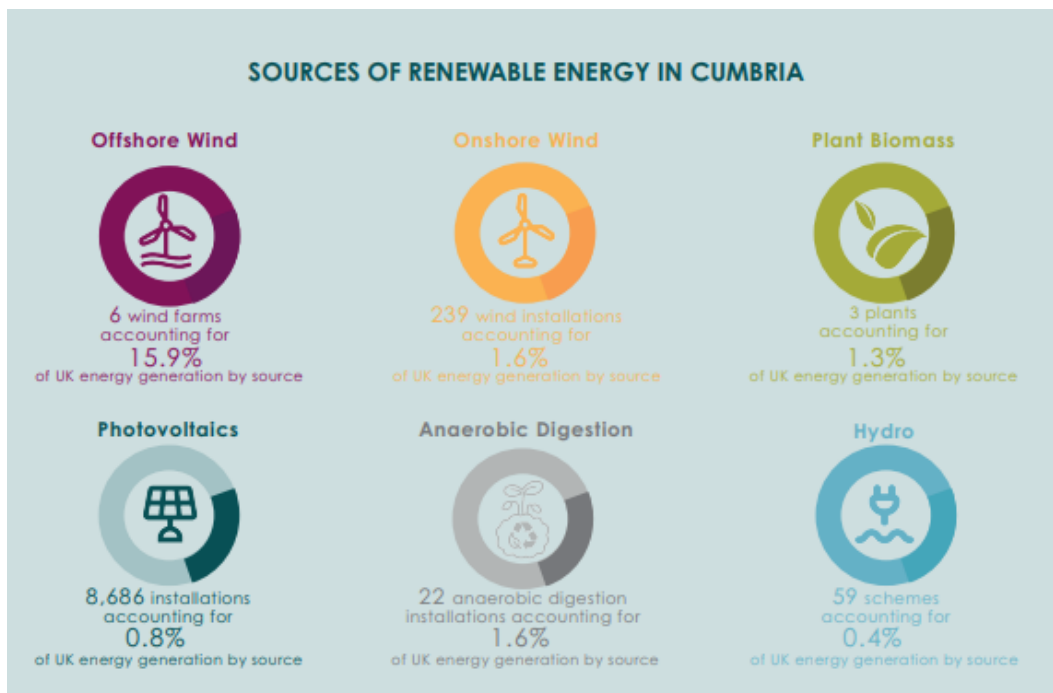


Figure 14 - Sources of renewable energy in Cumbria (Cumbria Local Enterprise Partnership's Clean Energy Strategy 2022).

Westmorland and Furness are positive contributors to renewable energy production in the UK. Offshore wind in the Furness peninsula account for 20% of the UK's installed wind capacity, including Walney Extension operated by Orsted which is one of the largest operational wind farms in the world, generating clean energy for nearly 600,000 homes. Locally Cumbria accounted for 4.3% of all installed UK capacity in 2020 (MW) and 5.6% of all UK electricity generation (GWh). Increasing the capacity of renewable energy locally will support the decarbonisation of buildings (The Way We Live), businesses (The Way we Work) and help encourage switching to Electric Vehicles (The Way We Travel).

Westmorland and Furness Council is committed, through its Council Plan, to supporting sustainable growth and empowered communities by working closely with partners such as the North-West Energy Hub, Electricity North-West, Cumbria Local Enterprise Partnership and the Zero Carbon Cumbria Partnership.

Our climate actions for the way we produce energy will be tailored towards an enabling and leadership by example role. We will develop policy to enact our vision, we will collaborate with others towards shared goals, and we will show leadership by example through developing our own renewable energy projects.

A full list of actions that the Council is committing to for the next 5 years can be found in Appendix 3: Westmorland and Furness Council's Climate Actions. Table 7 outlines the key actions we wanted to highlight for the way we produce energy.

Council Team	Action	Cross Cutting Themes	Timescale
Capital Programme Team	Actively engage with Electricity Northwest on grid issues; demand, peak, infrastructure and to explore opportunities to collaborate on low carbon technologies and grid innovation projects.	Green Growth	Ongoing
Capital Programme Team	Explore commercial opportunities to develop Council own energy.	Green Growth, Equity	Long Term
Capital Programme Team	Identify roof mounted solar opportunities on council buildings which would generate return on investment	Equality and Green Growth	Long Term
Planning Policy	Develop energy efficiency topic papers to help inform policy decisions through the development of the Local Plan	Direct Control	Short Term
Climate and Nature/ Green Growth	Work with partners to help the development of a Local Area Energy Plan	Green Growth	Long Term

Table 7 – 5 key actions for the way we produce energy. Appendix 3: Westmorland and Furness Council’s Climate Actions contains all actions linked to the way we produce energy.

The way we protect and enhance nature



Nationally, trees provide an important carbon store, storing over 200 million tonnes of carbon across the UK. Likewise, in the UK, the value of trees for flood protection is estimated to be £6.5million, and £6.1million for urban cooling (Woodland Trust. 2023). Further to trees, peatlands store twice as much carbon as all the world’s forests combined. In the UK, peatlands make up 12% of the UK’s land area and store over 3 billion tonnes of carbon (Wildfowl and Wetlands Trust. 2023). Therefore, nature has the potential to store carbon, alleviate flooding, improve air quality and boost health and wellbeing.

Nationally, nature-based solutions are being adopted. Nature-based solutions are measures to tackle climate change by not only minimising climatic impacts but also to increase our resilience, these include:

- Restoring our peatlands and increasing our woodland cover, both of which provide opportunities for carbon sequestration;
- Natural flood management, which can reduce the impact of rainfall events, as well as helping to deliver wide range of biodiversity and water quality benefits;
- Sensitive management of coastal habitats such as saltmarshes to assist in coastal defence measures; and
- Increasing the connectivity of biodiverse habitats allows for species to adapt to the impacts of climate change.

Locally, in Westmorland and Furness, urban tree canopy cover is below the target suggested by Forest Research, varying from 7.6% in Barrow-in-Furness to 14.2% in Penrith (Forest Research. 2021). Similarly, our peatland is generally in poor condition which will increase carbon emissions from our natural environment. For example, a 5% loss of UK peat soils would be equal to the entire annual man-made carbon emissions (Cumbria Wildlife Trust. 2023). Peatlands are degraded from unsustainable land management including overgrazing and burning. However, healthy peatlands are a large carbon store, create a species rich habitat, improve water quality and provide flood protection.

Westmorland and Furness Council is committed to tree planting and peatland restoration. Several tree planting projects have been undertaken and are being developed, including the Community Forest project in Barrow, planting with the Cumbria innovative Flood Resilience (CiFR) programme, and community orchards and micro woodlands proposed across the area. In addition, Westmorland and Furness Council is funding a land assessment to identify the potential to enhance nature on all council-owned land. This can also help identify if there are opportunities for carbon offsetting.

Further to enhancing the environment to sequester carbon and alleviate flooding, to reduce emissions associated with how Westmorland and Furness Council maintains green spaces, the Council is reviewing its land management and maintenance practices to support sustainable ground maintenance practices and reduce carbon emissions.

Much of the rural landscape is managed by farmers and private landowners but significant areas are also in the ownership of public bodies, including Ministry of Defence, United Utilities and the Forestry Commission, as well as conservation bodies including the National Trust. Nature based solutions will need to be based on catchment and habitat boundaries rather than ownership boundaries, therefore a strategic and partnership-based approach will be required to maximise the benefits that nature can provide when addressing the challenges, we face from climate change.

Therefore, Westmorland and Furness Council are working closely with the Cumbria Local Nature Partnership, the Rural Panel of Cumbria Local Enterprise Partnership and both of our National Parks, to try to coordinate a Cumbria approach to these

challenges. Through the development and implementation of the Nature and Biodiversity Action Plan and the Cumbria Local Nature Recovery Strategy, Westmorland and Furness Council, along with the Supporting Authorities (Cumberland Council, Natural England, Lake District National Park Authority, Yorkshire Dales National Park) and the Cumbria Local Nature Partnership, will focus on these local actions.

A full list of actions that the Council is committing to for the next 5 years can be found in Appendix 3. Table 8 outlines some key actions we wanted to highlight for the way we use things.

Council Team	Action	Cross Cutting Themes	Timescale
Climate and Nature	Produce a Local Nature Recovery Strategy, and work with partners to implement the strategy to generate investment in nature recovery, which could have carbon sequestration potential.	All	Short Term
Climate and Nature	Support partners in landscape scale upland peatland restoration projects that would benefit habitats recovery and carbon sequestration.	Rurality, Green Growth	In progress
Community Infrastructure	Assess council-led maintenance practices for parks, leisure pitches, cemeteries etc. to support sustainable grounds maintenance practices.	Health	Ongoing
Climate and Nature	Work with partners to encourage community growing and increased local food security.	Health, Equality and Rurality	Long Term
Arboriculture	Develop a tree strategy to support partners, residents and landowners with tree and hedgerow planting for improving natural flood management, air quality, carbon sequestration and enhancing habitats.	Health, Green Growth	Long Term

Table 8 – 5 key actions for the way we enhance nature. Appendix 3: Westmorland and Furness Council’s Climate Actions contains all actions linked to the way we enhance nature.

Engagement

In our Council Plan, we outline our commitment to engaging with our communities to develop plans and strategies. We aim to provide leadership to increase participation in local decision making within underrepresented communities. As a council, we are aware that Climate Change represents a shift in the role and responsibility of local government. With increasing powers, funding and guidance from national government to reach their net zero target, we must ensure we deliver on this transition, for you, our residents.

In preparation for this Climate Action Plan Part Two, we launched a period of informal public engagement, through a series of Climate Conversations and a dedicated workshop with local community groups. Over 200 residents across Westmorland and Furness attended the climate conversation events, including landowners, business owners and Parish Councillors. It became apparent we can all work together to raise awareness of climate change and undertake climate action in our locality. One resident said:

“It is positive to see that climate is front and centre [of the Council’s priorities].”

Insert photograph

The discussions helped inform this action plan by feeding into our actions (Appendix 3: Westmorland and Furness Council’s Climate Actions). The key topics identified across the five events and the workshop with community groups, and how these have informed our Council action are shown in Table 9 below:

Engagement Questions/Discussions	Climate Action from the table of Actions (Please see the Table of Actions for full explanation).
Work with Town and Parish Councils on climate action	Engage with Parish and Town Council’s to ensure joined up initiatives for decarbonisation. For example, developing a Climate Change Parish and Town Council toolkit.
Demand to prioritise active travel	Continue to seek funding to deliver Local Cycling and Walking Infrastructure Plans (LCWIP) and building our evidence base for projects and schemes. Active travel investments around Westmorland and Furness including town centres and rural areas
Integrate climate and nature into planning regulations	Embed climate change and the Net Zero 2037 target into the Westmorland and Furness Local Plan. Integrate sustainable building principles into a Westmorland and Furness design code supplementary planning document.

Decarbonise social housing	Develop a social housing decarbonisation plan for council-owned social housing stock and aim for all social housings to achieve an EPC C rating.
Hold more open forums, climate juries and smaller/more frequent conversation to engage with residents	The Council will engage with the Furness Borough and Kendal Town citizen juries. Ongoing engagement with the public and community groups on our climate action.
Request for more support in delivering sustainability hubs across the area	Explore options to support the development of sustainability hubs in Westmorland and Furness.

Table 9 – Community-led discussions from external engagement events and how these have informed our climate action

Following these Climate Conversations, the existing recommendations of the citizens juries in Furness and Kendal, as well as the need for climate action to achieve net zero by 2037, we are launching our Climate Action Plan Part Two now. However, we recognise that we will benefit from further public engagement and consultation in the future. This will be an iterative process, and we will continue to explore further methods of engaging with residents, communities and partners to develop a vision for climate action across Westmorland and Furness.

DRAFT

Get involved

Local level

Westmorland and Furness Council Locality Boards

Working with the three Locality Boards Furness, South Lakeland, Eden and their community development teams to regularly engage with elected members and communities to understand, influence and inform service delivery decision making and reflect community need.

Each Locality Board has developed its own Locality Plans setting out priorities based on local issues and opportunities – Climate change is a key theme running throughout. Locality Boards will influence the delivery of this strategy through their thematic working groups and workshops not only through influence but also driving forward action through local leadership.

Locality Boards bring together different interest groups from the public, private, town and parish councils and voluntary sectors to work in partnership. Community development teams are the conduit for consultation and engagement with communities and local place shaping activity.

Locality Boards continue to distribute funding and grants to support locality working, projects and activities. Locality Boards are able to maximise funding opportunities to bring added value to projects and schemes.

Town and Parish Council

Parish and Town Councils, the first tiers of local government, can have an important role in decreasing local carbon emissions and reduce the impact of climate change. [The Climate Change and Sustainable Energy Act 2006](#) enhances the UK's contribution to tackling climate change by giving Parish and Town Council's more power in relation to local energy savings and increasing small-scale production of heat and electricity from a low carbon source.

Westmorland and Furness is made up of 133 Parish and Town Councils. Parish and Town Councils can play an important role in addressing the climate and nature crises.

To help understand the sources of carbon emissions in our local area, the Centre for Sustainable Energy, working with the University of Exeter have produced a parish council carbon footprint tool: [Impact | Community carbon calculator \(impact-tool.org.uk\)](https://impact-tool.org.uk)

For more information about how Parish and Town Councils can act:

- [Ways to tackle Climate Change \(publishing.service.gov.uk\)](https://publishing.service.gov.uk)
- [20-actions-parish-and-town-councils-can-take-on-the-climate-and-nature-emergency.pdf \(huntingtonparishcouncil.gov.uk\)](https://huntingtonparishcouncil.gov.uk)

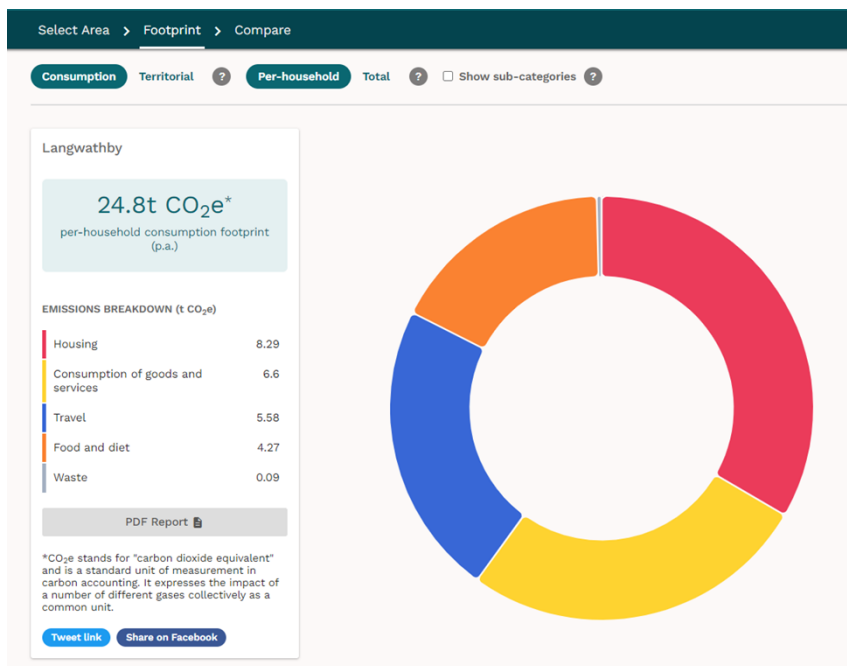


Figure 15: An example screenshot of a parish within Westmorland and Furness.

The Cumbria Association of Local Councils (CALC) is a membership organisation run by local councils for the benefit of local councils. Its objectives are to support a council's daily operations and to advocate on their behalf. This membership organisation is open to all Town and Parish Councils. For more information: [Cumbria Association of Local Councils : Welcome to CALC](#)

CALC has coordinated many useful tips and documents to help town and parish councils with climate action and biodiversity loss.

Want to know more and have your say?

- Sign up for our quarterly [Climate and Nature Newsletter here.](#)
- Engage with our key partners through the Zero Carbon Cumbria Partnership here: <https://zerocarboncumbria.co.uk/leading-change/zero-carbon-cumbria-partnership/>
- One of the key charities working to help communities to decarbonise is Cumbria Action for Sustainability, please check out their website for information that can help you and your community address climate change: <https://cafs.org.uk/>
- Another key partner of ours for restoring peatland and exploring other nature based solutions are the Cumbria Wildlife Trust <https://www.cumbriawildlifetrust.org.uk/>
- But we cannot do it alone and rely on many key community partners and encourage new communities to come together to help.
- We'd love to hear from you, what you are doing to help address climate change or any ideas you have that the Council could help with. Please email: climate@westmorlandandfurness.gov.uk

Next Steps:

Monitoring, Evaluation and Reporting

We will continually monitor and evaluate the progress of this action plan reviewing and refining it based on lessons learnt.

The plan is intended to be a live document and will develop as we continue to increase our understanding of emission sources and the most effective ways to reduce them, working closely with partners on this journey.

Progress Reporting

Performance monitoring on the action plan will take place each year to track progress against agreed actions and performance, with a summary document made publicly available. A full review of the action plan will take place within 5 years.

This plan will tie in with other key strategies and action plans across the council, including but not limited to:

Key Strategy	Date Due
EV Strategy Part 1	Link
EV Strategy Part 2	2024
Nature and Biodiversity Action Plan Part 1	2024
Nature and Biodiversity Action Plan Part 2	2024
Westmorland and Furness Carbon Management Strategy	2024
Local Nature Recovery Strategy	2024
Climate Adaptation Plan	2025

List of Appendices:

- Appendix 1: Climate Action Plan Part One
- Appendix 2: Zero Carbon Cumbria – Summary of greenhouse gas emissions in Westmorland and Furness and trajectories to net zero, June 2023 – Small World Consulting on behalf of ZCCP.
- Appendix 3: Westmorland and Furness Council's Climate Actions

Glossary

Adaptation

The process of adjustment to actual or expected climate and its effects. In human systems, adaptation seeks to moderate or avoid harm or exploit beneficial opportunities. In some natural systems, human intervention may enable adjustment to expected climate and its effects.

Atlantic Meridional Overturning Circulation (AMOC)

A large system of Atlantic Ocean currents, also known as the gulf stream, brings warm water northwards and provides the UK with its mild winters.

Anthropocene

The current geologic age, used to describe the most recent period in Earth's history when human activity started to have significant impact on the planet's climate and ecosystems.

Carbon Sequestration

The uptake of carbon dioxide (CO₂), in terrestrial or marine reservoirs. Biological sequestration includes direct removal of CO₂ from the atmosphere through land-use change (LUC), afforestation, reforestation, revegetation, carbon storage in landfills and practices that enhance soil carbon in agriculture (cropland management, grazing land management). It can also be used to refer to Carbon Dioxide Capture and Storage (CCS).

Climate Change

A change in the state of the climate that can be scientifically identified and that persists for an extended period, typically decades or longer. Climate change may be due to natural internal processes or external forcings such as modulations of the solar cycles, volcanic eruptions and persistent anthropogenic changes in the composition of the atmosphere or in land use.

Climate Crisis

This term acknowledges that we are in a state of crisis and need to take radical action to reduce carbon emissions.

Climate Impacts

Effects on natural and human systems from extreme weather and climate events and of climate change. Impacts generally refer to effects on lives, livelihoods, health, ecosystems, economies, societies, cultures, services and infrastructure due to the interaction of climate changes or hazardous climate events occurring within a specific time period and the vulnerability of an exposed society or system. Impacts are also referred to as consequences and outcomes. The impacts of climate change on geophysical systems, including floods, droughts and sea level rise, are a subset of impacts called physical impacts.

Co-benefits

The positive effects that a policy or measure aimed at one objective might have on other objectives. Co-benefits are often subject to uncertainty and depend on local circumstances and implementation practices, among other factors.

Emission Scopes

Scope 1	Emissions from the combustion of gas and other fuels and from chemical processes (where applicable)
Scope 2	Emissions from the use of electricity
Scope 3 (upstream only)	Emissions associated with the upstream supply chains of businesses in Cumbria, including the supply chains for fuels and electricity generation, as shown in Figure 4.

Greenhouse Gas Emissions

Greenhouse gases (GHGs) are gases in the earth's atmosphere that trap heat. The main emissions are water vapor (H₂O), carbon dioxide (CO₂), methane (CH₄), nitrous oxide (N₂O), hydrofluorocarbons (HFCs), perfluorocarbons (PFCs) and sulfur hexafluoride (SF₆). We calculate emissions in terms of carbon due to the abundance of it and the length of time it stays in the atmosphere, and other greenhouse gases are usually counted in CO₂ equivalents. One CO₂e is the amount of heat an equal amount of CO₂ would be expected to trap over the next 100 years.

Global Warming

The gradual increase observed or projected, in global surface temperature, as one of the consequences of radiative forcing caused by anthropogenic emissions.

Health Equity

The ambition and process to ensure everyone has the opportunity and accessibility to achieve optimal health by challenging the factors that prevent some members of our communities from attaining their best health, such as lack of resources.

Mitigation

A human intervention to reduce the sources or enhance the sinks of greenhouse gases. Human interventions can also reduce the sources of other substances which may contribute directly or indirectly to limiting climate change.

Net Zero

Net Zero for Westmorland and Furness means reducing greenhouse gas emissions as far as possible to achieve a balance between anthropogenic emissions and physical carbon removals in the region. This removal may occur through natural sequestration by nature restoration or using technology such as Carbon Dioxide Capture and Storage (CCS).

Resilience

The capacity of social, economic and ecosystems to cope with a hazardous event or trend or disturbance. Building climate resilience requires mitigation and adaptation

actions that must be combined to tackle the current and future impacts of climate change.

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Figure 15: An example screenshot of a parish within Westmorland and Furness from the impact-tool.

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Category	Team	Action	Timescale	Scope of Influence	Cross Cutting
The way we produce energy	Capital Programme Team	Develop a residual emissions strategy	Short Term	Direct Control	Green Growth
The way we produce energy	Capital Programme team	Explore commercial opportunities to develop Council own energy.	Long Term	Direct Control	Equality, Green Growth
The way we produce energy	Capital Programme team	Explore opportunities for council-owned Wind energy.	Short Term	Direct Control	Green Growth
The way we produce energy	Capital Programme team	Identify roof mounted solar opportunities on council property which would generate return on investment	In progress	Direct Control	Green Growth
The way we produce energy	Development Management	Develop planning guidance for residents on how to install solar panels.	In Progress	Direct Control, Partnership	Green Growth
The way we produce energy	Capital Programme team	Actively engage with Electricity North West on grid issues; demand, peak, infrastructure and to explore opportunities to collaborate on low carbon technologies and grid innovation projects.	Ongoing	Place shaping and partnerships	Green Growth
The way we produce energy	Green Growth	To have discussions to determine the council's approach to alternative energy sources including nuclear	Ongoing	Place Shaping	Green Growth
The way we produce energy	Planning Policy	Promote opportunities for renewable energy through the Local Plan (Solar, Wind, hydro, etc.	In Progress	Place shaping	Green Growth, rurality
The way we produce energy	Climate and Nature/ Economic Development	Work with partners to help the development of a Local Area Energy Plan	Long Term	Partnership	Green Growth
The way we produce energy	Climate and Nature	Work with partners to explore options for heat networks	Long Term	Partnership	Green Growth

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The way we produce energy	Climate and Nature	Influence Electricity North West on grid issue, demand, peak, infrastructure and to explore opportunities to collaborate on low carbon technologies and grid innovation projects.	Short Term	Partnership	Place Shaping Partnership
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Full Equality Impact Assessment (EqIA) Proforma

An EqIA is a tool to assess whether a decision, policy, service or function pays 'due regard' to the Public Sector Equality Duty, which requires public bodies to:

- Eliminate discrimination
- Advance equality of opportunity
- Foster good relations

The Equality Duty covers the following 9 **protected characteristics**:

Age, disability, gender reassignment, pregnancy and maternity, race, religion and belief, sex, sexual orientation, marriage and civil partnership. In addition, this EqIA process includes **care experience, rurality, socio-economic status and armed forces personnel/veterans.**

The EqIA process has two stages:

- **Screening EqIA:** This checks whether a decision, policy, service or function pays due regard to the Equality Duty; to provide any high-level advice or take immediate action; to determine if further analysis is needed through an EqIA.
- **Full EqIA:** Sometimes called Equality Analysis, this looks at a decision, policy, service or function in terms of data and information, research and evidence from consultation/engagement on all nine protected characteristics and rurality and socio-economic status. A full EqIA includes an action plan.

Where an EqIA relates to the Council Member Decision it should be included as an appendix to the report.

Section 1: About the Decision, Policy, Service or Function

Name of Decision/Policy/Service/Function being assessed	Climate Change Action Plan Part 2
Job Title of Officer completing EIA	Interim Senior Service Lead for Climate and Nature
Department/service area	Climate and Nature Team
Telephone number and email contact	Hannah.girvan@westmorlandandfurness.gov.uk
Date of Assessment	30/11/2023
Objectives of decision/policy/service/function	The Part Two action plan has been developed by the Climate and Nature team, working in conjunction with departments across the council, to identify suitable actions to reduce emissions, reduce environmental inequalities and create a climate positive council culture, building on the council's 'ecologically aware' value.
Key stakeholders and consultees	Climate and Natural Environment Team All Directorates

Section 2: Information Gathering

Consider the sources of **relevant** information, evidence, data and research that will help you build up a picture of the likely impacts of your decision/policy/service/function on the protected characteristic groups.

Information Source	Location of data/information (give a link here if applicable)	What does the data/information tell us?
<i>Add rows as necessary</i>		

Section 3: Assessment of Impact

From the information, evidence, data and research you have gathered, use this section to identify the risks and benefits for each of the different protected characteristic groups.

Equality group	Positive (tick)	Adverse (tick)	Neutral (tick)	What is the impact?	Mitigating actions proposed (to address adverse impact)
Age	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	
Disability	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	
Sex	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	
Gender reassignment	Y			None	
Marital and civil partnership status			Y	None	
Pregnancy and maternity	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	
Race	Y			Positive, as working to reduce the impacts of climate change and improve	

Equality group	Positive (tick)	Adverse (tick)	Neutral (tick)	What is the impact?	Mitigating actions proposed (to address adverse impact)
				air quality in W&F has health and well-being benefits to all.	
Religion and/or belief			Y	None	
Sexual orientation			Y	None	
Care Experience	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	
People in rural areas	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	
Socio-economic status	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	
Armed Forces Personnel/Vetrans	Y			Positive, as working to reduce the impacts of climate change and improve air quality in W&F has health and well-being benefits to all.	

Section 4: Action Planning

What is the negative/ adverse impact or area for further action?	Actions proposed to reduce/ eliminate the negative impact	Who will lead on the action(s)?	Resource implications/ resources required	When? (target completion date)	Monitoring Arrangements
None					

Section 5. Outcome of Equality Impact Assessment (tick appropriate box)

No major change needed - the analysis shows the policy is robust and evidence shows no potential for discrimination

Adjust the policy/service/function - alternatives have been considered and steps taken to remove barriers or to better advance equality. Complete the action plan.

Adverse impact(s) identified but continue - this will need a justification or reason. Complete the action plan.

Y

Section 6. Review

Date of the next review of the Equality Impact Assessment	31/03/2025, when the Climate Action Plan Part 2 is reviewed annually.
Who will carry out this review?	Climate and Nature team

Glossary: Definitions of Protected Characteristics

Age: This refers to a person having a particular age or being within an age group.

Disability: A person has a disability if s/he has a physical or mental impairment which has a substantial and long-term adverse effect on their ability to carry out normal day-to-day activities. Includes: Physical/sensory disability; Mental Health; Learning disability.

Sex: This refers to a person being either male or female.

Gender reassignment: This is the process of transitioning from one sex to another, considered a personal process rather than a medical one and it does not require someone to undergo medical treatment in order to be protected.

Marital and civil partnership: Legal recognition of a same-sex couple's relationship. Civil partners must be treated the same as married couples on a range of legal matters.

Maternity: The period after giving birth. It is linked to maternity leave in the employment context. In the non-work context, protection against maternity discrimination is for 26 weeks after giving birth, including as a result of breastfeeding.

Race: It refers to a group of people defined by their colour, nationality (including citizenship), ethnic or national origins. Includes, Asian, Black and White minority ethnic groups inc. Eastern Europeans, Irish people and Gypsy Travellers.

Religion or belief: "Religion" means any religion, including a reference to a lack of religion. "Belief" includes religious and philosophical beliefs including lack of belief (for example, Atheism). The category includes, Christianity, Islam, Judaism, Hinduism, Buddhism, and non-religious beliefs such as Humanism.

Sexual orientation: This is whether a person's sexual attraction is towards their own sex, the opposite sex or to both sexes.

Transgender: Anyone whose gender identity is neither male nor female as legally defined at birth, and is not undergoing a process of gender resignation.

Rurality: Differential impact on people in rural areas

Socio-economic status: Differential impact on people due to household or personal income.

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WESTMORLAND AND FURNESS COUNCIL

Cabinet

Report Title	Proposal to Expand Beaconside Church of England Primary School
Date of Meeting	23 January 2024
Report Author	Amy Holliman, Assistant Director, Quality, Resources and Transformation
Director	Milorad Vasic, Director of Children’s Services
Lead Cabinet Member	Councillor Sue Sanderson, Cabinet Member for Children’s Services, Education and Skills.
Why is this a key decision?	<p>1. an executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council’s budget for the service or function to which the decision relates NO</p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are “significant” if they are equal to or greater than £500,000. YES</p> <p>For clarification, no treasury management decision shall constitute a Key Decision</p>
Wards Affected	Penrith North and Penrith South
Identify exempt information and exemption category	Not applicable
Reasons for urgency (<u>only</u> where applicable)	Not applicable
Appendices (if any)	<p>Appendix 1: Consultation document and consultation slides</p> <p>Appendix 2: Statutory Proposal</p> <p>Appendix 3: Statutory Notice</p> <p>Appendix 4: Equality Impact Assessment</p>

1. Executive Summary

1.1 Westmorland and Furness Council (‘the Council’) is in receipt of Section 106 funding from several housing developments that have been constructed in the Penrith area. This funding has to be used to support the creation of additional primary school places and can be delivered by making improvements or extensions to existing schools in Penrith. Discussions around the most effective way to utilise these s106 funding contributions have been ongoing for a number of years, pre-dating the creation of Westmorland and Furness Council.

- 1.2 Between 3 October 2023 and 31 October 2023, the Council consulted on a proposal to expand Beaconside Church of England Primary School ('Beaconside') in Penrith, both in terms of facilitating an increase of mainstream places and increasing the resource provision available at the school.
- 1.3 This report sets out the background and rationale for the proposal, outlines the consultation process and details the feedback that was received by the Council in response to the consultation exercise.
- 1.4 Cabinet approval is sought in accordance with the recommendations as set out in Section 2 below. The reasons for the recommendations are outlined in the report.

2. Recommendations

For the reasons set out in this report, Cabinet is recommended to:

- 2.1 Note the feedback that was received in response to the consultation on the proposal to expand the Beaconside School Building to facilitate a phased increase in the published admission number from 73 to 90 over time.
- 2.2 Approve the publication of a statutory notice setting out the Council's intention to establish key stage two resource provision at Beaconside, creating 14 new places designated for children with physical or medical needs as set out in their Education, Health and Care Plans from 1 September 2026.

3. Background

- 3.1 Under s.106 of the Town and Country Planning Act, 1990, contributions can be sought from developers towards the costs of providing community and social infrastructure. The Council is in receipt of s.106 contributions arising from several housing developments in the Penrith area to support the provision of additional primary school places in Penrith.
- 3.2 The funding relating to housing developments in Penrith that the Council is in receipt of (via seven s106 agreements) totals £3,540,012. This includes £1,979,303 which must be committed by the end of March 2024. The remaining allocations have expiry dates ranging from 2026 – 2033. The different s106 agreements specify how the funding can be used, all relating to the creation of additional primary school places.
- 3.3 It is important to note that over the course of developing the proposal and the consultation period, the total amount available has been clarified and is more than original anticipated (previously understood that the total was £2.67m) due to the contributions being index linked plus additional contributions being available.
- 3.4 The profiled allocation provisionally allocated through the Capital Programme to this project aligned with the indicative costing (including contingency) is £2.67m. The remaining funding (£0.87m) will be the subject of further review and consideration regarding any future developments in Penrith schools that would meet the s106 requirements.

- 3.5 Discussions about the most effective way to utilise these s106 funding contributions have been ongoing for several years, pre-dating the creation of Westmorland and Furness Council. Given the need to secure allocation of the largest sum of contribution before the end of March 2024, the Council has taken the decision to consult on a proposal to both facilitate an increase the number of mainstream primary places and create key stage two resource provision at Beaconside as a means of ensuring that this funding is used for the benefit of children and families in Penrith.
- 3.6 While originally there was some expectation the housing developments would result in a new school being created; the funding contributions are not sufficient to fund a new school build (the cost of a new primary school is a minimum of £7m) nor has the original estimate of need for pupil places materialised to justify a new school.
- 3.7 Beaconside currently has a published admission number (PAN) of 73, and a capacity for 511 children in total. The addition of new classrooms and internal remodelling would allow for a phased increase of the school's published admission number up to a maximum of 90, increasing the overall capacity of the school to a maximum of 630 over time. The proposed development will also enable the creation of 14 new key stage 2 resourced provision places, increasing the number of resourced provision places at the school from 10 to 24. The proposed increase to the school's capacity is inclusive of the new key stage 2 resource provision.
- 3.8 It is important to note that the proposed expansion of Beaconside does not meet the 25% increase threshold necessary to trigger a statutory school organisation consultation in accordance with relevant statutory guidance. However, for completeness, and to adhere to the usual principles of public law this element of the proposal was consulted upon alongside the proposal to establish new key stage 2 resource provision at Beaconside, which is subject to the statutory school organisation consultation process.
- 3.9 The Council's consultation on this proposal ran from 3 October 2023 until 31 October 2023 and was undertaken following approval by Director of Children's Services, Milorad Vasic, and Cllr Sue Sanderson, Lead Cabinet Member for Children's Services, Education and Skills.
- 3.10 The details of the proposal are as follows:
- To expand Beaconside by the provision of additional classrooms and a programme of capital works to address accessibility and suitability issues arising from the configuration of the current building.
 - To establish 14 key stage 2 resource provision places, increasing the number of resource provision places at the school to 24.
 - To provide additional capacity in the school to allow for a phased increase of the school's published admission number as need arises from 73 to 90, increasing the overall capacity of the school from 511 to 630.

Rationale for Proposal

3.11 Creation of Additional Resource Provision

- 3.11.1 Currently primary phase resource provision in Penrith is split between Beaconside and North Lakes and requires pupils to transfer schools between KS1 and KS2. The creation of a new Key Stage 2 resource provision at Beaconside will allow children attending the Key Stage 1 provision the opportunity to continue their primary education at Beaconside and stay with their peer group without the need for transition to another school.
- 3.11.2 It is important to note that this proposal relates only to Beaconside and is not proposing any amendments to the existing resource provision at North Lakes Primary School.
- 3.11.3 The Council is clear there is a pressing need for additional resource provision places and this will be of considerable benefit to the local area.

3.12 Increasing Mainstream Capacity

- 3.12.1 This proposal is intended to ensure that the town has sufficient school places for local children. A proportion of the parents of children who live in Penrith choose to travel to attend rural schools in the locality. If the pattern for school choice of parents was not to flow outwards from Penrith but to reverse and stay within Penrith, then Penrith would have had a deficit of places within a 'reasonable distance of a child's home' at primary school level.
- 3.12.2 Beaconside is projected to be close to PAN for the 2025/26 Reception intake and above PAN for the 2026/27 Reception intake. (For 2025/26, the school is predicted to have an intake of 71 pupils, and for 2026/27, the school is predicted to enrol 75 children).
- 3.12.3 Beaconside has frequently accepted a higher Reception intake than was projected using Office of National Statistic (ONS) birth data.
- 3.12.4 There is evidence of in year admissions increasing the school's number on roll. This could in part be attributed to the housing developments beginning to yield pupils.
- 3.12.5 Beaconside is the closest school to most of the new housing developments in Penrith and has a site with significant open space that is amenable to expansion. This concentration of the housing developments means that Beaconside is most likely to be the preferred destination for new families.

3.13 Quality of Provision

- 3.13.1 It is the expectation of the Department for Education that local authorities should consider a range of performance indicators and financial data before deciding whether or not a school should be expanded in accordance with the statutory school organisation process. Whilst, recognising that this proposed expansion of mainstream places does not meet the 25% threshold for the statutory school organisation proposals, the Council has noted this and considers it good practice to take account of these requirements.

3.13.2 The quality of education provision at Beaconside is currently rated by Ofsted as good.

3.13.3 Beaconside is in a financially sustainable position and if the proposal is approved the school's leadership have capacity to work with the Council to implement the proposal. The Governing Body and the Council will work together to ensure that the mainstream expansion and the establishment of the resourced provision is phased in appropriately.

4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)

4.1 The proposal supports the Council Plan priority 'People' contributing to:

- Supporting active, healthy, happy lives for the young and old and being ambitious for all our children and young people
- Supporting people in need and reducing inequality, working closely with all schools to ensure that young people have opportunities to access the best education.

4.2 The Council Plan is supported by the Delivery Plan Framework which sets out the key projects the Council plans to carry out during the year and what it aims to achieve. This proposal is aligned to our delivery of aspects relating the strategic delivery theme of Learning – and ensuring that everyone has access to high quality education, where children, young people and adults are equipped with relevant tools, skills and aspirations to pursue the life they want to live and to access.

5. Consultation Process and Outcomes

5.1 It is only the resource provision increase element of the proposal that requires statutory consultation (the mainstream element not meeting the 25% increase threshold), a view was taken, however, that it was good practice to consult with stakeholders regarding both the resource provision and the proposed phased capacity increase in the pre-statutory consultation phase.

5.2 The consultation process was comprised of the following elements:

- Consultation meetings held at Beaconside School on 16 October 2023, for staff, governors, parents of students at Beaconside and the wider local community.
- An online questionnaire.
- Opportunity for respondents to email or send their views and comments via post.

5.3. The online consultation process received 175 responses from a variety of stakeholders including: governors, staff, parents and carers, (both from Beaconside and neighbouring schools) and other local residents.

5.4 The online consultation outcomes can be summarised as follows:

- 12% of all responses were positive about the proposal for Beaconside CE Primary School.
- 39% expressed concerns about how the proposal may adversely affect neighbouring local schools.
- 18% of respondents raised concerns about the practical issues that an expansion may produce i.e. traffic growth, parking problems.
- 26% of the responses could be categorised as requesting a new school be constructed.
- 9% of respondents expressed concern that the enlargement of the school may cause a reduction in the quality of the education on offer.

5.5 Issues arising from the public consultation can be summarised as follows:

- The diocese, staff and governing body of Beaconside are supportive of the proposal.
- There is largely support across all stakeholders for the additional resource provision being created at Beaconside.
- Two neighbouring primary schools in Penrith and their governing bodies are unhappy about the the funding being allocated to one school and not distributed equitably across schools in the area. They have expressed concerns regarding the impact increasing the places at one school may have upon the other schools. Representation was also made that the proposal going forward for consultation should have been agreed between all the schools.
- Some residents of Penrith including the Town Council representatives, are unhappy that a new school is not being built in Penrith. Seeking clarity regarding the future of the resource provision at North Lakes.
- Seeking to ensure any impact on secondary provision is considered.
- Expressing a positive view regarding utilising the funding for the local area.

5.6 Eden Locality Board considered the proposal as part of the consultation. The Board were supportive of the proposal, particularly the element relating to resource provision.

5.7 While mindful of the strength of feeling generated by the proposal and noting the comments received as part of the consultation, as a local authority we are confident there would be no detriment to neighbouring schools and progressing with this proposal would not only be in the best interests of children and young people in the area but also provides most benefit from the use of funding available.

6. Alternative Options for Consideration

- 6.1 The alternative options are detailed below for Cabinet Consideration:
- 6.1.1 Not to progress any proposal to utilise the funding. If the Local Authority does not commit £1,979,303 of the available funding by 24 April 2024, then this funding will need to be returned to the relevant developers. This option would not be to the benefit of children and families in the local area.
- 6.1.2 Building a new Primary School in Penrith. The available funding is not sufficient for a new primary school leaving a multi-million pound funding gap. A review of pupil number projections does not demonstrate the need for a new school
- 6.1.3 Expansion of other schools in the town. The Beaconside site has a number of key advantages, such as, being the nearest school to the developments generating the s106 funding, the size and configuration of the site is most suitable to the proposed alterations, and it is possible to create much needed new additional resourced provision places. Remaining s106 funds will be considered as part of any business case to support other schools in Penrith.

7. Financial Implications and risk

- 7.1 There are no direct financial implications arising from the recommendations in the paper. Following publication of the statutory notice and if the proposed expansion is agreed the cost of the project would need to be confined to the available s106 funding.
- 7.2 Mainstream maintained schools are funded through the Dedicated Schools Block (DSB) Schools Block. Funding is allocated to schools on the basis of the National Funding Formula which uses pupil numbers from the October census each year. The allocation of funding to the Local Authority to pass on to schools is also based on the October pupil census data. Whilst the increase in PAN will increase the budget share for Beaconside Primary School it will not affect the distribution methodology of school budget shares and therefore will not impact other schools. Revenue costs associated with the school's running costs are funded from its budget share.
- 7.3. Resource Provision (RP) places are also funded from the Schools Block but with an additional £6,000 per place funded from the High Needs block. This funding will be allocated to the school to support those pupils in the RP provision.
- 7.4 There may be reduced pressure on the High Needs block and Home to School transport budgets as a result of increased RP at Beaconside Primary as some pupils would attend a local mainstream school rather than a special or independent special school.
- 7.5 The capital cost of works associated with expanding and remodelling Beaconside Primary will be funded from s106 contributions that have been received over a number of years with a total of £2.67m included in the council's capital programme. The s106 funding is time limited in that it must be committed within a number of years of having been received or must be

returned to the relevant developer. Of the £2.67m included within the capital programme, £1.979m must be committed by the end of March 2024. Further s106 contributions totalling £0.870m relating to developments in Penrith have subsequently been received and as yet have not been committed and these would support any recommendations arising from sufficiency review of schools and SEND provision in the area.

8. Legal and Governance Implications

- 8.1 The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013, as expanded upon by the statutory guidance 'Making significant changes ('prescribed alterations') to maintained schools – January 2023' set out when the statutory process needs to be followed and what that process is.
- 8.2 The establishment of new resourced provision is a prescribed alteration to which the statutory process applies.
- 8.3 A proposed enlargement of Beaconside would only trigger the statutory process if the enlargement is permanent (longer than 3 years) and would increase the capacity of the school by more than 30 pupils; and 25% or 200 pupils (whichever is the lesser). As this report explains, this threshold has not been crossed.
- 8.4 Even when the statutory process does not apply there is still an expectation to follow public law principles and carry out robust consultation.
- 8.5 The consultation carried out in October 2023 did not form part of the statutory process. Although there is no longer a statutory 'pre-publication' consultation period for prescribed alterations, there is a strong expectation that local authorities will consult interested parties in developing their proposal prior to publication, to take into account all relevant considerations.
- 8.6 When considering the consultation responses (recommendation 2.1), Cabinet should not only take account of the number of people expressing a particular view but should give the greatest weight to responses from those stakeholders likely to be most directly affected by a proposal. Cabinet should give clear reasons for its decision.
- 8.7 Cabinet is being asked to approve the publication of the statutory notice/proposal in respect of the establishment of key stage 2 resourced provision for children with physical and medical needs (recommendation 2.2). The publication of the notice/proposal triggers a statutory representation period that must last 4 weeks.
- 8.8 A statutory proposal must contain sufficient information for interested parties to make a decision on whether to support or challenge the proposed change. As a minimum this should include-
 - school and local authority details;
 - description of alteration and evidence of demand;

- objectives (including how the proposal would increase educational standards and parental choice);
- the effect on other educational institutions within the area;
- project costs and indication of how these will be met, including how long term value for money will be achieved;
- implementation plan; and
- a statement explaining the procedure for responses: support; objections and comments.

- 8.9 The publication of the notice/proposal is the first stage of the statutory process, and Cabinet is not (at this stage) being asked to decide whether to approve the project at Beaconside. However, Cabinet should note some key considerations in respect of that decision, so as to make an informed decision, as to whether to publish the formal notice/proposal.
- 8.10 The Council is under a general duty to ensure that there is a sufficiency of school places in their area (section 14 Education Act 1996). All children are entitled to an efficient, full-time education which is suitable to their age, ability, aptitude and any special educational needs they may have
- 8.11 Section 9 of the Education Act 1996 states that children should be educated in accordance with the wishes of their parents, so far as that is compatible with the provision of efficient instruction and training and the avoidance of unreasonable public expenditure.
- 8.12 This report refers to the increase in the Published Admission Number ('PAN') at Beaconside. Beaconside is a Voluntary Aided School and as such the Governing Body (not the Council) is responsible for determining the school's admissions policy (including the PAN). The Governing Body are not required to consult on their PAN where they propose to increase it, although they must notify the Council.
- 8.13 As explained in this report, the section 106 payments earmarked for this potential project are time limited and have specific conditions of use attached.
- 8.14 The local authority has the power to issue the notice in respect of the establishment of key stage 2 resourced provision at Beaconside (Regulation 5(4) of the School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013) and Cabinet has the power to make this decision on behalf of the local authority as per Part 2 – Section 4: Responsibility for Executive Functions paragraph 1.1 of the Constitution and confirmed in Part 2 – Section 6: Officer Scheme of Delegation paragraph 3.18.

9. Human Resources Implications

- 9.1 There are no Human Resource implications for the Local Authority arising from this proposal as Beaconside Primary School is a voluntary aided school. Given this, any additional staff that may be need to employed by the school in

order to facilitate this expansion proposal will be employed directly by the school.

10. Equality and Diversity Implications (including the public sector equality duty)

- 10.1 The Equality Impact Assessment has been reviewed and updated in response to the outcome of the consultation process. A copy is attached at Appendix D.

Environment & Climate Change/ Net Zero

- 10.2 The scheme will be managed in line with upholding the Council's commitments to climate change and sustainability, this will be specifically built into specifications, which will include protection of the green space on the school site.

Social Care & Corporate Parenting Implications

- 10.3 The proposal will benefit children and young people through the additional resource provision at Beaconside and ensuring sufficient places are available locally.

Public Health Implications

- 10.4 The public health benefits are as follows: The provision of additional primary school places within Penrith will ensure that there continues to be sufficient primary school places, within statutory walking distance, within Penrith for local children and their families.
- 10.5 Through the creation of new and additional resource provision of Beaconside given the ongoing challenges with ensuring that children are given timely access to additional educational support to support inclusive education. Children within the existing key stage 1 resource provision will be afforded the opportunity to continue their primary school education within the same school without the need to transition to another school to complete Key Stage 2 of their education.

11. Background Documents

The following documents have been utilised in the preparation of this cabinet report:

- Beaconside Data Update 071123 Spreadsheet
- Penrith Area Distance Calculator Spreadsheet
- Eden Primary and Secondary Catchment Map 2019
- Beaconside Consultation Response Analysis
- Beaconside CE Projection Spreadsheet
- North Lakes Projection Spreadsheet
- Brunswick Projection Spreadsheet
- St. Catherine's Projection Spreadsheet
- Officer Delegated Decision to Consult – Beaconside CE Primary School
- Consultation Proposal Document

Appendix 1 - Consultation Document and Consultation Meeting Slides

Consultation Document

Expansion of Places at Beaconside CE Primary School Penrith

Consultation Proposal



What is the consultation about?

Westmorland and Furness Council is in receipt of funding from house builders to provide additional school places for children. This is intended to meet additional demand for school places as a result of recent housing developments in the Penrith area. This is known as 'Section 106 funding' and its purpose is to make sure that there are sufficient school places for the existing local population as well as those living in new housing. This consultation is regarding the Council's proposal to increase the number of mainstream school places at Beaconside CE Primary School, and to create some additional specialist places within a resourced provision (resourced provision provides specialist support for children with special educational needs and disabilities (SEND), within a mainstream setting).

The Proposal

- An increase in published admission number (PAN) which is the maximum number of children to be admitted in each year group. It is proposed to increase the PAN from the existing 73 places to 90 place and that this increase will be phased over several years. Whilst this increase is not significant enough to necessitate a formal consultation process Westmorland and Furness Council are consulting as we would like to understand the views of all interested stakeholders on this proposal. This proposal would result in a total of 119 additional pupils over a phased period. The increase would be accommodated through new, additional classroom space.
- The number of resourced provision places will increase from 10 to 24. This will enable both Key Stage 2 pupils as well as Key Stage 1 to be accommodated on site. This will consolidate existing provision within Penrith and negate the need for those children attending the Resourced Provision in Key Stage 1 to transition to North Lakes Junior School in Key Stage 2. Instead, they will be able to remain on roll at Beaconside with their peers in the same year group and continue to receive the specialist support they need.
- It is anticipated the construction work required would be completed by September 2026, (subject to further feasibility work).

Who is this consultation for?

This document is aimed at parents, staff and governors of Beaconside CE Primary School and anyone else with an interest, or stake in, education in the area.

Background

Local housing developments will add to numbers of school aged children living in Penrith, and the Section 106 funding provides a good opportunity to add capacity at the school to make sure there is sufficient space to accommodate the growing number of children. The additional resource provision places will help to meet the needs of the growing number of children with SEND in the local area, provide greater access to specialist help and support, and make it possible for children benefiting from it to be educated within their local community and accessing the same school until they reach the end of Year 6. Currently children have to transfer elsewhere at the beginning of year 3 to continue accessing the additional support they need. The statutory change would be implemented on 1 September 2026.

Have your say

As well as being able to complete the questionnaire (online or using the form below) you can attend a meeting to be held at the school to ask any questions you may have on **16 October 2023**, in Key Stage 1 Hall at the main entrance on Hutton Hill. There will be separate meetings for the staff/governors and parents/stakeholders as detailed below.

- Staff and Governors - 4.30 - 5.30pm
- Parents and other stakeholders - 6.00 - 7.00pm

What happens next?

Once the consultation period has closed, Westmorland & Furness' Cabinet will receive a report in December 2023 summarising the responses received. Taking into account those responses, the Cabinet will decide whether to proceed to the next stage of the process, which involves the publication of a detailed proposal for the expansion of school places, as well as the school's RP provision. Publication would trigger a statutory 4-week 'representation period', which provides another opportunity for interested parties to make their views known.

At the end of the representation period, the Cabinet will again consider any views submitted, and will make a final decision on whether the proposal should progress. We expect that final decision would be taken at the Cabinet's meeting in March 2024.

It is important that we hear your views.

Timeline

Consultation period	3 October 2023 – 31 October 2023
Consultation Meeting Staff and Governors - 4.30 - 5.30pm Parents & stakeholders - 6.00 - 7.00pm	16 October 2023
Eden Locality Board	18 October 2023
Cabinet for publication of notice	12 December 2023
Representation period (statutory)	6 January 2024 – 3 February 2024
Cabinet for final decision	26 March 2024
Implementation effective from	September 2026

This consultation runs until 31 October 2023, and you can complete the online questionnaire here.

<https://consult.westmorlandandfurness.gov.uk/education/expansion-of-places-at-beaconside-primary-school>

Please note that it is not possible to enter into individual correspondence.

If you would prefer, you can complete and return a hard copy of the questionnaire which is attached overleaf.



What happens next?

1. Please indicate your interest *(tick all boxes that apply)*

I am a:

Parent/carer of a child at Beaconside

Member of staff at Beaconside

Governor at Beaconside

Other

If other has been selected, please specify

2 Please use the space below to share your comments on the proposals:

Name (please print)

Address (incl. postcode)

The closing date for this consultation is **31 October 2023**

Please return by email to school.organisation@cumbria.gov.uk



Consultation Slides



Westmorland
& Furness
Council

Beaconside Proposal Consultation Meeting 16 October 2023

westmorlandandfurness.gov.uk



Welcome and Introductions



Background

- Cumbria County Council received funding (section 106 contributions) from house builders to provide additional school places for children. This is intended to meet additional demand for school places as a result of housing developments in the Penrith area.
- Responsibility for this funding and the proposals developed over recent years regarding spend of the money has now transferred to Westmorland and Furness Council. We are seeking to progress at pace to confirm agreement on use of the funding to benefit children and young people in Penrith
- This consultation is regarding the Council's proposal to expand Beaconside CE Primary School, creating additional mainstream and resourced provision places.



The Proposal

- An increase in published admission number (PAN) from the existing 73 places per year group to 90 places (phased increase). Resulting in up to 119 additional pupils
- **The Council is not statutorily required to consult on an increase of this size to mainstream provision. However, we are consulting as we would like to understand the views of all interested stakeholders on this proposal.**
- Resourced provision places increase from 10 to 24, enabling Key Stage 2 & Key Stage 1 to be accommodated on site.
- The project is expected to comprise of a combination of internal alterations, extensions, and new build units
- If proposal is approved, it is anticipated the construction work required would be completed by September 2026



Rationale

- The impact of new housing is likely to contribute to a need for additional capacity in Penrith. This proposal is intended to ensure that the town has sufficient school places for local children.
- Need to ensure suitability and sufficiency of the building for the existing as well as future children on roll
- Currently resource provision in Penrith is split between Beaconside and North Lakes and which requires pupils to transfer schools between KS1 and KS2.
- This expansion proposal will allow children attending this provision the opportunity to continue their primary education at Beaconside. They will be able to stay with their peer group without the need for transition to another school.



- It is important to note that this proposal relates only to Beaconside Primary School and is not a proposal to remove any resource provision from North Lakes Primary School.
- The Local Authority is undertaking a council wide review of its resource provision and discussions around the future of resource provision at North Lakes Primary School will be incorporated into this review.
- The funding contributions are not sufficient to fund a new school build, nor would there be sufficient demand to justify the creation of a new school.

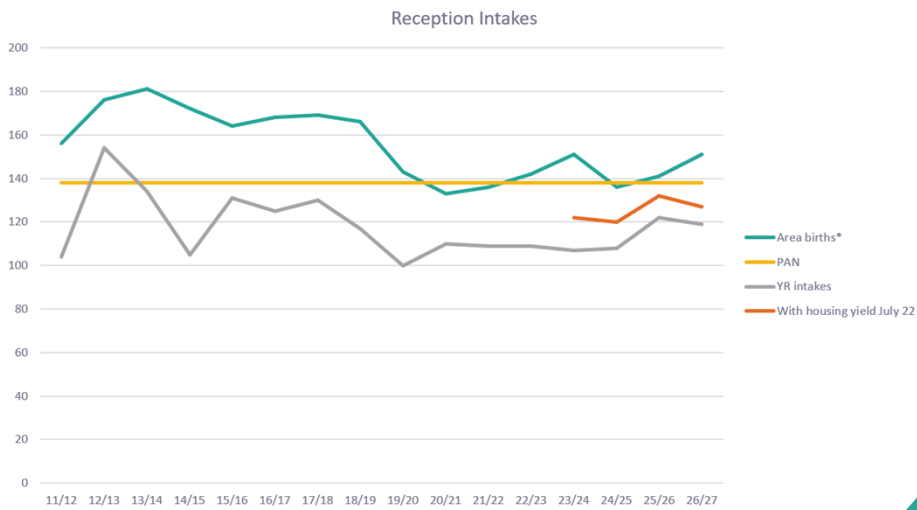


Rationale

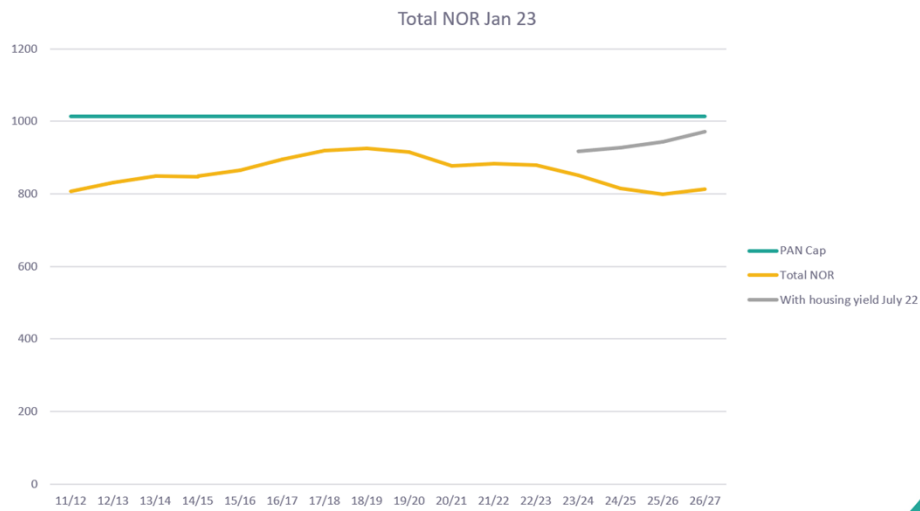
- Transport/travel impact and equality impact assessments will be undertaken to inform any decision that is taken by the Council's Cabinet in relation to this proposal.



Area births vs PAN



Numbers on roll vs PAN



Timetable

Consultation period	3 October 2023 – 31 October 2023
Consultation Meeting Staff and Governors – 4pm to 5pm Parents & stakeholders– 5.30pm to 6.45pm	16 October 2023
Eden Locality Board	18 October 2023
Cabinet for publication of notice	12 December 2023
Representation period (statutory)	5 January 2024 – 2 February 2024
Cabinet for final decision	26 March 2024
Implementation effective from	September 2026



How to respond to the consultation?

- This consultation runs until **Tuesday 31st October 2023**
- Notes are being taken at this evening's consultation meetings. All questions and responses will be included in the post-consultation report that will be presented to Cabinet in December 2023.
- You can complete the online questionnaire by following the link, below, as set out in the consultation leaflet,
- <https://consult.westmorlandandfurness.gov.uk/education/expansion-of-places-at-beaconsidece-primary-school>
- Please take the time to let us know your views on this proposal.



Thank you for your time.
Questions and comments





PROPOSAL TO EXPAND BEACONSIDE CHURCH OF ENGLAND PRIMARY SCHOOL, PENRITH

Section 19(1) of the Education and Inspections Act 2006 and the School Organisation (prescribed alterations to maintained schools) (England) Regulations 2016.

1. Name of Proposing Body and the Affected Educational Establishment

The proposing body is Westmorland and Furness Council, School Organisation Team, Post Box 305, Kendal, LA9 9GZ.

The affected Educational Establishment is Beaconside Church of England Primary School, Hutton Hill, Penrith, Cumbria, CA11 8EN. This is a voluntary aided Church of England School.

2. Description of Alteration

Westmorland and Furness Council is proposing to establish key stage two resource provision at Beaconside Church of England Primary School. This will create 14 new school places designated for children with physical and/or medical needs.

3. Evidence of Demand

The council has a statutory duty to provide sufficient school places for children within this area. This proposal is intended to ensure that Penrith has sufficient school places for local children. Recent new housing developments in Penrith will add to the numbers of school aged children living in Penrith. The Local Authority's Special Educational Needs and Disability Service is facing increasing pressures arising from an increased demand for specialist education placements.

4. Objectives of Proposal

The objectives of the proposal are to:

- Increase the number of resource provision places in the Penrith area.
- Ensure that the children attending the Key Stage One resource provision at Beaconside Church of England Primary school will also have the opportunity to continue their Key Stage 2 phase education at the school without the requirement for transition to another setting.
- Enable this cohort of children to be educated alongside their peer group whilst receiving any specialist support that is required.

5. Effect on nearby Educational Institutions

Projection and data for the entire planning area has been scrutinised to consider the impact on nearby local primary schools. The Local Authority is confident that the proposal will not adversely impact on other local schools. All relevant and local stakeholders have been consulted in relation to the proposal and an Equality Impact Assessment has been prepared and updated following the consultation process.

6. Funding for the Proposal

Westmorland and Furness Council ('the Council') is in receipt of Section 106 funding from several housing developments that have been constructed in the Penrith area. This funding has to be used to support the creation of additional primary school places and can be delivered by making improvements or extensions to existing schools in Penrith. The cost of the project will be fully funded through the utilisation of this Section 106 funding.

7. Implementation and Any Proposed Stages for Implementation.

The implementation date for the new resource provision to be established at Beaconside Primary Church of England Primary School in Penrith is 1 September 2026.

8. Objections and Comments

Within four weeks of the date publication of this notice any person wishing to raise objections or make comments on the proposal may do so in writing to the Westmorland and Furness Council, School Organisation Team, Post Box 305, Kendal, LA9 9GZ. or by emailing school.organisation@cumbria.gov.uk by 29 February 2024.



PROPOSAL TO EXPAND BEACONSIDE CHURCH OF ENGLAND PRIMARY SCHOOL, PENRITH

Notice is hereby given in accordance with section 19(1) of the Education and Inspections Act 2006 that Westmorland and Furness Council is proposing to establish key stage two resource provision designated for children with physical and/or medical needs at Beaconside Church of England Primary School, Hutton Hill, Penrith, Cumbria, CA11 8EN.

This proposal will create 14 new school places designated for children with physical and/or medical needs and ensure that children attending the Key Stage One resource provision at Beaconside Church of England Primary school will also have the opportunity to continue their Key Stage 2 phase education at the school. This will enable this group of children to continue to be educated alongside their peer group whilst receiving any specialist support that is required.

This notice is an extract from the full proposal which is available to view at

<https://www.westmorlandandfurness.gov.uk/schools-and-education/school-organisation>

or, on request from Westmorland and Furness Council, School Organisation Team at the address shown below.

Within four weeks of the publication of this notice any person wishing to raise objections or make comments on the proposal may do so in writing to the School Organisation Team, Westmorland and Furness Council, Post Box 305, Kendal, LA9 9GZ or by emailing school.organisation@cumbria.gov.uk by **29th February 2024**.

Signed:

Publication date:

Explanatory notes:

All objections made (and not withdrawn in writing within the representation period) will be sent in full to Westmorland and Furness Council's Cabinet. The final decision on whether or not to establish key stage 2 resource provision at Beaconside Church of England Primary School in Penrith will be made by Westmorland and Furness Council's Cabinet within two months of the end of the representation period. This decision will be taken in accordance with all relevant statutory guidance provided by the Department for Education.

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Equality Impact Assessment – School Organisation Change

Proposal to expand Beaconside CE Primary School Building in Penrith to enable establishment of new resource provision and facilitate a phased increase to the school’s published admission number.

Directorate	Children’s Services
Functional Area	Quality, Resources and Transformation
Assistant Director Responsible for EIA	Amy Holliman
Functional Area of EIA or Proposal	School Organisation

Aims of the EIA

Purpose of the EIA	<p>To identify any negative or adverse impacts that might arise for protected groups from the Local Authority’s proposal to expand Beaconside CE Primary School Building to:</p> <ul style="list-style-type: none"> • enable the establishment of key stage 2 resource provision for 14 children with physical and/or medical needs from 1 September 2026. • facilitate a phased increase, over time, in the school’s published admissions number from 73 to 90. <p>In the event that any negative or adverse impacts are identified then the EIA process should consider ways to mitigate any negative impact on protected groups.</p>
Summary of findings	<p>The following potential negative impacts that have been identified.</p> <ul style="list-style-type: none"> • Construction works required on site could be disruptive for pupils, especially those children with special educational needs and/or physical or medical needs, school staff and the wider local community.



	<p>The impact of this will be negated or mitigated by the actions proposed below.</p> <p>Any other issues identified during the consultation/statutory representation process will be addressed appropriately at a later stage and added to this assessment.</p>
<p>Scope of the EIA:</p> <ul style="list-style-type: none">• One directorate• Cross directorate• Outsourced organisation	<ul style="list-style-type: none">• One Directorate – Children’s Services• Beaconside School• Schools with abutting catchment areas• The local community

Phase 1: Gathering information

List examples of background information that you think are **relevant**. If carrying out an assessment of a proposal this section should include the data used to establish whether the proposal has an impact.

Type of information	Findings
The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013	This proposal needs to be developed and consulted upon in accordance with regulations as set out below. The School Organisation (Prescribed Alterations to Maintained Schools) (England) Regulations 2013 (legislation.gov.uk)
Equality Needs Analysis 2023	https://cumbria.gov.uk/elibrary/Content/Internet/535/609/38323/44648152628.pdf
Cumbria Observatory (Children's Centre Profiles)	Beaconside School is situated within the North Eden's Children's Centre Footprint. Profiles of the Children's Centre footprints Children's Centre Footprint profiles can be found at: https://www.cumbriaobservatory.org.uk/childrens-centre-footprint-profiles/
Education	Ofsted Inspection Report: 5-6 November 2019 'Good' [50130944 (ofsted.gov.uk)]
Ethnicity	7.5% of all pupils in Cumbria are from a Black Minority Ethnic (BME) background (January 2023 School Census) and there are 86 languages spoken in Cumbria's schools.
Special Educational Needs	Schools monitor pupils by category of Special Educational Need rather than disability. The population of children with different Special Educational Needs is monitored to help ensure we have the provision as well as the policies to meet these needs, thus improving equality of opportunity.
Gender	In line with national data there is an attainment gap between girls and boys at KS1 and KS2. In Cumbria in 2019, the gap between the performance of the boys and girls for reading, writing and maths combined at KS1 was 11.4% points for those achieving the expected standard. For KS2 the gap was 8% points for reading, writing and maths combined.
Social Care	The Children's Social Care service collects data on age, gender, ethnicity and disability. Issues arising from an analysis of the information include the proportion of



BME and mixed-race children seeking adoption compared to White British families and the supply of BME fosterers and adopters.

Phase 2 Impacts

From the evidence above use this section to identify the risks and benefits according to the different characteristics protected by the Equality Act.

All/general: Any issue that cuts across a number of protected characteristics

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
Overall Deprivation (Index of Multiple Deprivation, measures deprivation across seven domains as follows: Income; Employment; Education, Skills and Training; Health and Disability; Crime; Barriers to Housing and Services; and Living Environment).		Index of Multiple Deprivation (IMD) is from 2019. A decile of 1 refers to the 10% most deprived communities in England, while a decile of 10 refers to the 10% least deprived communities in England. In relation to overall levels of deprivation, the 2019 IMD classified the area where Beaconside School is located as sitting within decile 4 (within the 40% most deprived of communities in England).	Awareness of issues -action will be taken in accordance with Westmorland and Furness Council (WFC) policies where appropriate.
Geographical Barriers to Services (Sub-Domain of the Index of Multiple Deprivation, which measures physical proximity to essential services)		In relation to geographical barriers to services, the 2019 IMD classified the area Beaconside School as sitting within decile 10 (within the 10% least deprived of communities in England).	



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<p>Impact on education of children from Beaconside School and Penrith Area</p>	<ul style="list-style-type: none"> • A phased increase of Beaconside’s School published admission number from from 73 up to a maximum of 90, increasing the overall capacity of the school from to a maximum of 630 over time. • The establishment of new key stage 2 Resourced Provision to create 14 additional places designated for children with physical and/or medical needs from 1 September 2025. • Beaconside is a good school therefore this proposal will allow more children to attend this provision. This proposal will also enable those children who are currently attending the key stage 1 resourced provision at Beaconside to, avoid transition to another setting and, continue their education at Beaconside alongside their peers whilst 	<ul style="list-style-type: none"> • Potential negative impact on other schools in the area. All other schools in the Penrith area are currently rated as good and pupil projections do not indicate that the proposal will have an adverse impact on other local schools. In addition, the proposed expansion will be phased in so as to further reduce any possible impact. 	<p>If approved, the delivery and implementation of the proposal will be overseen by the School Organisation Review Group to ensure that the project is managed in a way that mitigates any risk to the educational provision on offer at Beaconside. The physical expansion of the building will be project managed by a Change Project Manager from the LA’s Capital Programme Directorate.</p>
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	still accessing the special educational support that they required.		
Employees – potential redundancy/displacements	It is intended that both the mainstream and resource provision elements of the proposal will be phased in and the Governing Body of Beaconside Primary School will appoint additional staff in accordance with the timing for these phases.		There are no potential staffing redundancy or displacements as a result of these proposals as if proposal is approved Beaconside Primary School will be required to recruit addition staff as the expansion proposal is phased in.
Transport	Children who are currently attending the Key Stage 1 resource provision in Beaconside will be able to remain at Beaconside and continue to be educated alongside their peers without the need for transition to another setting as is currently the case. This may have a positive impact on home to school travel patterns for these children and their families.		No action required



Disability and health and wellbeing: All forms of disability recognised under the Disability Discrimination Act including sensory impairment, mental health, learning disabilities, mobility related conditions, conditions such as heart disease, diabetes, and asthma. This also covers any impact on health and well being

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
Children with special educational needs.	<p>This proposal is intended to increase provision in Penrith for children with special educational, physical or medical needs. This will enable children currently attending the Key Stage 1 provision to continue into Key Stage 2 at Beaconside Primary without the need to transition to another setting as is currently the case.</p> <p>There is a well-established case for the need for additional resource provision in the Penrith area.</p>	The building works required to facilitate proposed building expansion has the potential to disrupt the smooth running of the schools and the day to day routines of pupils at the school. This may prove to be particularly challenging for pupils with special educational, physical or medical needs.	The building programme will be project managed by an experienced Change Project Manager with extensive experience of managing school capital programme and working with school leaders to minimise disruption. The delivery of the project will be overseen by the Council's School Organisation Review Group.

Gender, Transgender and Marital Status

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
None identified			



Ethnicity: All ethnic groups including Asian, Black, East Asian and white minority ethnic groups, including Eastern Europeans and Gypsy and Travellers.

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
None identified			

Sexual Orientation: including heterosexual, gay, lesbian and bisexual people

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
None identified			

Age: Where a person is at risk of unfair treatment because of their age group

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
None identified			

Religion/belief: all faiths including Christianity, Islam, Judaism, Hinduism, Buddhism, Sikhism and non religious beliefs such as Humanism

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
Beaconside is a voluntary aided Church of England School but the school's admission policy does not contain any faith	Neutral	Neutral	None.



based criterion.			
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Community Cohesion: This is where a decision or a change to services may risk creating tensions between community groups in a local area.

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
Construction work required on school site.	Construction work is essential in order to facilitate the expansion by the provision of additional classroom space and other works to address longstanding accessibility and suitability issues at Beaconside Primary School.	This could be disruptive for pupils (particularly those children with special educational needs, physical or medical needs), staff, parents and the local community.	The building programme will be project managed by an experienced Change Project Manager with extensive experience of managing school capital programme and working with school leaders to minimise disruption to the school and local community. The delivery of the project will be overseen by the School Organisation Review Group
Impact on other existing educational institutions locally and impact on the community	Additional primary places, both resourced provision and mainstream, places will be available in the local area. All relevant stakeholders are in agreement with the proposal to	Concerns have been raised about the impact of the mainstream expansion element of the proposals on other local schools.	If the proposal is approved, all physical works will be completed by 1 September 2026



	establish the new key stage 2 resource provision at Beaconside.		and the resource provision will be established on 1 September 2026 However, the mainstream expansion will be phased in, over time, in order to minimise the impact on other local schools.
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Phase 3: Action Planning

Based on actions raised in the action required box above

Area for further action	Actions proposed	Lead officer	When	Resource implications	Outcome
Consultation process	Work to identify inequality issue and possible mitigating factors. Make as fair and as accessible as possible	Sharyn Duffey	During planning stage	None	Equality issue addressed within consultation process
Regular refresh of the EIA throughout the course of the consultation	EIA regularly updated	Sharyn Duffey/Lee Turner	Ongoing	None	Ensure that EIA is accurate and up to date



Update EIA with new information and issues raised from consultation	Following consultation period this EIA will be refreshed to consider inequality issues raised.	Sharyn Duffey/ Lee Turner	Ongoing	Identified from issues raised	WFC ensures that all necessary actions are being undertaken to prevent discrimination, promotes equality of opportunity and fosters positive community relations.
Implementation	If Westmorland and Furness Council Cabinet agree to implement the proposal then the proposal will be overseen by the School Organisation Review Group				EIA to be reviewed following statutory representation period and then if Cabinet decides to proceed with proposal at regular stages during project implementation.

Documents appended to the Equality Impact Assessment – this Equality Impact Assessment should be read in conjunction with the consultation document and post-consultation committee report.

Quality Assurance and EIA completion

Date completed	September 2023 and updated in December 2023 following completion of consultation exercise in preparation for Cabinet Decision in relation to publication of statutory notice for establishment of new resource provision.
Lead officer	Sharyn Duffey
Have staff been involved in developing the EIA?	
Have community organisations been involved?	All relevant stakeholders have been consulted about the



	proposal as in accordance with statutory guidance issued by the Department of Education.
Date of next refresh	This EIA has been updated in response to the consultation exercise that was undertaken in October 2023. if the Cabinet makes the decision to proceed with the proposal to proceed to statutory notice stage. The EIA be updated in February 2024 following the end of the statutory representation period

WESTMORLAND AND FURNESS COUNCIL

Cabinet

Report Title	Proposal to close North Walney Nursery and Primary School from 31 August 2024.
Date of Meeting	23 January 2023
Report Author	Amy Holliman, Assistant Director, Quality, Resources and Transformation.
Director	Milorad Vasic, Director of Children’s Services
Lead Cabinet Member	Sue Sanderson, Cabinet Member for Children's Services, Education and Skills
Why is this a key decision?	<p>1. an executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council’s budget for the service or function to which the decision relates. NO</p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are “significant” if they are equal to or greater than £500,000. YES</p> <p>For clarification, no treasury management decision shall constitute a Key Decision</p>
Wards Affected	North Walney and South Walney
Identify exempt information and exemption category	Not applicable
Reasons for urgency (only where applicable)	Not applicable
Appendices (if any)	<p>Appendix 1 Consultation Document and Presentation Slides</p> <p>Appendix 2- Copy of Statutory Proposal</p> <p>Appendix 3 – Copy of Statutory Notice</p> <p>Appendix 4 – Equality Impact Assessment (EIA)</p>

1. Executive Summary

- 1.1 Westmorland and Furness Council is concerned about the increasing pressure upon both leadership and staff at North Walney Nursery and Primary School to continue to provide a quality educational offer given the ongoing decline in the number of pupils at the school and the resulting impact on the school’s financial position.

- 1.2 With the approval of the Director of Children’s Services and the Portfolio Holder Children’s Services, Education and Skills, a public consultation exercise on a proposal to close the school was undertaken between 1 November 2023 and 12 December 2023. The outcome of this consultation exercise is set out in this report.
- 1.3 This report seeks a Cabinet decision for the publication of a statutory notice and statutory proposal for the proposed closure of North Walney Nursery and Primary School from 31 August 2024.

2. Recommendations

For the reasons set out in this report, Cabinet is recommended to:

- 2.1 Approve the publication of a statutory notice and statutory proposal for the proposed closure of North Walney Nursery and Primary School from 31 August 2024.
- 2.2 Note that the publication of a statutory proposal will trigger a four-week ‘representation period’, and that Cabinet will be required to make a final decision on the proposal within a period of two months from the end of the representation period.

3. Information: Rationale & Evidence for the Recommendations

- 3.1 The Local Authority recognises that it is to the credit of the leadership, staff, parents and pupils of North Walney Nursery and Primary School that the school has continued to provide a quality educational offer during what has proven to have been a challenging period for the school.
- 3.2 The Local Authority are concerned about the increasing pressure upon both the leadership and staff of North Walney Nursery and Primary School to continue to provide a quality educational offer given the ongoing decline in the number of pupils at the school and the resulting impact on the school’s financial position.
- 3.3 In accordance with the statutory guidance for “Opening and Closing of Maintained Schools’ (January 2023), reasons for closing a maintained school include situations where there is no predicted demand for a school in the medium to long term, there are surplus places elsewhere in the local area which can accommodate displaced pupils and where the school is no longer considered viable. The Local Authority considers that the proposal to close North Walney Nursery and Infant School meets these criteria.
- 3.4 Given the school’s status as a designated rural school the Department for Education expects decision makers to adopt a presumption against the closure of rural schools. This does not mean that a designated rural school should never close but that the case for closure should be strong and clearly in the best interests of educational provision in the area.
- 3.5 In drawing up the proposal to close North Walney Primary and Nursery School from 31 August 2024, Westmorland and Furness Council has taken account of the Department for Education’s guidance in relation to designated

rural schools and is satisfied that the proposal fully addresses all of the considerations relating to proposals to close designated rural schools. These considerations are set out in detail in paragraph 3.17 below.

Number of Pupils on Roll and Future Pupil Projections

- 3.6 As set out the in the consultation document attached at Appendix 1, North Walney Primary School is significantly under-subscribed. There has been a sharp decline in the number of pupils on roll at the school since 2019/20 when the school provided education for 84 children. The number of children on roll in the school at the beginning of the academic year 2023/24 was 27. The school has a capacity of 161 based upon its published admission number.
- 3.7 Births in the North Walney catchment area have reduced in recent years, as they have across Walney Island. Due to fewer children being born, there is little prospect of a significant increase in the number of pupils on roll at North Walney Nursery and Primary School.
- 3.8 In addition, there is little opportunity for pupil growth as a result of inward migration because there are no substantial housing developments planned for Walney Island within the next four-year period.
- 3.9 Live birth data from the Office of National Statistics (ONS) suggests that there has been an average of 26 births per year, over a four-year period in the North Walney area, but many of the parents of these children have chosen not to attend North Walney Primary School. The percentage of children in the area choosing to attend the school is declining from 57.1% in 2019/20 to 6.9% in 2022/23.

Quality of Education

- 3.10 The Local Authority recognises the work undertaken by the school's leadership and staff to continue to provide a quality educational offer in challenging circumstances.
- 3.11 However, the governing body is finding it extremely difficult to recruit and retain staff in the current climate and the Local Authority considers that this is increasing the workload on existing school staff to levels that are now unsustainable. The Local Authority is concerned that staffing instability and financial restraints have also hampered development of leadership at subject level and impacted on professional development, workload and the well-being of staff.
- 3.12 The current Ofsted Inspection framework requires all schools to evidence a 'good' quality of education over time, demonstrating a broad, rich curriculum sequenced in a logical progression to enable all children to acquire the intended knowledge and skills from Reception to Year Six. Although the last Ofsted inspection in June 2019 gave the school a rating of 'Good', it is the Local Authority's view that the next Ofsted inspection, conducted in accordance with the current inspection framework, would likely give a reduced rating.

Availability of Places in the Local Area.

- 3.13 There are four other schools (including South Walney Infant and Junior schools together) within a two-mile radius of North Walney Primary School. Three of them are located on Walney Island and all of them have unfilled places. There is substantial unallocated capacity in the area with more than 30% of primary school places projected to remain unfilled during the academic years 2024/25, 2025/26 and 2026/27.

All of the pupils that were on roll at the school at the time of the consultation could be accommodated at any of the other schools in the area, including at Vickerstown Primary School which is the nearest school to North Walney Nursery and Infant School. Given the availability of places within the area, the proposed closure should not result in increased transport usage as a result of changes to the mode of school travel journeys.

There are very low numbers accessing a funded nursery school place at the school with only 2 children projected to attend in summer 2024 term. There are no identifiable gaps in early years provision on Walney Island. Two of the other schools on Walney Island also have nursery classes with places available and there is a PVI childcare provider on the island that has nursery places available. Given this, the proposal to close North Walney Primary and Nursery School would create any issues with childcare sufficiency in the area.

Financial Viability

- 3.14 Budgets for running costs (staff salaries, heating, lighting, etc.) are devolved to schools largely on the basis of pupil numbers. Many of these costs are fixed regardless of how many children are in the school. Therefore, a lower number of children will produce a lower budget, meaning there is less money to actively support the provision of teaching and learning.
- 3.15 The Local Authority recognises the work that has been undertaken by the Governing Body at North Walney Nursery and Primary School to reduce the school's budget deficit. However, as set out in detail at Section 7 of this report, North Walney Primary School still has a significant budget deficit. Given the existing and projected pupils numbers, despite the best efforts of the Governing Body, there is little prospect of the school being able to create and implement a realistic deficit recovery plan without further impacting on the quality of teaching and learning at the school. School funding allocations are based on a national formula, and the Council is not allowed to provide additional financial support to the school from non-DSG funds.
- 3.16 Given this, the Local Authority is concerned that the pressure upon both the leadership and staff of North Walney Nursery and Primary School to continue to provide a quality educational offer is reaching an unsustainable level, given the ongoing decline in the number of pupils at the school and the resulting impact on the school's financial position.

Proposals to Close Designated Rural Primary Schools.

3.17 As set out above in paragraphs 3.4 and 3.5, statutory guidance requires that when formulating any closure proposals in relation to a school that is a designated rural, primary school, proposers must have regard to the following:

1. the likely effect of the discontinuance of the school on the local community
2. the availability, and likely cost to the local authority, of transport to other schools;
3. any increase in the use of motor vehicles which is likely to result from the discontinuance of the school, and the likely effects of any such increase; and
4. any alternatives to the discontinuance of the school.

Proposers, for all rural closures, in addition to the above, should also provide evidence to show they have carefully considered:

- alternatives to closure including: conversion to academy status and joining a multi-academy trust or federation with another local school;
- the scope for an extended school to provide local community services and facilities (e.g. childcare facilities, family and adult learning, healthcare, community internet access);
- the availability, and likely cost to parents, of transport to other schools including whether the proposal will result in unreasonably long journey times;
- the size of the school and whether it puts the children at an educational disadvantage e.g. in terms of breadth of curriculum or resources available;
- the proportion of pupils attending the school from within the local community
- the overall and long-term impact on local people and the community of the closure of the school and of the loss of the building as a community facility;
- educational standards at the school and the likely effect on standards at neighbouring schools;
- whether the school is now surplus to requirements (e.g. because there are surplus places elsewhere in the local area which can accommodate displaced pupils, and there is no predicted demand for the school in the medium or long term);
- wider school organisation and capacity of good schools in the area to accommodate displaced pupils

Officers are clear that all these considerations have been taken into account in developing this proposal.

4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)

4.1 The proposal supports the Council Plan priority 'People' contributing to:

- Supporting active, healthy, happy lives for the young and old and being ambitious for all our children and young people
- Supporting people in need and reducing inequality, working closely with all schools to ensure that young people have opportunities to access the best education.

4.2 The Council Plan is supported by the Delivery Plan Framework which sets out the key projects the Council plans to carry out during the year and what it aims to achieve. This proposal is aligned to our delivery of aspects relating to the strategic delivery theme of Learning – and ensuring that everyone has access to high quality education and that children young people and adults are equipped with relevant tools, skills and aspirations to pursue the life they want to live .

5. Consultation Outcomes

5.1 A public consultation exercise on closure was undertaken between 1 November 2023 and 12 December 2023.

5.2 Interested parties were given the opportunity to attend consultation meetings held at North Walney Nursery and Primary School or share their views by email or by participating in an online questionnaire.

Outcomes from Online Questionnaire

5.3 The online consultation process concluded, with 17 responses being received from a variety of different parties with an interest in the proposal.

5.4 The main categories of respondents are classified as follows:

1. Three respondents (18%) to the consultation process were parent/carers of children at North Walney.
2. One teacher (6%) from North Walney Nursery and Primary School responded to the online consultation.
3. 13 responses were received from the other category (76% overall).

From the other category:

4. Five responses were received from educators in the locality (38% of the other category).
5. Two participants responded anonymously (15% of the other category).
6. A local councillor responded (8% of the other category).
7. Four local residents and one grandparent responded (39% of the other category).

5.5 The consultation outcomes can be summarised as follows:

1. Six respondents (35%) were in favour of the discontinuation of primary education at North Walney Primary school.
2. Four respondents (24%) felt that the headteacher and board of governors currently leading the school deserved more time for the impact of the positive work that they have been undertaking to take effect.
3. Five people (29%) were concerned that the quality of education for the children would be negatively affected from being compelled to relocate to other schools in the vicinity.

Outcomes from Consultation Meetings.

5.6 Consultation meetings were held at the school on 8 November 2023, with three separate meetings being held for the Board of Governors, staff (including their Trade Union Representatives), and parents and the local community respectively. At each meeting, Local Authority officers were keen to convey their understanding of the impact and emotion generated by a consultation on a proposal to close a school. They were keen to ensure that all stakeholders were aware that the proposal should not be perceived as a criticism of the leadership and staff working at the school who have worked to achieve the best possible educational outcomes in, often, challenging circumstances.

The following key themes emerged from across the three consultation meetings:

5.7 Background to the proposal and reasons for decline in pupil numbers.

- Whilst accepting the data that was presented by the Local Authority regarding falling birth rates and falling pupil numbers in the area, the Governing Body were keen to express their view the sudden fall in pupil numbers in 2019/20 was in direct response to miscommunication regarding discussions between the then Cumbria Local Authority and the School about a proposal to close the school.
- The Governing Body's view was that this resulted in parents of pupils at the school withdrawing them from the school and seeking places for their children at other local schools. Whilst noting this, the Local Authority is unable to comment further given this relates to a historic set of events that occurred prior to the establishment of Westmorland and Furness Council.
- Officers from Westmorland and Furness Council are clear that this proposal has been developed in response to a robust data set comprising of birth rates, pupil projections, housing developments, surplus school places and patterns of parental preferences for school places in the area.

5.8 School's Budgetary Position and Deficit Recovery Plan

- The Governing Body did not agree with the Local Authority's financial assessment of the school's current budgetary position. It was agreed that there was a gap between the Governing Body's assessment and the Local Authority's assessment, with the Governing Body adopting a more optimistic position than the Local Authority.
- Whilst recognising that the Governing Body had taken steps to reduce the deficit and deliver a balanced in year budget, the Local Authority is projecting that the deficit will continue to grow over the coming academic years and there is little scope for reducing this deficit without making further reductions to staffing at the school, which will impact on the school educational and financial viability.
- The Local Authority did offer the Governing Body a further meeting to discuss the school's budgetary position and deficit recovery plan so that they were clear about the assumptions being made by the Local Authority. However, this offer was not taken up.

5.9 Concerns about availability of places for pupils at other schools in the event of a decision to close the school.

- Concerns were expressed about the capacity of other local schools within the area to offer schools places to pupils from North Walney School in the event of a decision to close the school. All stakeholders were advised that given the numbers on roll at other schools in the locality and the level of surplus places in the area. The Local Authority is confident that, in the event of a decision to close the school that all pupils would be able to be accommodated within local schools within a "reasonable walking distance" to their family home. It was also noted all local schools in area were categorised a 'good' at their most recent Ofsted inspections.

5.10 Concerns about pupils leaving the school prior to decision being taken in relation to the proposal and how students and their families would be supported in the event of a decision to close the school.

- Stakeholders, particularly, members of the Governing Body raised concerns that the Local Authority's decision to consult on a proposal to close the school would lead to the majority of pupils leaving the school in advance of any decision to close the school. Local Authority Officers were clear that it was the Local Authority's preference for parents to ensure that their children continued to attend the school so that in the event of a closure decision the school transfer process can be managed smoothly and effectively. Advice and support can then be given to parents in relation to admissions issues and provision of new school uniforms.
- However, it was noted that in accordance with the School Admissions Code parents were free to make applications to other schools at any

point in the academic year and the Local Authority can do nothing to prevent this.

5.11. Concern about school staff and how they would be supported throughout this process.

- It was noted that staff at the school will be concerned about the proposal and what it means for them personally and professionally. It was agreed that the Local Authority needed to listen carefully to the views of staff and their representatives, to ensure that all staff are given appropriate advice and support depending on their individual circumstances.
- Whilst not wanting to pre-empt the outcome of any consultation, it was agreed that initial one-to-one meetings would be offered to each staff member to discuss their current position so that bespoke packages of support could be offered to each member of staff.

5.12. Future use of the school building if proposal is approved.

- Local Authority Officers were clear to emphasise that it would not be appropriate to enter into any discussions about the future use of any school building during a consultation about a proposal to close that a school in as a result of concerns about its ongoing educational and financial viability.
- In the event that the Local Authority does take a decision to close any schools then as with any building that is in the ownership of the Local Authority, decisions about the future use of a school would be taken in accordance with the Local Authority agreed processes for discontinuation and future use.

5.13. The Proposals were presented to Furness Locality Board on 28 November 2023, as part of the consultation exercise. Members RESOLVED:

- To Note the rationale and details of the consultation proposal
- To Note that Cabinet would consider all responses arising from the consultation, including any response made by the Furness Locality Board before deciding whether or not to proceed with to the next stage of the statutory process.

6. Alternative Options Considered

6.1 Further Budget Efficiencies - As set out above, the Governing Body of the School have worked to implement a series of budget efficiency measures that have reduced the budget deficit and improved the schools in-year budgetary position. In addition, the school has explored options to generate additional income including letting out school facilities to another school and third sector organisations. These initiatives may have assisted the school to remain viable in the event of a temporary reduction of numbers, where pupil projections have demonstrated that there will be a demand for places at the

school in the short to medium term. However, it is the view of the Local Authority that these initiatives are not sufficient to enable the school's leadership to overcome the structural financial challenges arising from low pupil numbers, future pupil projections and the level of surplus school places in the local area.

- 6.2 Academisation –It is unlikely that academisation would be an option for the school at this current time given the ongoing concerns about the financial and educational viability which would not make the school an attractive proposition for a Multi Academy Trust.
- 6.3 Taking no action – For the reasons set out in the consultation document, and within this report, taking no action is not an option. This is because of the ongoing concerns about the financial and educational of North Walney Nursey and Primary School. The deficit is projected to continue to increase, and educational outcomes are likely to decline. In the event that the school is subject to an academy order the Local Authority will continue to be liable for the increased deficit or will be compelled to consult on closure at that time.

7. Financial Implications and risk

- 7.1 There are no direct financial consequences arising from the recommendations to note the outcomes of the consultation, to approve the publication of a statutory notice and statutory proposal for the proposed closure of North Walney Primary School from 31 August 2024, and to note the requirement for Cabinet to make a final decision on the proposal.
- 7.2 At the point where Cabinet is required to make a decision on the proposal there will be financial implications relating to the school's budget share and cumulative deficit.
- 7.3 The school is funded through the Schools Block of the Dedicated Schools Grant (DSG). Funding is based on the National Funding Formula meaning the majority of the funding is linked to numbers of pupils in school on the October census day. As a result of the falling pupil numbers at the school, funding is also reducing.
- 7.4 The school closed the 2022/23 financial year with a deficit of £0.161m. Any deficit relating to the school at the point of closure will transfer to the Council and be funded from the DSG contingency budget. The school's remaining budget share for the 2023/24 financial year will be used to support any potential redundancy costs arising as a result of closure, and potentially support any schools receiving additional pupils from North Walney Primary School.

8. Legal and Governance Implications

- 8.1 The legislation that Cabinet must have regard to when deciding whether to issue the formal closure notices in respect of North Walney Nursery and Primary School is set out in sections 15 and 16 of the Education and Inspections Act 2006 and regulations 11 and 12 of the School Organisation (Establishment and Discontinuance of Schools) Regulations 2013. The

guidance issued by the DFE 'Opening and Closing Maintained Schools 2023' provides detail on the statutory process for school closure and the factors that the decision maker must have regard to when approving such proposals.

- 8.2 The consultation that has been carried out in respect of the proposed closure and reported on in section 5 of this report is stage one of the statutory process. As per section 16 of the Education and Inspections Act 2006, the local authority is obligated to consult with specific interested parties prior to issuing formal closure notices. When considering the consultation responses, Cabinet should not only take account of the number of people expressing a particular view but should give the greatest weight to responses from those stakeholders likely to be most directly affected by a proposal. Cabinet should give clear reasons for its decision.
- 8.3 At this stage of the statutory process (the second stage), Cabinet is being asked to approve a recommendation (2.1) to publish the formal closure notices setting out specific proposals for the closure of North Walney Nursery and Primary School. The publication of the formal closure notices triggers a statutory consultation period of 4 weeks. It is only after this 4-week period that Cabinet will be asked to determine if North Walney Nursery and Primary School should close.
- 8.4 Formal closure notices should be published within 12 months of the completion of the initial consultation period (consultation was completed on 12/12/23). A notice must contain the information specified in Schedule 2 of the Establishment and Discontinuance Regulations 2013.
- 8.5 Although Cabinet is not, at this stage, being asked to decide whether North Walney Primary should close, it should note some key considerations in respect of that decision, so as to make an informed decision as to whether to publish the formal closure notices.
- 8.6 The local authority has a duty under section 14 of the Education Act 1996 to ensure that there are sufficient schools providing appropriate education to meet demand and to secure diversity in the provision of schools. Therefore, Cabinet should take into account the number of pupils currently on roll, the medium and long term need for places in the area, and whether standards at the school have been persistently low.
- 8.7 There is a presumption against the closure of rural schools. North Walney Primary has been designated a rural school as per the Designation of Rural Primary Schools (England) Order 2022. The case for closure should be strong and clearly in the best interests of educational provision in the area. As such Cabinet needs to be confident that the local authority has provided evidence to show they have carefully considered alternatives to closure including federation with another local school; conversion to academy status and joining a multi-academy trust; the transport implications i.e. the availability, and likely cost of transport to other schools and sustainability issues; the overall and long-term impact on the local community of the closure of the school and of the loss of the building as a community facility, along with wider

school organisation issues and the capacity of good schools in the area to accommodate displaced pupils.

- 8.8 The local authority has the power to issue the formal closure notices in respect of North Walney Primary (section 15 Education and Inspections Act 2006) and Cabinet has the power to make this decision on behalf of the local authority as per Part 2 – Section 4: Responsibility for Executive Functions paragraph 1.1 of the Constitution and confirmed in Part 2 – Section 6: Officer Scheme of Delegation paragraph 3.18.

9. Human Resources Implication

- 9.1 Should the decision be made to close North Walney Nursery and Primary School, HR support will be required to ensure a robust redundancy consultation is carried out with the remaining staff and will support the managing change process through to completion.
- 9.2 Local Authority Officers will work with Senior Managers and Trade Union colleagues to ensure wrap around support is provided to ensure the wellbeing of staff is a priority.
- 9.3 Advice will be provided around the redundancy and managing change procedure, mitigating the risk of redundancy where possible by considering redeployment within the wider council and providing job search support for roles both internally and external to the council.

10. Equality and Diversity Implications (including the public sector equality duty, Armed Forces Families, Care Leavers and Health inequalities implications)

- 10.1 Whilst the closure of the school will remove an element of parental choice in the area, the movement of pupils to the other local schools will help to ensure their longer-term viability.
- 10.2 All schools are inclusive and offer support tailored to children's needs, but the School Improvement Service will work with receiving schools and North Walney on any specific issues if the ultimate decision is to close, to ensure a smooth transition to the new school and that any risk of disadvantage is minimised.
- 10.3. An Equality Impact Assessment has been undertaken in respect of the proposal and is attached at Appendix 4.

11. Background Documents

The following documents were utilised in the preparation of this cabinet report:

- North Walney School Ofsted Report – July 2019
- North Walney Data Pack Spreadsheet
- North Walney Projection Spreadsheet
- Barrow Island Community Projection Spreadsheet
- South Walney Infant Projection Spreadsheet

- South Walney Junior Projection Spreadsheet
- Vickerstown Projection Spreadsheet
- St. Columba's Projection Spreadsheet
- Walney and Barrow Island Loyalty Map
- North Walney Consultation Response Analysis
- North Walney Consultation Document
- Opening and Closing of Maintained School, Statutory Guidance for Decision Makers (January 2023).

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Appendix 1 - Consultation Document and Consultation Meeting Slides

Consultation Document

Consultation on a proposal to close North Walney Primary and Nursery School





Introduction

This consultation is about the potential closure of North Walney Primary and Nursery School, Duddon Drive, Barrow-in-Furness, Cumbria LA14 3TN from 31 August 2024.

Westmorland and Furness Council is concerned about the increasing pressure upon both the school's leadership and staff to continue to provide a quality educational offer given the ongoing decline in the number of pupils at the school and the resulting impact on the school's financial position.

Given this, the Council considers that it has a responsibility to all members of the North Walney school community to formally consult on the school's future sustainability.

This document sets out the background to the consultation, the timescale for the consultation process and how interested parties can participate in the consultation process.

Background

As set out in Table A below, as of September 2023, the confirmed number of pupils on roll at North Walney Primary school was 27. The total capacity of the school based upon the current published admission number is 161.

Table A - Number of Pupils on Roll at North Walney Primary -September 2023

Year Group	PAN	Current Class Size
Reception	23	3
Year 1	23	3
Year 2	23	8
Year 3	23	1
Year 4	23	4
Year 5	23	2
Year 6	23	6
Total	161	27

Table B - North Walney Primary School Numbers on Roll - Historic and Projected.

	Historic				Current	Forecast			
	2019/20	2020/21	2021/22	2022/23	2023/24	2024/25	2025/26	2026/27	2027/28
Reception	12	10	9	2	3	3	5	5	4
Year 1	11	9	8	5	3	3	3	5	5
Year 2	9	11	5	1	8	3	3	3	5
Year 3	13	10	17	3	1	8	3	3	3
Year 4	11	13	10	1	4	1	8	3	3
Year 5	12	11	13	6	2	4	1	8	3
Year 6	16	12	10	4	6	2	4	1	8
Total	84	76	67	22	27	24	27	28	31

Table B shows that there has been a continuous drop in numbers across all year groups over recent years. In 2019/20 the number on roll was 84, by 2021/22 this number had fallen to 67 with a further reduction to 22 by 2022/23. The number of pupils on roll is predicted to remain very low.

In line with national trends, the number of births in the North Walney catchment area has reduced in recent years, as it has across Walney Island. For the foreseeable future there here is little prospect of significant growth in pupil numbers for North Walney School. The forecast data above is based upon live birth data from two separate sources ONS Birth Data and General Practitioner Registrations.

Table C also illustrates that there is little opportunity for pupil growth as a result of inward migration to the area from new housing developments.

Table C - Housing Developments relating to North Walney Primary School

	Forecast			
	2024/25	2025/26	2026/27	2027/28
Projection	27	24	27	28
Housing 5 year plan	0	0	0	0
Projections plus 5 year plan	27	24	27	28
Housing S106	0	0	0	0
Projections plus S106	27	24	27	28

There are five schools within a two-mile radius of North Walney Primary School, with four of them located on Walney Island.

Charts A and Chart B, illustrate that Walney Island area has a significant number of surplus places overall. There is a marked projected increase in surplus places for Key Stage 1 by September 2026 with 37% of the overall number of places unallocated.

Chart A - Projected Percentage of Surplus Primary School Places in Walney Island Area

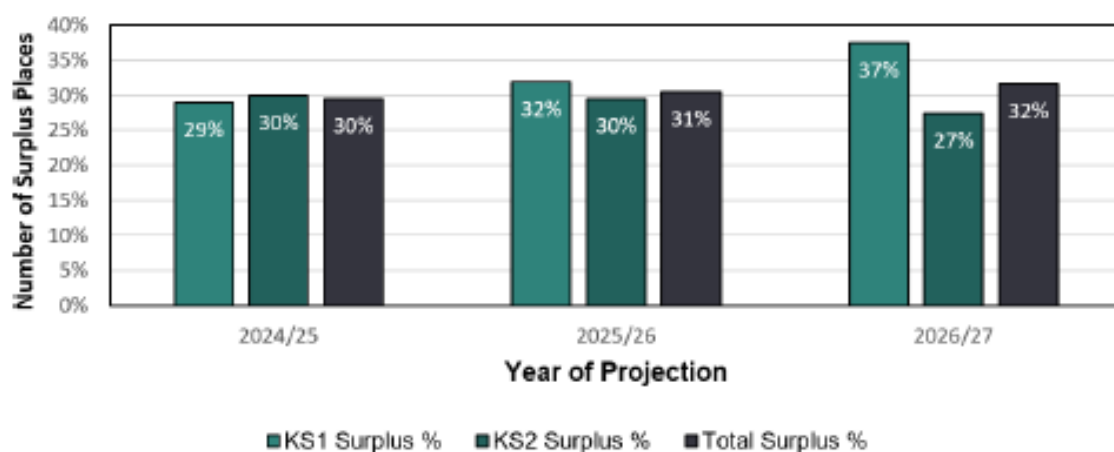
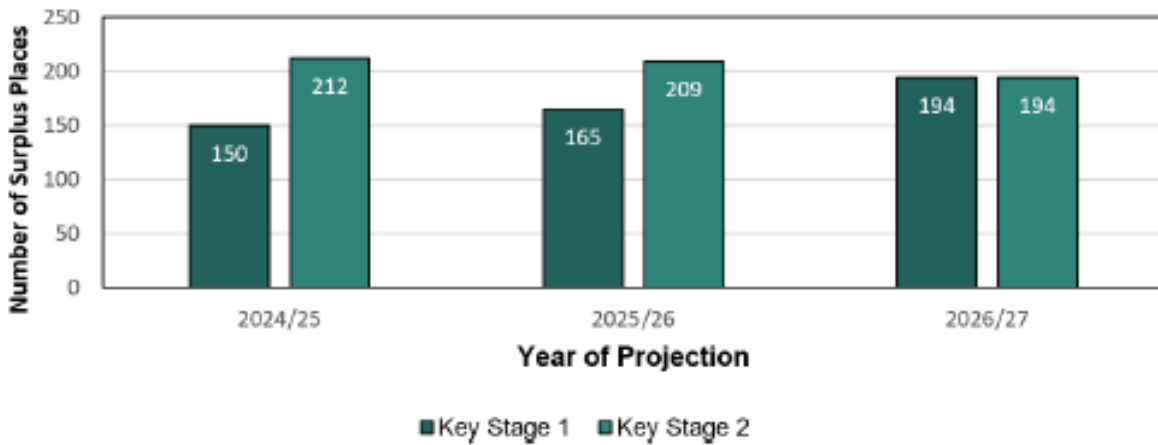




Chart B - Projected Number of Surplus Primary School Places in the Walney Island Area



Financial Viability

School budgets are directly linked to the number of children on roll at that school. Many costs are fixed regardless of pupil numbers, and it follows that, where the numbers on roll at a school are decreasing, there is less money available to the school to support teaching and learning. This makes it increasingly challenging for a school to provide a broad and balanced quality educational offer.

Whilst the school has taken a number of measures to reduce costs over the years, the impact of the falling pupil roll has made balancing the budget very challenging with no potential to address projected deficits.

Quality of Education

The Local Authority recognises that it is to the credit of the school's leadership, staff, parents and pupils that the school has continued to provide a quality educational offer during what has proven to have been a challenging period for the school.

However, the Local Authority is concerned that the school's current financial position is increasing the workload on school staff to levels that the Council believes is reaching an unsustainable level. This will inevitably impact on teaching standards and would likely give a reduced rating under the current Ofsted inspection framework.

The current framework requires all schools to evidence a 'good' quality of education over time, demonstrating a broad, rich curriculum sequenced in a logical progression to enable all children to acquire the intended knowledge and skills from Reception to Year Six.

The Local Authority is concerned that staffing instability and funding have also hampered development of leadership at subject level and impacted on professional development, workload and well-being of staff.

We are consulting on the following proposal:

Proposal to close North Walney Primary and Nursery School on 31 August 2024.

Who is this consultation for?

This document is for parents, staff and governors of North Walney Primary School and everybody with an interest in education in the area.

Where can I find out more information about this proposal?

You can find out more information by:

- Following the attached link to the Frequently Asked Questions document that is available on the Council's website.
<https://legacy.westmorlandandfurness.gov.uk/childrenservices/schoolsandlearning/1ss/school-organisation/Consultations.asp>
- Attending one of the consultation meetings that will be held at the school on Wednesday 8th November 2023. Times are set out below.

How can I make my views known?

In addition to completing the online questionnaire using the link below you can attend a consultation meeting. This will be held on Wednesday 8th November 2023 at North Walney Primary School. There will be separate meetings for the staff, governors, parents and other stakeholders at the times below. Representatives from the Local Authority will be available to answer any questions that you might have

- School Staff only - 4pm to 5pm
- Governors only - 5.15pm to 6.15pm
- Parents & other stakeholders - 6.30pm to 7.30pm

What happens next?

Once the consultation period has closed, the Council's Cabinet will receive a report summarising all the responses that have been received. Cabinet will then decide whether to proceed to with the proposal or not to progress. Following the Cabinet decision, any decision affecting the school will be published with a further four-week representation period.

At the end of that representation period, the Cabinet will again consider all responses that have been submitted and will then make a final decision.

It is important that the Council's Cabinet gets to hear your views.

This consultation runs for six weeks from 1 November 2023 until 12th December 2023.

To respond to the consultation you can complete the online questionnaire here: <https://consult.westmorlandandfurness.gov.uk/education/consultation-on-a-proposal-to-close-north-walney-p/>, or, send your comments either by via email school.organisation@cumbria.gov.uk, or post to: School Organisation, Westmorland and Furness Council, Post Box 305, LA9 9GZ. Please explain your reason for interest in the proposal.

Please note:

It is not possible to respond to individual correspondence, but Westmorland and Furness Council will ensure that all points raised during the consultation process are addressed in the post-consultation report.

All comments received as part of the consultation process will be re-produced in the post consultation report. All comments will be redacted so that individuals cannot be identified, unless the individual or individuals hold a formal position that needs to be clearly identified.

Consultation Meeting Slides

North Walney Proposal Consultation Meeting 8 November 2023

westmorlandandfurness.gov.uk



Welcome and Introductions



Proposal Details



The Proposal

- This consultation is about the potential closure of North Walney Primary and Nursery School.
- The Local Authority recognises that it is to the credit of the school's leadership, staff, parents and pupils that the school has continued to provide a quality educational offer during what has proven to have been a challenging period for the school.
- The Council is concerned about the increasing pressure upon both the school's leadership and staff to continue to provide a quality educational offer given the decline in the number of pupils at the school and the impact on the school's financial position.
- The Council considers that it has a responsibility to all members of the North Walney School community to formally consult on the school's future sustainability.



The Proposal

- Part of this process is to seek the views of everybody that has an interest in the school. Westmorland and Furness Council wants to hear your views.
- If, following consultation, the proposal is approved, it is proposed that the school would close on August 2024.



Rationale



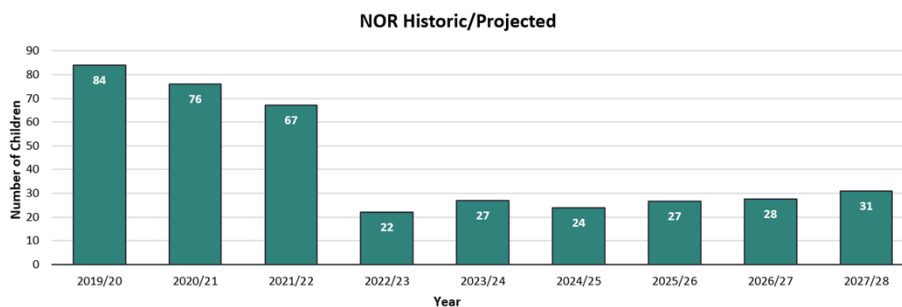
Current Class Size vs Published Admission Number

Year Group	PAN	Current Class Size
Reception	23	3
Year 1	23	3
Year 2	23	8
Year 3	23	1
Year 4	23	4
Year 5	23	2
Year 6	23	6
Total	161	27

As of September 2023, the confirmed number of pupils on roll at North Walney Primary School was 27. The total capacity of the school based upon the current published admission number is 161.



Historic and Forecasted Data



- There has been a continuous drop in numbers across all year groups over recent years.
- In 2018/19 the number on roll was 84, by 2021/22 this number had fallen to 67 with a further reduction to 22 by 2022/23.
- The number on roll is predicted to remain very low in forthcoming years.
- Capacity is forecasted to remain at less than 25% of the potential capacity for the school for the forecasted period.



Historic and Forecasted Data

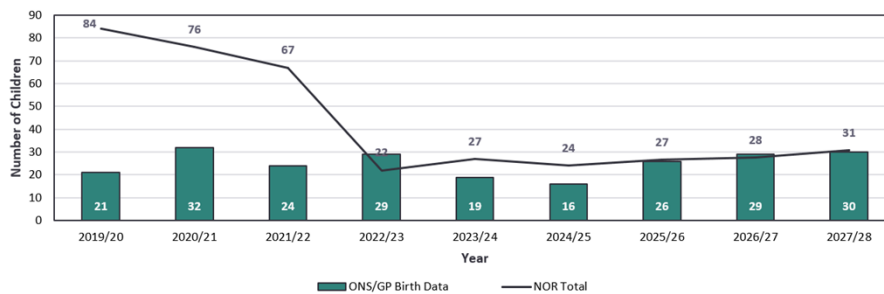
North Walney Primary School	Historic				Current 2023/24	Forecast				
	2019/20	2020/21	2021/22	2022/23		2024/25	2025/26	2026/27	2027/28	2027/28
Reception	12	10	9	2	3	3	5	5	4	
Year 1	11	9	8	5	3	3	3	5	5	
Year 2	9	11	5	1	8	3	3	3	5	
Year 3	13	10	12	3	1	8	3	3	3	
Year 4	11	13	10	1	4	1	8	3	3	
Year 5	12	11	13	6	2	4	1	8	3	
Year 6	16	12	10	4	6	2	4	1	8	
Totals	84	76	67	22	27	24	27	28	31	

- The projections are produced by combining current class size data with live birth predictions generated by well-respected national organisations.
- For the forecasted period 2024 to 2027, the data being utilised is provided by the ONS.
- To develop the projection for 2028, we have utilised GP Registration data as provided by the Department for Education. This is taken from the NHS Primary Care Registration Database.



Historic and Forecasted Data

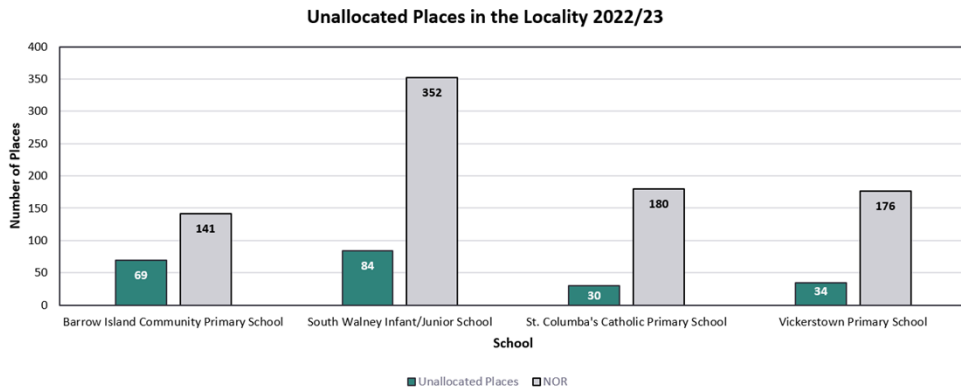
Birth Data and NOR Historic/Projected



- The forecast suggests the number of births will stay relatively static for this catchment area.
- The number on roll remains below a quarter of the potential capacity for the school for the forecasted period.
- The birth data does not display any significant demographic developments in the forthcoming years.



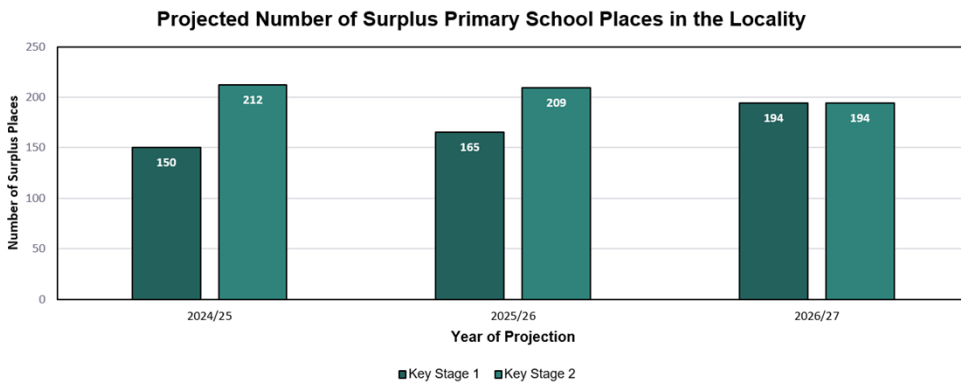
Current Capacity in the Locality



- At the time of forecasting not all of the schools' current NOR was available. The remaining data comes from projections developed in January 2023.
- There remains substantial capacity in the vicinity to cope with predicted demand.



Projected Capacity in the Locality



- These are the predicted surplus of places from the schools in the Walney Island vicinity. The projection uses January 2023 data.
- More than a quarter of places in nearby schools are forecasted to remain unallocated in upcoming years.



Capacity in the Locality

North Walney Primary School	Forecast			
	2023/24	2024/25	2025/26	2026/27
Projection	27	24	27	28
Housing 5-year plan	0	0	0	0
Projections plus 5-year plan	27	24	27	28
Housing S106	0	0	0	0
Projections plus S106	27	24	27	28

- Our projection model allows for a child yield from housing developments to be included in the forecasting.
- No housing developments are currently being undertaken in the North Walney catchment area.
- No significant housing developments are currently being undertaken on Walney Island more generally.



Funding

- The number of children on roll is inextricably linked to the school budget.
- A decline in number on roll directly leads to reductions in finance being available to actively support the teaching and learning in school.
- Many costs that schools face are fixed no matter how many pupils they have, for example, site costs.
- North Walney needs to maintain a site which has capacity for 161 pupils but is only funded for 27 pupils.
- The school's leadership have made significant efforts to reduce costs but despite this a significant budget deficit of £160,930 developed by March 2023.
- The three-year budget plan predicts that the deficit will continue to increase due to low pupil numbers.



Educational Quality

- The financial position is impacting school staff due to increasing the workload on school staff.
- Inevitably, this will in time impact the efficacy of the education provided despite the ongoing efforts of the school leadership and its staff.
- The current framework requires all schools to evidence a 'good' quality of education over time, demonstrating a broad, rich curriculum sequenced in a logical progression.
- The level of staffing instability and reductions in funding have potentially hampered the development of leadership at a subject level.
- It has also affected professional development, workload and well-being of the staff.



Timetable – Consultation and Statutory Process

Consultation Period	01 November 2023 – 12 December 2023
Consultation Meeting School Staff: 4:00pm – 5:00pm Governors: 5:15pm – 6:15pm Parents & Stakeholders: 6:30pm – 7:30pm	08 November 2023
Barrow Locality Board	28 November 2023
Cabinet for Publication of Notice	23 January 2024
Representation Period (statutory)	February 2024 (4 weeks)
Cabinet for Final Decision	26 March 2024
Implementation Effective From	31 August 2024



Advice and Support for School Staff

- The Local Authority understands that the staff will be concerned about the proposal and what it means for them personally and professionally. We understand that this is a difficult time for those involved and your wellbeing is of the utmost importance.
- We will be listening very carefully to the views of staff and their representatives, to ensure that all staff are given appropriate advice and support depending on their individual circumstances
- Whilst not wanting to pre-empt the outcome of any consultation, initial one to one meetings will be offered to each staff member to discuss their current position. This will continue throughout the process and can be requested at any time.



Advice and Support for School Staff

Depending on the individual requirements of staff members packages of support may include the following:

- Well-being support and guidance
- Careers advice and skills development
- Pension advice and support around financial planning
- Redundancy estimates
- If the Council takes the final decision, on 26 March 2024, to close the school then the Local Authority will commence with a further Human Resources consultation in accordance with relevant policies, procedures and statutory timescales.



Advice and Support for Parent and Pupils

- The Local Authority recognises that pupils and parents will be concerned about this proposal and recognises the responsibility that arises from taking the decision to consult on a proposal to close a school.
- The school will continue to run as it currently does during the consultation and decision-making process.
- If the decision is taken in March 2024 to close the school in August 2024, then the Local Authority will contact the parents of all the pupils at the school to discuss their individual circumstances
- Support will be provided to assist parents in applying for new school places, discuss their transport arrangements and ensure that all children are supported to transition to their new school.



How to respond to the consultation?

- This consultation runs until 12 December 2023.
- Notes are being taken at this evening's consultation meetings. All questions and responses will be included in the post-consultation report that will be presented to Cabinet in December 2023.
- You can complete the online questionnaire by following the link, below, as set out in the consultation leaflet:

<https://consult.westmorlandandfurness.gov.uk/education/consultation-on-a-proposal-to-close-north-walney-p/>

Please take the time to let us know your views on this proposal.



Thank you for your time.
Questions and comments please.



PROPOSAL TO CLOSE NORTH WALNEY PRIMARY SCHOOL, BARROW-IN-FURNESS

Section 15(1) of the Education and Inspections Act 2006.

1. Name of Proposing Body and the Affected Educational Establishment

Westmorland and Furness Council, School Organisation Team, Westmorland and Furness Council, Post Box 305, Kendal, LA9 9GZ. The school to be discontinued is North Walney Primary and Nursery School, Duddon Drive, Barrow-in-Furness, Cumbria, LA14 3TN. It is a community school.

2. Description of the Proposal

To discontinue the provision of primary and nursery level education at North Walney Primary School from 1 September 2024.

3. Evidence

North Walney Primary School is significantly under-subscribed. There has been a sharp decline in the number of pupils on roll at the school since 2019/20 when the school provided education for 84 children. The number of children on roll in the school at the beginning of the academic year 2023/24 was 27. The school has a capacity of 161 based upon its published admission number.

Births in the North Walney catchment area have reduced in recent years, as they have across Walney Island. Due to fewer children being born, there is little prospect of a significant increase in the number of pupils on roll at North Walney Nursery and Primary School.

In addition, there is little opportunity for pupil growth as a result of inward migration because there are no substantial housing developments planned for Walney Island within the next four-year period.

The Local Authority is concerned about the increasing pressure upon both the leadership and staff of North Walney Nursery and Primary School to continue to provide a quality educational offer given the ongoing decline in the number of pupils at the school and the resulting impact on the school's financial position.

In accordance with the statutory guidance for “Opening and Closing of Maintained Schools’ (January 2023), reasons for closing a maintained school include situations where there is no predicted demand for a school in the medium to long term, there are surplus places elsewhere in the local area which can accommodate displaced pupils and where the school is no longer considered viable. The Local Authority considers that the proposal to close North Walney Nursery and Infant School meets these criteria.

4. Objectives of Proposal

The Council is proposing to close North Walney Primary and Nursery School in order to secure future education provision for children in the Barrow planning area given the current and ongoing risks to the financial, and resulting educational, viability of North Walney Primary and Nursery School.

5. Effect on nearby Educational Institutions

There are four other schools (including South Walney Infant and Junior schools together) within a two-mile radius of North Walney Primary School. Three of them are located on Walney Island and all of them have unfilled places. There is substantial unallocated capacity in the area with more than 30% of primary school places projected to remain unfilled during the academic years 2024/25, 2025/26 and 2026/27.

All of the pupils that were on roll at the school at the time of the consultation can be accommodated at any of the other schools in the area, including at Vickerstown Primary School which is the nearest school to North Walney Primary and Nursery School. Given the availability of places within the area, the proposed closure should not result in increased transport usage as a result of changes to the mode of school travel journeys.

If the proposed is implemented then Local Authority Officers will liaise with staff from North Walney Primary and Nursery school and staff from any receiving schools to ensure that appropriate transition support is in place for children and their families.

All relevant local stakeholders have been asked to provide feedback on the proposal and an equality impact assessment has been undertaken and updated in response to stakeholder feedback.

6. Funding for the Proposal

No additional funding will be required to implement this proposal. However, if the Council's Cabinet decide to approve the proposal for implementation there will be financial implications relating to the school's budget share and cumulative deficit.

The school is funded through the Schools Block of the Dedicated Schools Grant (DSG). Funding is based on the National Funding Formula meaning the majority of the funding is linked to numbers of pupils in school on the October census day. As a result of the falling pupil numbers at the school, funding is also reducing.

The school closed the 2022/23 financial year with a deficit of £0.161m. Any deficit relating to the school at the point of closure will transfer to the Council and be funded from the DSG contingency budget. The school's remaining budget share for the 2023/24 financial year will be used to support any potential redundancy costs arising as a result of closure.

7. Implementation and Any Proposed Stages for Implementation.

The proposed implementation date for the proposal is 31 August 2024.

However, if following the representation period, the Council's Cabinet takes the decision to proceed with the closure the families of children currently attending the school will be supported in finding an alternative school placement during summer term 2024 so that children can make a smooth transition to their new schools from 1 September 2024.

The Local Authority will ensure that support will be provided to assist parents in applying for new school places and appropriate support will be provided to parent regarding transport and uniform provision. Local Authority Officers will also liaise with staff from North Walney Primary and Nursery school and staff from any receiving schools to ensure that appropriate transition support is in place for children and their families.

Teachers and other staff will be offered bespoke packages of support. This may include career advice, skills development, pension advice, financial planning support, and, redundancy estimates in order to enable each member of staff to make the most appropriate decisions about their future based upon their own personal and professional situation.

8. Objections and Comments

Within four weeks of the publication of this notice any person wishing to raise objections or make comments on the proposal may do so in writing to the

School Organisation Team, Westmorland and Furness Council, Post Box 305,
Kendal, LA9 9GZ or by emailing school.organisation@cumbria.gov.uk by 29
February 2024.

draft

PROPOSAL TO CLOSE NORTH WALNEY PRIMARY SCHOOL, BARROW-IN-FURNESS

Notice is given in accordance with section 15(1) of the Education and Inspections Act 2006 that that Westmorland and Furness Council intends to discontinue North Walney Primary School, Duddon Drive, Barrow-in-Furness, Cumbria, LA14 3TN on 31 August 2024.

This notice is an extract from the full proposal. The full proposal can also be viewed on the county council website at:

<https://www.westmorlandandfurness.gov.uk/schools-and-education/school-organisation>

or, on request from Westmorland and Furness Council, School Organisation Team at the address shown below.

Within four weeks of the publication of this notice any person wishing to raise objections or make comments on the proposal may do so in writing to the School Organisation Team, Westmorland and Furness Council, Post Box 305, Kendal, LA9 9GZ.

It is not possible to respond to individual correspondence, but Westmorland or by emailing school.organisation@cumbria.gov.uk by 29 February 2024.

Signed:

Publication date:

Explanatory notes:

All objections made (and not withdrawn in writing within the representation period) will be sent in full to Westmorland and Furness Council's Cabinet. The final decision on whether or not to discontinue education at North Walney Primary School will be made using guidance provided by the Department for Education, by the Cabinet of Westmorland and Furness Council, within two months of the end of the representation period.

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Equality Impact Assessment – School Organisation Change

Consultation on the potential closure of North Walney Primary and Nursery School from 1 September 2024.

Directorate	Children’s Services
Functional Area	Quality, Resources and Transformation
Assistant Director Responsible for EIA	Amy Holliman, Assistant Director, Quality, Resources and Transformation
Functional Area of EIA or Proposal	School Organisation

Aims of the EIA

Purpose of the EIA	To identify any negative impacts to protected groups and associated mitigating actions as outlined below and also any other risks arising from proposal to close North Walney Nursery and Primary School from 1 September 2024.
Summary of findings	<p>There are some potential negative impacts that have been identified.</p> <ul style="list-style-type: none"> • Children currently at the school will need to secure school places at alternative schools in the area. This may result in concerns about disruption to their education and concerns about how children and their families will be supported as the children transition to new settings. • Closure will result in loss, or changes of employment, for staff at the school. <p>It is proposed that these negative impacts can be mitigated by the actions proposed in section 3 below. Any other issues identified during the consultation process will be addressed appropriately at a later stage and added to this assessment.</p>
Scope of the EIA: <ul style="list-style-type: none"> • One directorate • Cross directorate 	<ul style="list-style-type: none"> • One Directorate – Children’s Services • Schools with abutting catchment areas



Westmorland
& Furness
Council

westmorlandandfurness.gov.uk

- Outsourced organisation
- The local community



Phase 1: Gathering information

List examples of background information that you think are **relevant**. If carrying out an assessment of a proposal this section should include the data used to establish whether the proposal has an impact.

Type of information	Findings
The School Organisation (Establishment and Discontinuance of Schools) Regulations 2013	http://www.legislation.gov.uk/ukxi/2013/3109/contents/made
Equality Needs Analysis 2023	https://cumbria.gov.uk/elibrary/Content/Internet/535/609/38323/44648152628.pdf
Cumbria Observatory (Children's Centre Profiles)	North Walney Primary School lies in the Bram Longstaffe Children's Centre Footprint. Profiles of the Children's Centre footprints can be found at: https://www.cumbriaobservatory.org.uk/childrens-centre-footprint-profiles/
Education	Ofsted Inspection Report: June 2019 'Good' https://files.ofsted.gov.uk/v1/file/50089137
Ethnicity	7.5% of all pupils are from a Minority Ethnic background (January 2023 School Census) and there are 86 languages spoken in Cumbria's schools.
Special Educational Needs	Schools monitor pupils by category of Special Educational Need rather than disability. The population of children with different Special Educational Needs is monitored to help ensure we have the provision as well as the policies to meet these needs, thus improving equality of opportunity.
Gender	In line with national data there is an attainment gap between girls and boys at KS1 and KS2. In Cumbria in 2019, the gap between the performance of the boys and girls for reading, writing and maths combined at KS1 was 12.1 percentage points for those achieving the expected standard. For KS2 the gap was 7.5 percentage points for reading, writing and maths combined.
Social Care	The Children's Social Care service collects data on age, gender, ethnicity and disability. Issues arising from an analysis of the information include the proportion of BME and mixed-race children seeking adoption compared to White British families and the supply of BME fosterers and adopters.



Phase 2 Impacts

From the evidence above use this section to identify the risks and benefits according to the different characteristics protected by the Equality Act.

All/general: Any issue that cuts across a number of protected characteristics

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
<p>Overall Deprivation (Index of Multiple Deprivation, measures deprivation across seven domains as follows: Income; Employment; Education, Skills and Training; Health and Disability; Crime; Barriers to Housing and Services; and Living Environment).</p>		<p>Index of Multiple Deprivation (IMD) is from 2019. A decile of 1 refers to the 10% most deprived communities in England, while a decile of 10 refers to the 10% least deprived communities in England.</p> <p>In relation to overall levels of deprivation, the 2019 IMD classified the area where North Walney Primary School is located as sitting within decile 2 (the 20% most deprived of communities in England).</p>	<p>Awareness of issues -action will be taken in accordance with Westmorland and Furness Council (WFC) policies where appropriate. This may included provision of support with new uniform costs, etc if required following discussions with families and staff at North Walney and possible receiving schools.</p>
<p>Geographical Barriers to Services (Sub-Domain of the Index of Multiple Deprivation, which measures physical proximity to essential services)</p>	<p>In relation to geographical barriers to services, the 2019 IMD classified the area North Walney is sitting within lies in decile 10 (within the 10% least deprived of communities in England).</p>		



<p>Impact on education of children from the closure of the school and nursery.</p>	<p>Birth rates in the area are falling and those children moving to alternative schools in the area will help to maintain more viable numbers in those schools.</p>	<p>There are four other schools (including South Walney Infant and Junior schools together) within a two-mile radius of North Walney Primary School. Three of them are located on Walney Island and all of them have unfilled places. There is substantial unallocated capacity in the area with more than 30% of primary school places projected to remain unfilled during the academic years 2024/25, 2025/26 and 2026/27.</p> <p>All of the pupils that were on roll at the school at the time of the consultation can be accommodated at any of the other schools in the area, including at Vickerstown Primary School which is the nearest school to North Walney Primary and Nursery School. Given the availability of places within the area, the proposed closure should not result in increased transport usage as a result of changes to the mode of school travel journeys.</p> <p>There are very low numbers</p>	<p>Support will be given through the process by WFC officers and HR providers.</p>
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		<p>accessing a funded nursery school place at the school with only 2 children projected to attend in summer 2024 term. There are no identifiable gaps in early years provision on Walney Island. Two of the other schools on Walney Island also have nursery classes with places available and there is a PVI childcare provider on the island that has nursery places available. Given this, the proposal to close North Walney Primary and Nursery School would create any issues with childcare sufficiency in the area.</p>	
<p>Employees – potential redundancy/displacements</p>		<p>Staff currently in the school face losing their employment or the disruption of moving to an alternative school.</p>	<p>All school staff will be offered bespoke packages of support. This may include career advice, skills development, pension advice, financial planning support, and, redundancy estimates in order to enable each member of staff to make the most appropriate decisions about</p>



			their future based upon their own personal and professional situation.
Transport	There are a number of alternative schools and nursery providers within walking distance, including four other schools on Walney Island (including South Walney Infant and Junior Schools)		No action required

Disability and health and wellbeing: All forms of disability recognised under the Disability Discrimination Act including sensory impairment, mental health, learning disabilities, mobility related conditions, conditions such as heart disease, diabetes, and asthma. This also covers any impact on health and well being

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
Children with special educational needs.	Funding for children with special needs follow the child.	Transition to a new school environment may prove to be particularly disruptive and unsettling for students with special educational needs.	Officers from the Local Authority will liaise with staff from North Walney and any receiving schools and North Walney to ensure a smooth transition to the new school and that any risk of disadvantage is minimised. The implementation



			of the proposal will be overseen by the Local Authority School Organisation Review Group.
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Gender, Transgender and Marital Status

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
None identified			

Ethnicity: All ethnic groups including Asian, Black, East Asian and white minority ethnic groups, including Eastern Europeans and Gypsy and Travellers.

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
English as an Additional Language (EAL)	There are 86 languages spoken in Cumbria schools, not including English.	4.2% of children in schools in Cumbria are recorded as having an EAL (January 2023 School Census).	No action required.

Sexual Orientation: including heterosexual, gay, lesbian and bisexual people

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
None identified			No action required.

Age: Where a person is at risk of unfair treatment because of their age group

Issue	Positive Impact or benefits	Negative impact or risks	Action Required



None identified			No action required.
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Religion/belief: all faiths including Christianity, Islam, Judaism, Hinduism, Buddhism, Sikhism and non religious beliefs such as Humanism

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
School religious belief	The closure would lessen parental choice to some degree but there would still be a choice between community schools or a Roman Catholic school on the island.		No action required.

Community Cohesion: This is where a decision or a change to services may risk creating tensions between community groups in a local area.

Issue	Positive Impact or benefits	Negative impact or risks	Action Required
Impact on other existing educational institutions locally.	There are four other schools on Walney Island (Vickerstown, St. Columba's and South Walney infant and Junior), whose budgets could be boosted through additional pupil numbers.	All of the pupils that were on roll at the school at the time of the consultation can be accommodated at any of the other schools in the area, including at Vickerstown Primary School which is the nearest school to North Walney Primary and Nursery School. Given the availability of places within the area, the proposed closure should not result in increased transport usage as a result of changes to the mode of school travel journeys.	Local Authority Officers to work with receiving schools to discuss any barriers to smooth transition and agree any actions that may be required. This process will be overseen by the School Organisation Review Group.



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		If the proposed is implemented then Local Authority Officers will liaise with staff from North Walney Primary and Nursery school and staff from any receiving schools to ensure that appropriate transition support is in place for children and their families.	
Impact on the community.	Movement to alternative schools in the area will help to increase the viability of those schools.	<p>On paper this proposal may indicate potential reduction in parental choice on Walney Island. However, there are only small numbers of parents choosing North Walney as their first preference schools in recent academic year and projections do not indicate that this pattern is likely to change during the medium term.</p> <p>There is substantial unallocated capacity in the area with more than 30% of primary school places projected to remain unfilled during the academic years 2024/25, 2025/26 and 2026/27.</p>	No action required.

Phase 3: Action Planning

Based on actions raised in the action required box above

Area for further action	Actions proposed	Lead officer	When	Resource implications	Outcome
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Consultation process	Work to identify inequality issues Ensuring consultation process is as fair, transparent and inclusive as possible	Sharyn Duffey	During planning stage		Equality issues addressed within consultation process
Regular refresh of the EIA throughout the course of the consultation	EIA regularly updated	Lee Turner	Ongoing	None	EIA is accurate and up to date
Update EIA with new information and issues raised from consultation	Following consultation period this EIA will be refreshed to consider inequality issues raised.	Lee Turner	Ongoing	Identified from issues raised	WFC pays due regard to preventing discrimination, promotes equality of opportunity and fosters good relations.
Implementation					

Documents appended to the Equality Impact Assessment

Quality Assurance and EIA completion

Date completed	December 2023
Lead officer	Sharyn Duffey
Have staff been involved in developing the EIA?	
Have community organisations been involved?	
Date of next refresh	This EIA will be updated at key



	<p>points during the consultation, representation stages of the proposal and if the proposed is approved, will be reviewed and updated during the implementation process.</p>
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WESTMORLAND AND FURNESS COUNCIL

Cabinet

Report Title	Determination of 2025/26 Admissions Arrangements for Community and Voluntary Controlled Schools and 2025/26 Co-ordinated Admissions Scheme.
Date of Meeting	23 January 2024
Report Author	Amy Holliman – Assistant Director, Quality, Resources and Transformation
Director	Milorad Vasic – Director of Children’s Services
Lead Cabinet Member	Councillor Sue Sanderson – Children’s Services, Education & Skills
Why is this a key decision?	<p>1. an executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council’s budget for the service or function to which the decision relates. NO</p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are “significant” if they are equal to or greater than £500,000. YES</p> <p>For clarification, no treasury management decision shall constitute a Key Decision</p>
Wards Affected	All Wards
Identify exempt information and exemption category	Not applicable
Reasons for urgency (only where applicable)	Not applicable
Appendices (if any)	<p>Appendix A: Proposed School Admission Arrangements 2025-26</p> <p>Appendix B: Proposed Co-ordinated Admissions Scheme 2025-26</p> <p>Appendix C: Proposed Relevant Area 2025-26</p>

1. Executive Summary

1.1 On 12 September 2023, Cabinet agreed that Westmorland and Furness Council should proceed to consultation on the following:

Proposed School Admission Arrangements for Community and Voluntary Controlled Schools 2025/26 (Appendix A)

Proposed Co-ordinated Admissions Scheme 2025/26 (Appendix B)

Proposed Relevant Area 2025/26 (Appendix C)

- 1.2 In accordance with the provisions of the School Admissions Code 2021, (para 1.46), the consultation was undertaken for a six-week period from 31 October 2023 to 11 December 2023.
- 1.3 Cabinet is requested to review the outcome of the consultation exercise and to approve and determine the Local Authority's proposed Admissions Arrangements for Community and Voluntary Controlled Schools for 2025/26 and the Co-ordinated Scheme for 2025/26.

2. Recommendations

For the reasons set out in this report, Cabinet is recommended to:

- 2.1 In accordance with the School Admissions Code 2021 (para 1.49) approve and determine the proposed admissions arrangements for Community and Voluntary Controlled schools at Appendix A;
- 2.2 Approve the proposed co-ordinated admission scheme for 2025-26 at Appendix B.
- 2.3 Approve, the relevant area' for admission authorities in Westmorland and Furness at Appendix C.

3. Information: the Rationale & Evidence for the Recommendations

- 3.1 Westmorland & Furness Council is the statutory admissions authority for all Community and Voluntary Controlled schools in the LA area of Westmorland & Furness, and as such, must determine its admissions arrangements for the 2025-26 academic year by 28 February 2024.
- 3.2 Admission arrangements for the Community and Voluntary Controlled schools include catchment areas and the criteria that will be applied to the applicants to determine place allocation in the case of oversubscription.
- 3.3 Voluntary Aided, Foundation, Free schools and Academies are 'own admission authority' (OAA) schools. The governing body or academy trust for each individual school is responsible for determining the admissions policy and making decisions about the allocation of places. The Local Authority is not responsible for allocation decisions made by Voluntary Aided, Foundation, Free schools or Academies. The parental information booklets for starting school and transfer to junior and secondary school make clear the distinction between own admission authority schools and those schools to which the Local Authority admissions policy applies.
- 3.4 Where changes are proposed to admission arrangements (or at least every seven years where no changes have been proposed), including reductions in Published Admission Numbers (PANs), the Council is required to consult with:
 - 3.4.1 Parents of children between the ages of two and eighteen;
 - 3.4.2 Other persons in the relevant area which in the opinion of the admission authority have an interest in the proposed admissions;
 - 3.4.3 All other admission authorities within the relevant area (except that primary schools need not consult secondary schools);

- 3.4.4 Whichever of the governing body and the local authority who are not the admission authority;
- 3.4.5 Any adjoining neighbouring local authorities where the admission authority is the local authority; and
- 3.4.6 In the case of faith school, the body of person representing the religion or religious denomination.

(School Admissions Code 2021: paragraph 1.47)

- 3.5 Where the co-ordinated scheme is substantially different from the scheme for the previous year the LA must consult. If the scheme has not changed from the previous year there is no requirement to consult, subject to the requirement that the LA must consult on the scheme at least once every seven years, even if there have been no changes.
- 3.6 There is also a requirement to consult the governing bodies of individual schools on the PAN the Council proposes to use for their school in September 2025 where it is proposed to remain unchanged or to increase.
- 3.7 It should be noted that the admissions policy that is being presented to Cabinet for determination closely mirrors the policy applicable to 2023-24 and 2024-25, which was previously determined by Cumbria County Council.
- 3.8 There is significant scope to make changes to the Council's admissions policy, particularly in terms of the oversubscription criteria used to determine place allocations when there are more applications at any given school than the number of places available. Over the course of the 2023/24 academic year, the Council may wish to review whether the existing Cumbria County Council's policy appropriately reflects the ongoing needs of children and families in the Westmorland & Furness area.
- 3.9 Any review of the existing admissions policy would be a significant task as any changes could fundamentally impact on the pattern of allocation of school places across the County. Given this, it would be necessary to fully model any proposals so that the implications are fully understood by families, schools and elected members prior to being formally consulted upon. This work will be scheduled into the Children's Service's work programme for the 2023/24 academic year with any proposed changes being modelled in time for inclusion in the statutory consultation process during the autumn term 2024, for implementation from September 2026.

Relevant Area

- 3.10 Regulations require each Local Authority to define a 'relevant area' within which own admission authorities (OAA's) must consult on their proposed admissions arrangements.
- 3.11 The relevant area is determined after consultation with local admission authorities and is reviewed periodically and at least every two years. The determination remains in place until there is a subsequent determination.

3.12 The relevant area was last reviewed in autumn 2021. Appendix C sets out the proposed relevant area as consulted upon with relevant schools in Westmorland and Furness in 2023.

4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)

4.1 Priorities. People, Communities, Customers – the proposed admissions policy contributes to the Council Plan priorities relating to people, communities, customers and climate by ensuring that the vast majority of children and families are able to access a school place at their preferred school, within a reasonable distance of home in accordance with the provisions of the School Admissions Code 2021.

5. Consultation Outcomes

5.1 Consultation with all relevant stakeholders as prescribed in section 1.47 of the School Admissions Code, was undertaken during the period 31 October 2023 to 11 December 2023.

5.2 The Local Authority received five responses to the consultation exercise, three from parents of pupils attending schools within the Westmorland and Furness Area and two from members of staff at schools within Westmorland and Furness Area. One respondent was in support of the arrangements, two did not make specific comments, a fourth respondent raised a query about what changes are being proposed and a fifth respondent queried why the admissions number for their child's school is not being increased.

5.3 Officers from the School Admissions Team have responded directly to the fourth and fifth respondents regarding their individual queries.

6. Alternative Options Considered

6.1 Cabinet could request amendments to the proposed admissions arrangements, co-ordinated scheme and/or relevant area but any proposed changes could not be consulted upon now within the relevant statutory timeframe.

6.2 Cabinet can request that suggestions for changes received as part of the consultation can be incorporated in any review that is undertaken in preparation for consultation on 2026/27 admission arrangements. However, no proposed changes have been suggested in response to the consultation on the proposed 2025/26 admissions arrangements.

7. Financial Implications and risk

7.1 There are no direct financial implications arising from the recommendations to approve the proposed admissions policies or to consult on the proposed admission scheme.

8. Legal and Governance Implications

- 8.1 As per Part 2, Section 4, para 1 of the Constitution, Cabinet can approve/reject the recommendations in this report as it sees fit. In making these decisions Cabinet should note -
- 8.2 The School Admissions Code 2021 ('the Code') imposes mandatory requirements in relation to the discharge of functions relating to admissions. The LA as the admission authority for Community and Voluntary Controlled schools in Westmorland and Furness has a statutory duty to act in accordance with the relevant provisions of the Code. Failure to determine admission arrangements for Community and Voluntary Controlled schools in Westmorland and Furness and to formulate a co-ordinated scheme for all maintained schools and academies in Westmorland and Furness for 2025-26 would mean that the LA does not fulfil its statutory duty in relation to the admissions function.
- 8.3 Recommendation 2.1: When changes are proposed to admission arrangements, all admission authorities must consult on their admission arrangements (including any supplementary information form) that will apply for admission applications the following school year. Where the admission arrangements have not changed from the previous year there is no requirement to consult, subject to the requirement that admission authorities must consult on their admission arrangements at least once every seven years, even if there have been no changes during that period.
- The requisite consultation has now been carried out.
- 8.4 Recommendation 2.2: There is no statutory obligation to consult on the co-ordinated scheme unless the scheme is substantially different from the scheme adopted for the previous academic year, subject to the requirement that the local authority must consult on the scheme at least once every seven years, even if there have been no changes during that period.
- The requisite consultation has now been carried out.
- 8.5 Recommendation 2.3: Regulation 6 of the Education (Relevant Areas for Consultation on Admission Arrangements) Regulations 1999 sets out who the local authority is compelled to consult with in respect of a change to the relevant area/s it is proposing.
- The requisite consultation has now been carried out.
- 8.6. In respect of the consultations, Cabinet must carefully consider the responses received back before making any decision on implementation. Cabinet must give due regard to the outcome of the consultation/s but is not obligated to follow the dominant view.

9. Human Resources Implications

- 9.1 There are no human resource implications arising from this report.

10. Equality and Diversity Implications (including the public sector equality duty, Armed Forces Families, Care Leavers and Health inequalities implications)

- 10.1 Westmorland and Furness Council is required to consult upon and determine its admissions policy and associated admissions arrangements in accordance with the provisions of the School Admissions Code 2021.
- 10.2 The proposed admissions policy and admission arrangements for 2025/26 have not been screened given that it mirrors the former Cumbria County Council policy, which has traditionally ensured that well over 95% of families are able to access a place at their first preference school.
- 10.3 Any proposal to make changes to the future admissions arrangements for 2026/27 would be subject to full consultation, which would include the completion of a full Equality Impact Assessment (EIA).

11. Background Documents

- 11.1 List documents here that you used as background in the preparation of your report but are not attaching as appendices – you do not need to attach them. If such documents contain exempt information (e.g. external legal advice) you can mark them as exempt but must identify the ground for exemption – as above)

School Admissions Code 2021

Cabinet Report – 12 September 2023 Item 16 – 2025-2026 School Admission Arrangements

Proposed Policy for the Admission Arrangements to Community and Voluntary Controlled Schools for 2025-2026 in Westmorland & Furness

Introduction

These are the 2025-2026 admission arrangements for community and voluntary controlled primary and secondary schools, i.e. those schools where the Local Authority (LA) is the admission authority.

1. Co-ordinated Admission Arrangements

In line with current legislation, the LA has drawn up a separate scheme to co-ordinate admissions to maintained schools and academies within the local Authority area of Westmorland & Furness for the main admissions round.

2. Published Admission Numbers

The admission number the LA will publish for each community and voluntary controlled school is shown in Appendix 1.

3. The General Admissions Policy for 2025-2026

The General Admissions Policy will be used to allocate places at those schools which are oversubscribed. This is attached as Appendix 2 for entry to Reception, Year 3 and Year 7 and as Appendix 3 for entry to Year 12.

4. Address to be Used in Determining Priority for Admission

If a school is oversubscribed, the address of the parent or carer with whom the child normally lives will be used in the allocation process. Where a child's address is difficult to determine, for example where shared living arrangements are in place, in most circumstances, the address of the parent or carer claiming child benefit will be used.

In some circumstances, the LA may also suggest that parents or carers seek independent legal advice and ask that they provide copies of any relevant court order relating to child arrangements.

Residency at a particular address is a key factor in allocating places at oversubscribed schools. If you move house you **must** contact the LA to provide details of the new address. For the application to be considered on the basis of the new address, documentary evidence will need to be provided. The LA will need to be satisfied that you will be resident at this new address on national offer day and at the time that your child would be admitted to the school that you are applying for. LA representatives may visit the address given as the child's residence to verify that he/she lives there.

5. Fraudulent Applications and Withdrawal of a School Place

The LA will not withdraw an offer of a place unless it has been made in error or it is established that the offer was obtained through a fraudulent or misleading application. An application will not be withdrawn because an offer was made in error once the student has taken up the place at the school. Where an offer is withdrawn on the basis of fraudulent or misleading information, the application will be considered again on the basis of the correct information, and parents or carers will have a right of appeal where no place can be offered.

Where parents or carers are found to have made a fraudulent application for a school place but the LA decides that it is not in the best interest of the child to withdraw the place, should a school place be sought for any other sibling or siblings the criteria that provide a higher priority for a school place for siblings will not be applied.

Where a place has been offered on the basis of a timely parental application, the place will not be withdrawn unless one of the exceptions set out in paragraph 2.13 of the School Admissions Code 2021 applies:

- An admission authority **must not** withdraw an offer unless:
 - i) it has been offered in error;
 - ii) a parent or carer has not responded within a reasonable period of time; and
 - iii) it is established that the offer was obtained through a fraudulent or intentionally misleading application.

6. Parental Disagreement

The management of school applications may be severely delayed during the main admissions round where separated parents or carers of the child each submit a separate application for different schools. The School Admissions Code 2021 states that only one offer per child can be made by the LA. In this situation the LA asks that parents or carers attempt to resolve matters between themselves and inform the LA in writing of which application should be processed. The LA will not become involved in private disputes.

In a situation where parents or carers are unable to reach an agreement the LA will decide which application should be processed. In most circumstances the LA will process the application submitted by the parent or carer who is in receipt of child benefit for the child to whom the application relates. In some circumstances, the LA may also suggest that parents or carers seek independent legal advice and ask that they provide copies of any relevant court order relating to child arrangements.

7. The Admissions Timetable

The timetable for the September 2025 application and allocation processes for entry to Reception in an infant or primary school, Year 3 in a junior school and Year 7 in a secondary school will be in line with the co-ordinated admissions scheme.

8. Late Applications

For all schools, applications which are received or changed after the published closing date will only be considered in exceptional circumstances. Even if there are exceptional circumstances, applications submitted after the relevant published date, contained within

the co-ordinated admission scheme, will not be considered until after allocations for those parents or carers who applied on time have been made. Any evidence submitted after the relevant date to support a late application or change of preference will not be considered. Affected applicants will not receive an offer with other parents on national offer day, instead receiving one on 're-allocation day'.

Details of closing dates, and other relevant dates can be found:

- i) in the parental information booklets for admission to an infant or primary school, transfer to junior school and transfer to secondary school in September 2025;
- ii) in the 2025-26 co-ordinated admissions scheme for all maintained schools and academies in the local authority area of Westmorland and Furness; and
- iii) on the county council website www.westmorlandandfurness.gov.uk

9. Waiting Lists

In the main admissions round the LA will maintain a waiting list for each community and voluntary controlled primary and secondary school, i.e. those schools where the LA is the admission authority, until 31 December of the normal school year of admission.

Once places have been allocated, children refused a place will continue to be considered for any vacancies which become available up until 31 December of the normal year of admission.

Each child that is added to the list will require the list to be ranked again in line with the published oversubscription criteria. Priority will not be given based on the date that the application was received or the name was added to the waiting list. Vacancies will always be allocated by applying the determined admissions arrangements and length of time on the waiting list will not be a consideration.

If a request for an in-year school place is refused, parents and carers can request that the child's name be added to a waiting list. The request must be submitted in writing, by letter or e-mail. If a place becomes available, it will be allocated using the oversubscription criteria set out in the LA's general admissions policy (Appendix 2). The child's name will remain on the waiting list until the end of the academic year in which the request for the school place was submitted. To re-apply to remain on the waiting list for the following academic year, parents and carers will need to contact school admissions again by e-mail or in writing; e-mail: school.admissions@westmorlandandfurness.gov.uk

10. Early, Deferred or Delayed Entry to all Schools and Part Time Attendance at Infant/Primary Schools

Children are entitled to a full-time place in the September following their fourth birthday but if a child who has not reached compulsory school age has been allocated a Reception place and their parent or carer wishes to defer entry to school, the place will be held open. Entry cannot be deferred beyond the point at which the child reaches compulsory school age and not beyond the beginning of the final term of the school year for which the place was allocated. Parents or carers can request that their child takes up the place part-time until the child reaches compulsory school age.

Summer-born children (children born between 1 April and 31 August) do not attain compulsory school age until the September after they would normally start school in Reception. In line with government recommendation, the LA as the admission authority for **community and voluntary controlled schools** will admit these children into a Reception

class a year later than usual at their parents' or carers request. These children will remain eligible for their full entitlement to schooling, and will subsequently transfer to junior (where applicable) and secondary school with other children in the year group in which they have been educated, rather than with their 'chronological cohort'.

Where a summer-born child is allocated, and takes up a September Reception place, in the normal year of admission (i.e. the beginning of the academic year in which they turn 5) then subsequently attends school beyond the end of the autumn term of the admission year, an application for a Reception place for the following September will not be considered as a 'summer-born' application. In this situation the child has already commenced school and any request to be admitted out of the normal year group will be considered on its individual merits.

Other requests, for early or delayed transfer to secondary school, for example, will be considered on their individual merits and in line with the provisions of the School Admissions Code 2021. Unlike delayed entry for summer-born children, others have no automatic right to education outside of their chronological age group, although there is no legal bar to this.

Parents or carers seeking early transfer should submit their request to school admissions by 30 September for secondary applications, and by 31 October for primary applications **in the year before** that in which they would usually apply. This will allow time for the application to be considered prior to the closing date for applications. Parents or carers will still need to submit preferences by the appropriate closing date.

Parents or carers seeking delayed entry to school or transfer to a junior or secondary school should submit their request by the same dates in the year in which they would apply if their child was transferring at the usual age. This will allow consideration of the request prior to the closing date for preferences to be submitted, allowing parents or carers sufficient time to submit preferences in the event their request is denied.

11. Twins and Siblings of Multiple Births

Where places are available for some but not all children from multiple births (including twins) the LA will exercise the discretion offered by the School Admissions Code 2021 to offer all of the children a place. Where this results in an infant class exceeding 30 pupils, additional children admitted under these arrangements will be treated as 'excepted pupils' for the duration of their infant education and will not constitute a breach of legislative requirements.

12. Siblings

Siblings of children attending their catchment area school have a higher priority for admission when places are allocated at oversubscribed community and voluntary controlled schools. Expressing a preference for a school other than the catchment school may result in there not being places available for younger siblings when they are due to start school. Catchment children will have a higher priority for places than children living outside of the catchment area, including those children living outside the catchment area with siblings that already attend the school.

Siblings are brothers or sisters living at the same address and includes step and foster children.

13. Children Previously Looked After by a Local Authority and Children Previously Looked After outside England

1) Children Previously Looked After by a Local Authority

Children previously looked after are children who were looked after but have ceased to be so because they were adopted (under the terms of the Adoption and Children Act 2002) or became subject to a Child Arrangements Order or Special Guardianship Order (Children Act 1989).

For a previously looked after child to be considered under category 1 of the LA General Admissions Policy, the parent or carer will need to provide appropriate written evidence to support the application. It is the responsibility of the parent or carer to provide appropriate documentary evidence with the application; without this it **will not** be possible to consider the application under category 1 of the LA General Admissions Policy.

2) Children Previously Looked After outside England

Current advice issued by the Department for Education (DfE) in July 2021 states that a child previously looked after outside of England is one that was looked after, outside England, by a public authority, a religious organisation or another provider of care whose sole purpose is to benefit society.

For a child previously looked after outside England to be considered under category 1 of the LA General Admissions Policy, the parent or carer will need to provide appropriate written evidence to support the application, for example, a UK adoption order or a copy of the adoption order from the child's county of origin (to be updated as appropriate). It is the responsibility of the parent or carer to provide the appropriate documentary evidence with the application; without this it **will not** be possible to consider the application under category 1 of the LA General Admissions Policy.

For further information, please contact the School Admissions Team:

- E-mail: school.admissions@westmorlandandfurness.gov.uk or Tel:

14. Children of UK Service Personnel (UK Armed Forces) and Crown Servants

Any admission requests received for children of UK service personnel and crown servants will be processed in line with the School Admissions Code 2021, paragraph 2.21.

For further information, please contact the School Admissions Team:

- E-mail: school.admissions@westmorlandandfurness.gov.uk or Tel:

15. Admissions to Nursery Schools and Infant/Primary Schools Offering Nursery Education

These arrangements do not apply to the admission of nursery pupils. Nursery admission arrangements will be determined separately. **Attendance at a school's nursery does not guarantee admission to the school's Reception group.**

All parents or carers of children who are due to start school will need to complete and submit an application (online or Form SA1) for a Reception place at the preferred school by the appropriate closing date.

16. Transfer from Infant to Junior/Primary Schools

Attendance at an infant school does not guarantee admission to the associated junior school.

All parents or carers of children in Year 2 at a junior school will need to complete and submit an application (online or Form SA2) for a Year 3 place at the preferred school by the appropriate closing date.

17. Admission to School Sixth Forms

These arrangements apply to the admission of students to school sixth forms (Year 12).

18. Catchment Areas

Westmorland and Furness County Council operates a 'catchment area' approach to school admissions. **Most** (not all) schools have a defined catchment area. Details of the arrangements for each school can be made available on request. Where an area is not included within an agreed catchment area, the "catchment area school" will be the nearest school to the parental home.

Any enquiries regarding catchment areas in relation to the allocation of school places should be directed to the School Admissions Team:

- E-mail: school.admissions@westmorlandandfurness.gov.uk or Tel:

19. Distance Measurements

1) Straight-line Measure

Where there are more applications than places available at a community or voluntary controlled school for entry to all year groups, applications will be prioritised using the criteria set out in Appendix 2 and Appendix 3. For any criteria that gives priority to those living closest to the school, distance measurements will be undertaken using the LAs computerised Geographical Information System (GIS). This measurement will be a straight-line measurement between the centre of the pupil's home address and a common point on the school site as determined by the LA.

2) Shortest Walking Route by Road

Where a place cannot be offered at any of the parents or carers' preferred schools, the LA will allocate a place at the nearest school in the local authority area of Westmorland and Furness to the home address with a place available after all timely applications have been processed. In these circumstances, the distance will be measured by the shortest walking route by road between the pupil's home address and the nearest available entrance on the school site, using the LA's GIS mapping system.

20. In-Year Admissions

- 1) The LA is the admissions authority for all community and voluntary schools in the local authority area of Westmorland and Furness. A list of community and voluntary schools is attached as Appendix 1.

- 2) Applications for an in-year place at a community or voluntary school **must** be made by completing the application Form SA8.
- 3) Parents/carers can find a copy of the Form SA8 on the county council website at: www.westmorlandandfurness.gov.uk or by contacting the School Admissions Team, e-mail: school.admissions@westmorlandandfurness.gov.uk or tel:
- 4) The completed Form SA8 **must** be returned to the LA School Admissions Team for processing. Completed forms can be returned by post or by e-mail.
- 5) On receipt of an in-year application, the LA School Admissions Team will contact the preferred school(s) regarding the availability of a place in the relevant year group.
- 6) The outcome of the application will be notified to the parent/carer within 10 school days.
- 7) Where an application for a place is offered and accepted, arrangements will be made for the child to start school as soon as possible. The parent/carer will be advised to contact the school to make the necessary arrangements for admission.
- 8) Where an application for a place is refused, the reason for the refusal will be set out in the letter and information about the right of appeal will also be provided.
- 9) Parents/carers who are refused a place at the preferred school(s) can request that their child's name be added to a waiting list to be considered should a place become available in the relevant year group at the school. For more information about waiting lists maintained by the LA please refer to section 10 of these arrangements.
- 10) If the LA receives a number of in-year requests for places at a particular school and there are insufficient places to offer a place to all applicants, the place or places that are available will be allocated in line with the determined admission arrangements.

Where a parent or carer wishes to change school for their child there may be circumstances when the LA may not offer a place at a community or voluntary controlled school before the first day of the term following receipt of Form SA8 (request for an in year school place). However, wherever possible, when a place has been offered, arrangements for admission to the school will be made as soon as possible.

Any place offered must be taken up within 6 (school) weeks or it may be withdrawn and offered to another applicant.

Determined 2025-2026 Admission Arrangements for Community and Voluntary Controlled Schools – Published Admission Numbers

The following are the proposed admission numbers the LA will publish for each community and voluntary controlled school as part of its 2025-2026 admission arrangements.

Infant/Primary Schools

School	Proposed 2023/2024 Published Admission Number	School	Proposed 2023/2024 Published Admission Number
Allithwaite CE (wf)	15	Levens CE (wf)	15
Armathwaite (wf)	10	Lindal and Marton Primary (wf)	12
Asby Endowed (wf)	6	Lindale CE (wf)	12
Barrow Island Community Primary (wf)	30	Long Marton Community Primary (wf)	10
Bolton Primary (wf)	8	Low Furness CE Primary (wf)	17
Brisbane Park Infant (wf)	54	Milburn (wf)	5
Brough Community Primary (wf)	15	Milnthorpe Primary (wf)	30
Broughton in Furness CE (wf)	15	Newbarns Primary (wf)	60
Brunswick (wf)	45	Newton Primary (wf)	10
Burlington CE Primary and Nursery (wf)	10	North Walney Primary (wf)	23
Cambridge Primary (wf)	30	Old Hutton CE (wf)	15
Cartmel CE Primary (wf)	10	Ormsgill Primary (wf)	30
Chapel Street Infants (wf)	52	Pennington CE (wf)	30
Clifton (wf)	12	Plumpton (wf)	15
Coniston Primary (wf)	14	Ramsden Infant (wf)	52
Croftlands Infant (wf)	60	Roose (wf)	30
Dane Ghyll Community Primary (wf)	30	Sedbergh Primary (wf)	30
Goodly Dale Community Primary (wf)	14	Sir John Barrow (wf)	30
Grange CE Primary (wf)	30	Skelton (wf)	15
Greystoke (wf)	9	South Walney Infant (wf)	60
Hawkshead, Esthwaite Primary (wf)	10	St George's CE (wf)	30
Heron Hill Primary (wf)	60	Staveley CE (wf)	20
High Hesket CE (wf)	25	Storth CE (wf)	10
Holme Community (wf)	15	Temple Sowerby CE Primary (wf)	8
Kirkby Stephen Primary (wf)	30	Vicarage Park CE Primary (wf)	30
Kirkby Thore (wf)	12	Vickerstown (wf)	30
Kirkoswald CE (wf)	13	Victoria Infant & Nursery, Barrow (wf)	75
Langwathby CE Primary (wf)	30		

Junior Schools

Croftlands Junior (wf)	60	North Lakes (wf)	57
George Romney Junior (wf)	45	South Walney Junior (wf)	64
Greengate Junior (wf)	60		

Secondary Schools – Year 7

Dowdales (wf)	210	Lakes School, The (wf)	129
John Ruskin (wf)	48	Ulverston Victoria High (wf)	186

Secondary Schools – Year 12

Lakes School, The	25	Ulverston Victoria High School	50
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The numbers for Year 12 represent the number of pupils that may be admitted to Year 12 from an **alternative** school.

**WESTMORLAND AND FURNESS COUNCIL
GENERAL ADMISSIONS POLICY 2025/2026
Community and Voluntary Controlled Schools**

Where there are more applications than places available at a community or voluntary controlled school for entry to all year groups **except Year 12**, applications will be prioritised using the criteria below. They will be applied in conjunction with explanatory notes 1 – 7 which form part of the policy.

1. Children looked after, i.e. in public care, giving priority, if necessary, to the youngest child(ren); children who were previously looked after; and children who were previously looked after outside of England - see note 1.
2. Children living in the catchment area who have brothers or sisters in the school (or associated infant or junior school) at the time of admission - see notes 2, 3 and 4.
3. Children living outside the catchment area who, at the time of their admission, have brothers or sisters in the school (or associated infant or junior school) who were allocated a place at that school by the Local Authority either (a) in the absence of a place being available in the catchment area school due to oversubscription and the school was identified by the Local Authority as the next nearest with a place available or (b) the school is named in the sibling's Education, Health and Care Plan (EHCP) - see notes 2, 3 and 5.
4. Other children living in the catchment area giving priority to those living closest to the school, measured by a straight-line measurement between the centre of the pupil's home address and a common point on the school site as determined by the Local Authority - see notes 6 and 7.
5. Children living outside the catchment area who have brothers or sisters in the school (or associated infant or junior school) at the time of their admission - see notes 2, 3 and 4.
6. Children living outside the catchment area, giving priority to those who live closest to the school, measured by a straight-line measurement between the centre of the pupil's home address and a common point on the school site as determined by the Local Authority - see notes 6 and 7.

Applications will be prioritised on the above basis. An exception will be made under the Local Authority's policy for the education of children with special educational needs where a child holds an Education, Health and Care Plan (EHCP), that names the school.

Explanatory Notes

[These notes are part of the policy]

Note 1

A child looked after is a child in public care, who is looked after by a local authority within the meaning of Section 22 of the Children Act 1989. Children previously looked after are children who were looked after, but have ceased to be so because they were adopted (under the terms of the Adoption and Children Act 2002) or became subject to a Child Arrangements Order or Special Guardianship Order (Children Act 1989).

Advice issued by the Department for Education (DfE) in July 2021 states that a child previously looked after outside of England is one that was looked after, outside England, by a public authority, a religious organisation or another provider of care whose sole purpose is to benefit society.

For a previously looked after child to be considered under criteria 1, the parent or carer must provide appropriate written evidence to support the application. Without this evidence it **will not** be possible to consider the application under category 1 of the LA General Admissions Policy.

Note 2

In criteria 2, 3 and 5, priority will be given to those children with the youngest siblings. Brothers and sisters are those living at the same address and includes step and foster children. Priority will only be given where it is known at the time of allocating places that a sibling will be attending the school (excluding a nursery class – see note 4) at the time of admission.

Note 3

Where reference is made to ‘associated’ infant and junior schools this is to describe those situations where infant and junior schools share the same catchment area.

Note 4

Brothers and sisters in the school at the time of admission does not include a brother or sister who will be attending a nursery class that is attached to the school.

Note 5

If a parent or carer believes that they qualify for consideration under criterion 3, they should indicate this on their preference form in the place provided for this purpose.

Note 6

Distance measurements will be undertaken using the Local Authority’s computerised Geographical Information System [GIS]. This measures a straight-line measurement between the centre of the pupil’s home address and a common point on the school site as determined by the Local Authority.

Note 7

Random allocation will be used as a tie-break in categories 4 and 6 to decide who has the highest priority for admission if the distance between the children’s home address and the school is the same. This process will be independently verified.

**WESTMORLAND AND FURNESS COUNCIL
GENERAL ADMISSIONS POLICY (YEAR 12) 2025-2026
Community and Voluntary Controlled Schools**

Where there are more applications than places available in Year 12 at a community or voluntary controlled school, applications will be prioritised using the criteria below. They will be applied in conjunction with explanatory notes – 1 – 5 which form part of the policy.

1. Students (children) looked after and previously looked after, i.e. in public care, giving priority, if necessary, to the youngest child(ren) and students who were previously looked after outside of England – see note 1.
2. Students living in the catchment area who have brothers or sisters in the school at the time of their admission – see note 2.
3. Students living outside the catchment area who, at the time of their admission, have brothers or sisters in the school who were allocated a place at that school by the Local Authority either (a) in the absence of a place being available in the catchment area school due to oversubscription and the school was identified by the Local Authority as the next nearest with a place available or (b) the school is named in the sibling's Education, Health and Care Plan (EHCP) – see notes 2, and 3.
4. Other students living in the catchment area.
5. Students living outside the catchment area who have brothers or sisters in the school at the time of their admission – see note 2.
6. Students living outside the catchment area.

Where there is a need to prioritise places within any of the above criteria except criteria 1, priority will be given to those students who live nearest to the school – see note 4 and 5 overleaf

Applications will be prioritised on the above basis. An exception will be made under the Authority's policy for the education of children with special educational needs where a child holds an Education, Health and Care Plan, that names the school.

Explanatory Notes

[These notes are part of the policy]

Note 1

A child looked after is a child in public care, who is looked after by a local authority within the meaning of Section 22 of the Children Act 1989. Children previously looked after are children who were looked after, but have ceased to be so because they were adopted (under the terms of the Adoption and Children Act 2002) or became subject to a Child Arrangements Order or Special Guardianship Order (Children Act 1989).

Advice issued by the Department for Education (DfE) in July 2021 states that a child previously looked after outside of England is one that was looked after, outside England, by a public authority, a religious organisation or another provider of care whose sole purpose is to benefit society.

For a previously looked after child to be considered under criteria 1, the parent or carer **must** provide appropriate written evidence to support the application. Without this evidence it **will not** be possible to consider the application under category 1 of the LA General Admissions Policy.

Note 2

Brothers and sisters are those living at the same address and includes step and foster children. Priority will only be given where it is known at the time of allocating places that a sibling will be attending the school at the time of admission.

In circumstances where there is an application for more than one child in the family, and it is not possible to offer a place to all of the children concerned, it will be up to the parent or carers to decide whether they wish to accept the place[s] offered. This will also be the case in relation to twins, etc.

Note 3

If parent or carers believe they qualify for consideration under criterion 3, they should indicate this on their preference form in the place provided for this purpose.

Note 4

Distance measurements will be undertaken using the Local Authority's computerised Geographical Information System [GIS]. This measures a straight-line measurement between the centre of the pupil's home address and a common point on the school site as determined by the LA.

Note 5

Random allocation will be used as a tie-break in categories 4 and 6 to decide who has the highest priority for admission if the distance between the children's home address and the school is the same. This process will be independently verified.

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Proposed Co-ordinated Admission Scheme for all Maintained Schools and Academies in the Area of Westmorland and Furness Council 2025–2026

Note: the list of schools may need to be revised to provide for the conversion of some schools to academies or to take account of other school organisational changes.

For the purposes of this document 'school' refers to maintained schools and academies unless otherwise indicated.

1. Introduction

(1) In line with the requirements of the 1998 School Standards and Framework Act (as amended) this scheme has been drawn up by Westmorland and Furness Council to co-ordinate admissions to all maintained schools and academies in the local authority area of Westmorland and Furness, except for entry to Year 12 and for entry to special and nursery schools, regardless of whether the Local Authority (LA), the governing body or the academy trust is the admission authority.

(2) The scheme's purpose is to ensure that, as far as reasonably practicable:

i) Every parent or carer living in the local authority area of Westmorland and Furness who has applied for a place for their child for entry in September 2025 to Reception in an infant or primary school, Year 3 in junior school or to Year 7 at a secondary school in the normal admissions round, receives only one offer of a school place for each child on:

(a) 1 March (or the next working day) for transferring to Year 7 at a secondary school.

(b) 16 April (or the next working day) for starting infant or primary school (Reception year group).

(c) 16 April (or the next working day) for transferring to Year 3 at a junior school.

NOTE: The School Admissions Code 2021 states that for secondary school applications, all offers must be made on the same secondary National Offer Day ie. 1 March or the next working day. For primary school applications, all offers must be made on the same primary National Offer Day i.e., 16 April or the next working day.

ii) Every parent or carer living in the local authority area of Westmorland and Furness who applies for a school place at a school at any other time, except for admission to Year 12 and for entry to special and nursery schools receives only one offer of a place for each child on the following basis:

(a) Applications received after the first day of the school term of the admissions year, and at any other time for entry to the normal year of entry, will be treated as 'in year' admissions.

NOTE: The management of school applications may be severely delayed where separated parents or carers of the child each submit a separate application for different schools. The School Admissions Code 2021 states that only one offer per child is made by the LA. In this situation the LA asks that parents or carers attempt to resolve matters between themselves and inform the LA in writing of which application should be processed. It is not appropriate for the LA to become involved in private disputes.

The LA does recognise that there may be exceptional situations where parents or carers cannot ultimately reach an agreement between themselves and it is, therefore, necessary for the LA to take a decision. Where this is the case, the LA will, if appropriate, advise parents to seek independent legal advice. The LA will also try to establish the child's permanent address and prioritise the application made by the parent or carer living at this address in accordance with the published admission arrangements. In most circumstances this will be the application submitted by the parent or carer who is in receipt of the child benefit for the child to whom the application relates.

There may be some circumstances where the LA will suggest that parents or carers seek independent legal advice and ask that they provide copies of any relevant court order relating to child arrangements.

- (3) The scheme does not apply to those places set aside for boarders.
- (4) The scheme will be implemented in line with the timetables set out in Appendix 1 and 2.
- (5) Appendix 3 and 4 list the admission authorities to which the scheme applies.

2. The Common Application Forms

- (1) There will be three standard forms known as the Common Application Forms. In line with county council policy, online applications are encouraged and references to the various forms below include those available online. Hard copies are also available. The forms are as follows:

SA1 – Westmorland and Furness Admission to Infant or Primary School – September 2025

SA2 – Westmorland and Furness Transfer to Junior School – September 2025

SA3 – Westmorland and Furness Transfer to Secondary School – September 2025

- (2) The forms will be used for the purpose of admitting pupils into the Reception Year for infant and primary, Year 3 for junior and Year 7 for secondary intake groups in September 2025. They will:
 - invite parents or carers to express three preferences for schools in rank order of preference including, where relevant, any schools outside the LA's area.
 - explain that parents or carers are entitled to give their reasons for their preferences; and
 - specify the closing date and to whom the form must be returned.

- (3) The LA will ensure that the SA1, SA2, and SA3 are available online and from the LA. They will be available online from 4 September 2024. Parents and/or carers of children in their last year at an infant school will receive information about how to apply for a junior school place from the infant school. Those with a child in the last year of a primary or junior school will receive information about how to apply for a secondary school place from their current primary or junior school. Information about schools together with an application form will be made available on the Westmorland and Furness Council website.
- (4) The governing body of a voluntary aided, foundation, free school or an academy trust can require parents or carers who wish to express a preference for their school on the common application form, to provide additional information on a supplementary form, or by way of supporting evidence only where the information is required for the governing body or academy trust to apply their oversubscription criteria. Where a supplementary form or supporting evidence is required it must be returned to the school where entry is sought.
- (5) A supplementary form **will not** be regarded as a valid application unless the parent and/or carer has also completed a common application form and the school has been given as one of their preferences.
- (6) Where common application forms are sent directly to voluntary aided, foundation, free schools or academies, they must be passed to the LA within five school days.

3. The Closing Date for Application Forms [SA1, SA2 and SA3]

- (1) Completed forms must be returned as follows:

SA3 – by 31 October 2024 online, to the child’s current junior or primary school or directly to the School Admissions and Appeals Team.

SA1 – by 15 January 2025 online, to the parent or carer’s preferred school or directly to the School Admissions and Appeals Team

SA2 – by 15 January 2025 online, to the child’s current infant school or directly to the School Admissions and Appeals Team

Parents or carers who are resident in the local authority area of Westmorland and Furness and whose children do not attend a school in the local authority area of Westmorland and Furness, or any parent or carer preferring to return their form direct to the LA, should return the form to the Westmorland and Furness School Admissions and Appeals Team. The same closing dates apply.

Parents or carers who are resident in the local authority area of Westmorland and Furness and who wish to apply for a school place at a maintained school or academy outside of the local authority of Westmorland and Furness should still complete one of the above forms and make an application via Westmorland and Furness Council. Their application should be submitted to the Westmorland and Furness School Admissions and Appeals Team by the closing dates, as set out above.

- (2) Where a preference has been expressed for a voluntary aided, foundation, free school or an academy requiring a supplementary form or supporting evidence, this should be returned directly to that school by the above closing dates.

- (3) All schools must forward completed Westmorland and Furness application forms to the LA on a weekly basis as and when they are received. The final deadlines for the forms to be sent by first class post are:

SA3 – Friday 1 November 2024

SA1 – Thursday 16 January 2025

SA2 – Thursday 16 January 2025

- (4) In relation to all Westmorland and Furness schools, preferences which are submitted or changed after the closing date will only be considered in exceptional circumstances.

- (5) Even if there are exceptional circumstances, it will not be possible to consider applications received or changed after:

5 January 2025 for Transfer to Secondary - Year 7 [SA3]

9 February 2025 for Starting Infant or Primary - Reception [SA1]

9 February 2025 for Transfer to Junior - Year 3 [SA2]

until after the allocation of places has been made for all those parents or carers who applied on time.

4. Completing the SA1, SA2 and SA3 Application Forms

- (1) If a parent or carer completes the application form in such a way that the ranking of two or more preferences is not clear, the distance between home and school, measured by the shortest walking route by road between the pupil's home address and the nearest available entrance on the school site, using the LA's Geographical Information System (GIS) mapping system, will be used to rank the preferences concerned. The nearest school will be regarded as the highest preference.
- (2) If more than one form is received, and any earlier applications have not been withdrawn in writing, the most recently dated application form [submitted by the relevant closing date] will be used. If forms are not dated or are dated on the same day, those schools where the order of preferences is not clear will be ranked as in 4(1) above. See also, section 1(2)(ii) relating to parental disputes.

5. Testing of Ability or Aptitude

- (1) Where a selection test of any kind, i.e., for ability or aptitude, is part of the school's admission arrangements, the admission authority for the school must make it clear to parents or carers that, whilst they can be tested, they are still required to express a preference for that school on the appropriate form SA1, SA2 or SA3 otherwise they **will not** have applied for a school place.

6. Determining Offers in Response to the Common Application Forms [i.e., SA1, SA2 and SA3]

- (1) All preferences will be considered equally. This is known as an **equal preference scheme**. It means that a child will be considered for a place at each school named on the application form irrespective of whether the school was given as the 1st, 2nd, or 3rd preference on the application. Where a child is eligible for a place at more than

one of the preferred schools given on the original application form, a place at the school given as the highest preference will be offered on national offer day.

- (2) The LA will only make any decision with respect to the offer or refusal of a place in response to any preferences expressed on the application forms where:
- it is acting in its separate capacity as an admission authority, or
 - an applicant is eligible for a place at more than one school [see 6(1) above]; or
 - an applicant is not eligible for a place at any school for which they have expressed a preference. A place would only be offered at a voluntary aided, foundation, free school or an academy if its admission number had not been reached in offering places to those parents and/or carers who submitted a timely application and gave the school as one of their three preferences.

7. Parents and Carers Applying for a Place at a School Outside of the local authority area of Westmorland and Furness

- (1) Parents or carers may express a preference for school[s] in another LA area.
- (2) If a pupil would be eligible for a place at a school in the local authority area of Westmorland and Furness and a neighbouring Authority has also indicated that a place can be offered at one of its schools, the parents and/or carers will be offered the place at the school which was ranked as their highest preference.

8. Processing Parental Preferences

The following timetable sets out the final deadline dates that will be applied to the processing of parent or carer preferences received by the relevant closing date (31 October 2024 for secondary schools [SA3] and 15 January 2025 for infant, primary [SA1] and junior schools [SA2]):

	Secondary [SA3]	Reception [SA1]	Junior [SA2]
LA notification to other LAs of preferences expressed for schools in their area.	18.11.24	27.01.25	27.01.25
LA notification to voluntary aided, foundation, free schools, and academies of all first, second and third preference applications received [see note]. Details of number of applications received to community and voluntary controlled schools.	25.11.24	27.01.25	27.01.25
Final date for governing bodies of voluntary aided, foundation and free schools and academy trusts to consider all applications, apply the school's oversubscription criteria and provide the LA with a list showing which category in their admissions policy each applicant falls into.	9.12.24	10.02.25	10.02.25

	Secondary [SA3]	Reception [SA1]	Junior [SA2]
<p>Ranking of applicants in the category in which the cut-off point falls must also be shown.</p> <p>Note: Any school having difficulties meeting this deadline must agree an alternative one with the School Admissions and Appeals Team.</p>	9.12.24	10.02.25	10.02.25
<p>Liaison period for the LA and voluntary aided, foundation, free schools, and academies to finalise allocations. Lists for oversubscribed schools will be compared. Where a place can be offered at more than one school, the LA will identify the highest preference school that can be offered. This will become the 'provisional allocation'.</p>	9.12.24 to 20.01.25	10.02.25 to 05.03.25	10.02.25 to 05.03.25
<p>Finalise Allocations</p> <p>Other LAs notified of places in schools in the local authority are of Westmorland and Furness to be offered to their residents.</p> <p>Notification to all maintained schools and academies of number of pupils to be offered a place. NB: This is confidential information and must not be passed on to parents or carers. The information is provisional and may, if necessary, change prior to the relevant National Offer Day.</p> <p>LA notification to parents or carers informing them of the outcome of their application [Offer Days].</p>	10.02.25	18.03.25	18.03.25
	26.02.25	14.04.25	14.04.25
	03.03.25	16.04.25	16.04.25
<p>Note</p> <p>The LA will notify voluntary aided, foundation, free schools and academies of all first, second and third preference applications which have been received for their school. In line with legislation, where these preferences are passed on, the order of parents or carers' preferences <u>will not</u> be made known to schools.</p> <p>Community and voluntary controlled schools will be informed how many first preference applications have been received.</p> <p>This information is for school use only to enable the admission authority to apply the schools oversubscription criteria in order to provide a full ranking list to the LA by the required deadline. The information should not be used for any other purpose.</p>			

- During the liaison period with voluntary aided, foundation, free schools and academies, the LA will adjust the pupil lists to remove children who can be offered a higher preference school.

- Voluntary aided, foundation, free schools and academies will have provided a full ranking list to the LA by the specified deadline (9 December 2024 for secondary schools and 10 February 2025 for infant, primary and junior schools). However, during the liaison period, the LA may need to discuss changes to the allocation lists with voluntary aided, foundation free schools and academies and some further ranking may be required. Where this is the case, an appropriate deadline for the submission of revised information, to the LA, will be agreed with the individual school.

9. Distance Measurements

(1) Straight-line Measure

Where there are more applications than places available at a community or voluntary controlled school for entry to all year groups, applications will be prioritised using the oversubscription criteria set out in the General Admission Policy 2025-26. For any criteria that gives priority to those living closest to the school, distance measurements will be undertaken using the LAs computerised Geographical Information System (GIS). This measurement will be a straight-line measurement between the centre of the pupil's home address and a common point on the school site as determined by the LA.

(2) Shortest Walking Route by Road

Where a place cannot be offered at any of the parents or carers' preferred schools, the LA will allocate a place at the nearest school in the Local Authority area of Westmorland and Furness to the home address with a place available after all timely applications have been processed. In these circumstances, the distance will be measured by the shortest walking route by road between the pupil's home address and the nearest available entrance on the school site using the LA's GIS mapping system.

10. Where a Place is Not Available at the Parents or Carers' Preferred Schools

- (1)** Where a child is not eligible for a place at any of their parents or carers' preferred schools, they will be allocated a place at the nearest school in the local authority area of Westmorland and Furness to the home address with a place available after all timely applications have been processed, measured by the shortest walking route by road (9(2) refers) using the LA's GIS mapping system. Unless a parent or carer has specifically stated that they would not accept a place at a Catholic school, a place at a Catholic school would be offered where this is the nearest appropriate school.
- (2)** If only one school is named on the application form and it is not possible to allocate a place at that school, the child will not automatically be considered for any other schools in the local authority area of Westmorland and Furness, e.g., the catchment area school; this is because the schools were not named on the application form. In these circumstances a place will be allocated at the nearest school in the local authority area of Westmorland and Furness with a place available after all timely applications have been processed, measured by the shortest walking route by road (9(2) refers) using the LA's GIS mapping system.
- (3)** If a school is identified as the alternative school for more pupils than there are places available, the General Admission Policy 2025-26 or the school's oversubscription criteria will determine priority for a place.

11. Informing Parents and Carers of the Outcome of Their Application

(1) The LA will inform all parents or carers of the outcome of their application as follows:

Online applications

Parents or carers who have made their application online will receive an email on the following dates, or on the first working day thereafter:

Year 7 Places [Secondary]	-	3 March 2025
Reception Places [Infant/Primary]	-	16 April 2025
Year 3 Places [Junior]	-	16 April 2025

Paper applications

Parents or carers who have made paper applications will receive a letter. Letters will be sent by post or e-mail on the dates above, or on the first working day thereafter.

All parents or carers who have been refused a place at their preferred school(s) will also receive a letter. This will be as well as the e-mail notification that will be issued if the application was made online.

The letters will give the following information:

- the name of the school at which a place has been offered.
- in relation to voluntary aided, foundation, free schools, and academies, that the offer is made on behalf of the governing body or the academy trust.
- the reasons why the child has not been offered a place at the other schools which were given as a preference (if relevant).
- contact details for the LA where a place has not been offered.
- information about the statutory right of appeal against the decision to refuse a place at any school given as a higher preference.
- confirmation that the right of appeal is in relation to any school given as a preference and where a place has not been allocated; and
- confirmation that in the re-allocation process, parents or carers will be considered for any places that might become available in schools they ranked higher than the school they have been offered, and what to do if they wish to be considered for any vacancies beyond that point.

(2) Parents or carers who **don't wish** to take up the place offered because they have made alternative arrangements will be asked to do so by the following dates:

Year 7 Places [Secondary]	17 March 2025
Reception Places [Infant/Primary]	30 April 2025
Year 3 Places [Junior]	30 April 2025

If parents or carers do not respond by this date it will be deemed that they have accepted the place.

12. Re-allocating Places which are not Taken Up or Subsequently Become Vacant

- (1) The LA will re-allocate any places which have become vacant since allocation letters were sent out. This will take place on or around:

Year 7 Places [Secondary] 24 March 2025

Reception Places [Infant/Primary] 7 May 2025

Year 3 Places [Junior] 7 May 2025

- (2) Consideration will be given to all outstanding applicants, including any late applications.
- (3) Places will be re-allocated by applying the school's oversubscription criteria (for community and voluntary controlled schools the LA oversubscription criteria will apply). Where the information is not already held, the LA will liaise with voluntary aided, foundation, free schools and academies regarding the ranking of outstanding applicants.
- (4) During the course of the year, as vacancies arise, the LA will re-allocate the places to those applicants on the waiting list of community and voluntary controlled schools in accordance with its oversubscription criteria.

13. Late Applications Submitted After the Main Intake Closing Dates

- (1) Applications received by the LA after the main admissions round closing dates and where there are no exceptional circumstances, or after the dates specified at 3(5) even if there are exceptional circumstances, will only be considered **after** the allocation decisions have been made in paragraph 8.
- (2) Where it is not possible to offer a place on the Offer Days [paragraph 8] a place will be offered as soon as possible thereafter however, this may not be until re-allocation day. For any school that is oversubscribed, late applicants will not be notified of the outcome of their application until after re-allocation day (see 12(1)).

14. Waiting Lists

- (1) The LA will maintain a waiting list for each community and voluntary controlled primary and secondary school, i.e., those schools where the LA is the admission authority, until 31 December of the normal school year of admission.
- (2) Waiting lists for schools will be kept by the relevant admission authority until 31 December 2025 as a minimum.

15. Applications Received After the First Day of the School Year and Other In-Year Requests for Admission

- (1) Applications received after the first day of the school term of the admissions year, and at any time for entry other than to the normal year of entry, will be treated as in-year admissions. These applications should be made on Form SA8.
- (2) Once any places have been re-allocated on the specified dates, and until 31 August 2025, any applications for entry in September 2025 to Reception in an infant or

primary school, Year 3 in a junior school or Year 7 in a secondary school will continue to be treated as main intake applications for the normal admissions round.

- (3) Westmorland and Furness Forms SA1, SA2 and SA3 will be used for this purpose up until the first day of the school term of the normal admissions year. From re-allocation day up until the first day of the school term of the normal admissions year, the LA will continue to process all main intake applications. The LA will liaise with voluntary aided, foundation, free schools, and academies regarding the allocation of places for the normal year of entry. The LA, as the admissions authority, will continue to process applications for community and voluntary controlled schools for the normal year of entry.
- (4) For community and voluntary controlled schools which have been oversubscribed, the LA will continue to re-allocate places up to the end of the autumn term in line with its published admission arrangements. Therefore, if parents contact schools to request a September 2025 Reception, Year 3 or Year 7 school place, the school should refer the parent to the LA.
- (5) Community and voluntary controlled schools that are not oversubscribed may advise parents about the availability of places in the normal year of entry or in any other year group at the school. However, if parents wish to make an application for a place, they should be directed to the LA. All applications for in-year admission to a community or voluntary controlled school must be made using a Form SA8 that will be processed by the LA.
- (6) The LA is responsible for processing all in-year applications for all community and voluntary controlled schools; Appendix 3 lists the community and voluntary controlled schools for which the LA is admissions authority. If a parent contacts the school requesting admission, the parent should be referred to the Westmorland and Furness School Admissions and Appeals Team in order that Form SA8 can be completed by the parent.
- (7) The LA is also responsible for processing all in-year applications for the own admission authority schools listed at Appendix 4.
- (8) For the schools listed at Appendix 5, if any parent approaches a voluntary aided, foundation, free school, or academy directly about an in-year admission, the governing body or academy trust should offer a place where possible and notify the Westmorland and Furness LA. Where a place cannot be offered, the governing body or academy trust **must** offer the right of appeal and advise the parent to contact the Westmorland and Furness School Admissions and Appeals Team in order that a Form SA8 can be completed.

Own admission authority schools **must** notify the LA of both the application and its outcome to allow the LA to keep up to date figures on the availability of places in the area.

- (9) Where the LA receives an SA8 direct from a parent giving a voluntary aided, foundation, free school, or academy as their first preference or in pursuing alternative preferences where higher preferences have been refused, the request will be referred to the governing body or academy trust to make a determination regarding the application. The governing body or academy trust should notify the parent or carer in writing of its decision with a copy to the LA.

- (10) Parents who are refused admission **must** be offered a right of appeal. The reason for the refusal and information about the appeals process **must** be provided by the relevant admission authority in the refusal letter.
- (11) The LA will keep track of any pupils who apply for in-year admission using form SA8 and intervene as appropriate to ensure that they are placed in a school without undue delay.

16. Applications for Queen Elizabeth Studio School

- (1) Queen Elizabeth Studio School offer the opportunity for pupils to join them at the beginning of Year 10. Details about both of these schools are included in the Transfer to Secondary School in Westmorland and Furness – September 2025 parental information booklet produced by the LA.
- (2) For further information and to apply for a place at Queen Elizabeth Studio School, parents should contact the schools directly.

WESTMORLAND AND FURNESS COUNCIL CO-ORDINATED ADMISSIONS SCHEME FOR INFANT, JUNIOR, AND PRIMARY SCHOOLS [MAIN ADMISSIONS ROUND]

Scheme Timetable - September 2025 Entry to Reception and Year 3

<p>15 January 2025</p>	<p>SA1s [Reception] to be submitted online to the Westmorland and Furness School Admissions and Appeals Team; if submitting a paper form, return to the parents or carers first preference school or directly to the Westmorland and Furness School Admissions and Appeals Team by 15 January 2025. Any supplementary form and documentary evidence, if required, that is relevant in relation to admission to voluntary aided, foundation, free schools and academies must be returned by parents or carers to the school for which the supplementary information is relevant by 15 January 2025.</p> <p>SA2s [Year 3] to be submitted online to the Westmorland and Furness School Admissions and Appeals Team; if submitting a paper form, return to the parents or carers first preference school or directly to the Westmorland and Furness School Admissions and Appeals Team by 15 January 2025. Any supplementary form and documentary evidence, if required, that is relevant in relation to admission to voluntary aided, foundation, free schools and academies must be returned by parents and carers to the school for which the supplementary information is relevant by 15 January 2025.</p>
<p>16 January 2025</p>	<p>Schools to pass SA1s and SA2s to the LA on a weekly basis as and when they are received, but to be sent by first class post on this date at the latest.</p> <p>Schools to maintain a record of all forms received. This should include a list of who has submitted an application form together with the date the form is received in school.</p>
<p>25 January 2025</p>	<p>Other LAs to be notified of preferences which have been expressed for schools in their area.</p>
<p>27 January 2025</p>	<p>The Westmorland and Furness LA will notify voluntary aided, foundation, free schools, and academies of all first, second and third preference applications which have been received for their school. In line with legislation, where these preferences are passed on, the order of parents or carers' preferences <u>will not</u> be made known to schools.</p> <p>Community and voluntary controlled schools will be informed how many first preference applications have been received.</p>
<p>10 February 2025</p>	<p>Voluntary aided, foundation, free schools, and academies to provide LA with a list showing which category in their admissions policy each applicant falls into. This list should be in rank order, ranked from 1 onwards, beginning with the applicant with the highest priority for a place</p>

	<p>at the school through to the applicant with the lowest priority for a place.</p> <p>When the ranking list is returned to the LA, each applicant should have an individual ranking and the relevant category of the admission policy should be specified, e.g.:</p> <table border="1"> <thead> <tr> <th>Category in Policy</th> <th>Ranking</th> <th>Child Details (including DOB, address, sibling information, relevant distance measurement, etc.)</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>1</td> <td>Child A (child with highest priority for place)</td> </tr> <tr> <td>2</td> <td>2</td> <td>Child B</td> </tr> <tr> <td>2</td> <td>3</td> <td>Child C</td> </tr> <tr> <td>4</td> <td>4</td> <td>Child D</td> </tr> <tr> <td>4</td> <td>5</td> <td>Child E</td> </tr> <tr> <td>4</td> <td>6</td> <td>Child F</td> </tr> <tr> <td>5</td> <td>7</td> <td>Child G</td> </tr> </tbody> </table> <p>and so on.... until all applicants have been categorised and ranked.</p> <p>If the rankings returned do not include the category in policy and an individual ranking for each applicant LA will return the list to the school to be re-ranked correctly.</p> <p>If any school has difficulties with this deadline, an alternative one must be agreed with the LA.</p>	Category in Policy	Ranking	Child Details (including DOB, address, sibling information, relevant distance measurement, etc.)	1	1	Child A (child with highest priority for place)	2	2	Child B	2	3	Child C	4	4	Child D	4	5	Child E	4	6	Child F	5	7	Child G
Category in Policy	Ranking	Child Details (including DOB, address, sibling information, relevant distance measurement, etc.)																							
1	1	Child A (child with highest priority for place)																							
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4	6	Child F																							
5	7	Child G																							
9 February 2025	After this date, no late or changed applications to be considered, even if there are exceptional circumstances.																								
10 February to 05 March 2025	The LA will liaise with voluntary aided, foundation, free schools and academies in order to finalise allocations.																								
18 March 2025	Other LAs will be notified of places in schools in the local authority area of Westmorland and Furness.																								
24 March to 4 April 2025	LA will finalise allocations.																								
14 April 2024	<p>LA will provide a provisional list of places allocated to all maintained schools and academies in the local authority area of Westmorland and Furness.</p> <p>Schools should be aware that, if necessary, there may be changes to allocations between 14 April and the notification of places on National Offer Day.</p> <p>The provisional list of places allocated is for school use only; information from the list must not be shared with parents or carers.</p>																								
16 April 2025	LA will notify parents or carers of their allocation.																								
30 April 2025	Parents or carers who don't wish to take up the place offered because they have made alternative arrangements will be asked to respond by this date. Where parents and carers have not responded by this date, the LA will assume acceptance of the place offered.																								
7 May 2025	LA will re-allocate any places which have become available, after this date.																								

**WESTMORLAND AND FURNESS COUNCIL CO-ORDINATED ADMISSIONS SCHEME -
SECONDARY SCHOOLS [MAIN ADMISSIONS ROUND]**

Scheme Timetable - September 2025 Entry to Year 7

<p>31 October 2024</p>	<p>SA3s to be submitted online to the Westmorland and Furness School Admissions and Appeals Team; if submitting a paper form, return to the child's current school or directly to the Westmorland and Furness School Admissions and Appeals Team by 31 October 2024. Any supplementary form and documentary evidence, if required, that is relevant in relation to admission to voluntary aided, foundation, free schools and academies must be returned by parents or carers to the school for which the supplementary information is relevant by 31 October 2024.</p> <p>Each primary/junior school should maintain a record of the applications it receives from parents or carers as well as the date these are received. Before the closing date for applications (31 October 2024) the school should contact those parents or carers where the record kept in school indicates that a parent or carer may not have applied for a Year 7 school place.</p>
<p>01 November 2024</p>	<p>Schools to pass SA3s and any supplementary forms to the Westmorland and Furness LA on a weekly basis as and when they are received, but to be sent by first class post on this date at the latest.</p>
<p>18 November 2024</p>	<p>Other LAs to be notified of preferences which have been expressed for schools in their area.</p>
<p>25 November 2024</p>	<p>The LA will notify voluntary aided, foundation, free schools and academies of all first, second and third preference applications which have been received for their school.</p> <p>In line with legislation, where these preferences are passed on, the order of parents or carers' preferences <u>will not</u> be made known to schools.</p> <p>Community and voluntary controlled schools will be informed how many first preference applications have been received.</p>
<p>9 December 2024</p>	<p>Voluntary aided, foundation, free schools and academies to provide LA with a list showing which category in their admissions policy each applicant falls into.</p> <p>This list should be in rank order, ranked from 1 onwards, beginning with the applicant with the highest priority for a place at the school through to the applicant with the lowest priority for a place.</p> <p>When the ranking list is returned to the LA, each applicant should have an individual ranking and the relevant category of the admission policy should be specified, e.g.</p>

	Category in Policy	Ranking	Child Details (including DOB, address, sibling information, relevant distance measurement, etc.)
	1	1	Child A (child with highest priority for place)
	2	2	Child B
	2	3	Child C
	4	4	Child D
	4	5	Child E
	4	6	Child F
	5	7	Child G
	and so on....		
	8	198	Child GP
	8	199	Child GQ
	8	200	Child GR (child with lowest priority for place)
	<p>If the rankings returned do not include the category in policy and an individual ranking for each applicant LA will return the list to the school to be re-ranked correctly.</p> <p>If any school has difficulties with this deadline, an alternative one must be agreed with the LA.</p>		
09 December 2024 to 20 January 2025	The LA will liaise with voluntary aided and foundation schools, free schools and academies in order to finalise allocations.		
05 January 2025	After this date, no late or changed applications to be considered, even if there are exceptional circumstances.		
10 February 2025	Other LAs will be notified of places in schools in the local authority area of Westmorland and Furness which can be offered to their residents.		
17 to 21 February 2025	LA will finalise allocations.		
26 February 2025	<p>LA will provide a provisional list of places allocated to all maintained schools and academies in the local authority area of Westmorland and Furness.</p> <p>Schools should be aware that, if necessary, there may be changes to allocations between 26 February and the notification of places on National Offer Day.</p> <p>The provisional list of places allocated is for school use only; information from the list must not be shared with parents or carers.</p>		
3 March 2025	LA will notify parents or carers resident in the local authority area of Westmorland and Furness of their allocation.		
17 March 2025	Parents or carers who don't wish to take up the place offered because they have made alternative arrangements will be asked to respond by this date. Where parents and carers have not responded by this date, the LA will assume acceptance of the place offered.		
24 March 2025	LA will re-allocate any places which have become available, after this date.		

WESTMORLAND AND FURNESS CO-ORDINATED ADMISSIONS SCHEME – INFANT, PRIMARY AND JUNIOR SCHOOLS

Admission Authorities in the Area of the local authority area of Westmorland and Furness to which the Scheme Applies: Normal Round Admissions and In-Year admissions

Subject to any school converting to foundation or academy status, Westmorland and Furness Council is the Admission Authority for the following community and voluntary controlled infant and primary schools

Allithwaite School	Levens CE School
Armathwaite School	Lindal and Marton Primary School
Asby Endowed School	Lindale CE School
Barrow Island Community Primary School	Long Marton Community Primary School
Bolton Primary School	Low Furness CE Primary School
Brisbane Park Infant School	Milburn School
Brough Primary School	Milnthorpe Primary School
Broughton CE Primary School	Newbarns Primary School
Brunswick School	Newton Primary School
Burlington CE Primary and Nursery School	North Walney Primary School
Cambridge Primary School	Old Hutton CE School
Cartmel CE Primary School	Ormsgill Primary
Chapel Street Infant and Nursery School	Pennington CE School
Clifton School	Plumpton School
Coniston Primary School	Ramsden Infant School
Croftlands Infant and Nursery School	Roose School
Dane Ghyll Community Primary School	Sedbergh Primary School
Goodly Dale Community Primary School	Sir John Barrow School
Grange CE Primary School	Skelton School
Greystoke School	South Walney Infant and Nursery School
Hawkshead, Esthwaite Primary School	St George's CE School
Heron Hill Primary School	Staveley CE School
High Hesket CE School	Storth CE School
Holme Community School	Temple Sowerby CE Primary School
Kirkby Stephen Primary School	Vicarage Park CE Primary School
Kirkby Thore School	Vickerstown
Kirkoswald CE School	Victoria Infant and Nursery School, Barrow
Langwathby CE School	

Subject to any school converting to foundation or academy status, Westmorland and Furness Council is the Admission Authority for the following community and voluntary controlled junior schools

Croftlands Junior School	North Lakes School
George Romney Junior School	South Walney Junior School
Greengate Junior School	

WESTMORLAND AND FURNESS CO-ORDINATED ADMISSIONS SCHEME – SECONDARY SCHOOLS

Admission Authorities in the Area of the local authority area of Westmorland and Furness to which the Scheme Applies: Normal Round Admissions and In-Year Admissions

Subject to any school converting to foundation or academy status, the Westmorland and Council is the Admission Authority for the following community and voluntary controlled schools:

Dowdales School
John Ruskin School

The Lakes School
Ulverston Victoria High School

WESTMORLAND AND FURNESS CO-ORDINATED ADMISSIONS SCHEME – INFANT, PRIMARY AND JUNIOR SCHOOLS, AND SECONDARY SCHOOLS

Admission Authorities in the Area of the local authority area of Westmorland and Furness to which the Scheme Applies: In-Year Admissions

The governing body or academy trust is the Admission Authority for the following voluntary aided, foundation, free schools and academies

The School Admissions Code 2021 does make provision for an LA to offer of a co-ordination service to own admissions authority school; appendix 4 will be updated when appropriate.

Appendix 5

WESTMORLAND AND FURNESS CO-ORDINATED ADMISSIONS SCHEME – INFANT, PRIMARY AND JUNIOR SCHOOLS

Admission Authorities in the Area of the local authority area of Westmorland and Furness to which the Scheme Applies: Normal Round Admissions

The governing body or academy trust is the Admission Authority for the following voluntary aided, foundation, free schools and academies

Alston Primary School	Nenthead Primary School
Ambleside CE Primary School	Ormsgill Primary School
Appleby Primary School	Orton CE School
Arnside National CE School	Our Lady of the Rosary Catholic Primary School
Askam Village School	Parkside GGI Academy
Beaconside CE Primary School	Patterdale CE School
Beetham CE School	Penny Bridge CE School
Burton Morewood CE Primary Academy	Penruddock Primary School
Calthwaite CE School	Sacred Heart Catholic Primary School
Castle Park School	Selside Endowed CE School
Chetwynde School	Shap Endowed CE School
Church Walk CE Primary School	St Catherine's Catholic Primary School
Crosby Ravensworth CE School	St Columba's Catholic Primary School
Crosscrake CE School	St Cuthbert's Catholic Primary School
Crosthwaite CE School	St Mark's CE School
Culgaith CE School	St Martin and St Mary's CE Primary School
Dalton St Mary's CE Primary School	St Mary's Catholic Primary School, Ulverston
Dean Barwick School	St Mary's CE Primary School, Kirkby Lonsdale
Dean Gibson Catholic Primary School	St Oswald's CE Primary School
Dent CE Voluntary Aided Primary School	St Patrick's CE School, Endmoor
Flookburgh CE School	St Pius X Catholic Primary School
Ghyllside Primary School	St Thomas's CE School
Grasmere CE School	Stainton CE School
Grayrigg CE School	Stramongate Primary School
Holy Family Catholic Primary School	Tebay Community Primary School
Ireleth St Peter's CE School	Threlkeld Primary School
Ivegill CE School	Vickerstown School
Langdale CE School	Waberthwaite CE School
Lazonby CE School	Warcop CE School
Leven Valley CE School	Yanwath Primary School
Lowther Endowed Primary School	Yarlside Primary School
Morland Area CE School	

The governing body or academy trust is the Admission Authority for the following voluntary aided, foundation, free schools and academies junior schools

St James' CE Junior School
Victoria Academy, Barrow

St Paul's CE Junior School

WESTMORLAND AND FURNESS CO-ORDINATED ADMISSIONS SCHEME – SECONDARY SCHOOLS

Admission Authorities in the Area of the local authority area of Westmorland and Furness to which the Scheme Applies: Normal Round Admissions

The governing body is the Admission Authority for the following foundation, voluntary aided schools and academies:

Appleby Grammar School
Cartmel Priory CE School
Chetwynde School
Dallam School
Furness Academy
Kirkbie Kendal School
Kirkby Stephen Grammar School
Queen Elizabeth Grammar School

Queen Elizabeth School
Queen Elizabeth Studio School
Queen Katherine School, The
Samuel King's School
Settlebeck High School
St Bernard's Catholic High School
Ullswater Community College
Walney school

Determining the ‘Relevant Area’ for Consultation on Admission Arrangements for Own Admission Authority Schools in the Local Authority Area of Westmorland & Furness

All schools where the governing body or academy trust is the admission authority, ie voluntary aided, foundation, free schools and academies (including UTCs and Studio Schools), must consult the Local Authority (LA) and all schools (including community and voluntary controlled schools) within their ‘relevant area’ before determining their admission arrangements. Some schools will also need to consult neighbouring LAs and schools in neighbouring authorities.

Proposed Definition of Relevant Areas for Admission Authorities in Westmorland & Furness

1. Primary Voluntary Aided, Foundation, Free Schools and Academies
 - (1) all primary schools with the catchment area of the school, all primary schools whose catchment areas adjoin the catchment area of the school and any other primary schools within those adjoining catchment areas; and
 - (2) where appropriate, the neighbouring LA, i.e. where the school’s catchment boundary is coterminous with the neighbouring LA boundary, and any schools in the neighbouring LA within a 2 mile radius.
2. Secondary Voluntary Aided, Foundation, Free Schools and Academies (including UTCs and Studio Schools)
 - (1)
 - (i) all secondary schools whose catchment area adjoin the catchment area of the school;
 - (ii) all primary schools with the catchment area of the secondary school; and
 - (iii) all primary schools whose catchment areas adjoin the catchment area of the secondary school.
 - (2) where appropriate, the neighbouring LA, i.e. where the school’s catchment boundary is coterminous with the neighbouring LA boundary, and any primary and secondary schools in the neighbouring LA within a 5-mile radius.

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Cabinet

Report Title	Award of Framework Agreement for the Provision of Homecare and Domiciliary Care Services
Date of Meeting	23 January 2023
Report Author	Colin Phipps
Director	Cath Whalley – Director of Adult Social Care
Lead Cabinet Member	Cllr Patricia Bell – Deputy Leader of the Council
Why is this a key decision?	<p>1. an executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council’s budget for the service or function to which the decision relates YES</p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are “significant” if they are equal to or greater than £500,000. YES</p> <p>For clarification, no treasury management decision shall constitute a Key Decision</p>
Wards Affected	All
Identify exempt information and exemption category	None
Reasons for urgency (only where applicable)	
Appendices (if any)	Appendix A – Providers to be appointed Appendix B – EiA Homecare Recommissioning Appendix C – Initial mapping

1. Executive Summary

- 1.1 This paper seeks the approval to adopt the Open Framework Agreement For The Provision of Homecare and Domiciliary Care Services, approve the appointment of providers who have met or exceeded the minimum standards required and the approval of a delegated process to appoint future providers to the Framework.

2. Recommendations

For the reasons set out in this report, Cabinet is recommended to:

- 2.1 Adopt the Open Framework Agreement for the Provision of Homecare and Domiciliary Care Services. This is for a 2 year period with a possible 1 year extension with a total estimated value of £41m. This is inclusive of the 1 year extension and potential spend of the Lancashire and South Cumbria

Integrated Commissioning Board as an associate of the Framework. The Framework will commence 1 April 2024 and run until March 31 2026. If the extension was utilised the termination of the Framework will be March 31 2027.

- 2.2 Appoint the providers detailed in Appendix A who have met or exceeded the minimum requirement.
- 2.3 Agree to delegate the future approval of appointment of providers to the Framework to the Director of Adult Social Care in consultation with the Director of Resources.

3. Information: the Rationale & Evidence for the Recommendations

- 3.1 Under the Care Act 2014, the Council is obliged to provide care to eligible residents of Westmorland and Furness, which includes the provision of social care and support, throughout the day, for people living in their own homes. This Framework would enable to Council to meet these statutory obligations.
- 3.2 The Council currently uses the legacy framework from Cumbria County Council which is hosted by Cumberland Council to call off homecare spot purchased contracts, with multiple providers currently on the existing framework. This existing Framework ceases on March 31 2024 and the Council will need in place for April 1 2024 a new mechanism for ordering/prescribing homecare.
- 3.3 Within Westmorland and Furness the annual value of the Council commissioned services contracted through the framework is c.£10.7m, supporting over 800 people, delivering c. 9,000 hours of support per week. This does not include any provision through off-framework arrangements, direct payments, ISFs and/or provision delivered by Care Services. Whilst anticipated Council spend against the Framework is expected to remain within this region, actual spend is demand lead and there is no value commitment with the Framework.
- 3.4 The new Framework is relatively short at 2 years with a possible 1 year extension. This is designed as such so as a new local unitary authority there is opportunity to fully develop its long term strategic plan regarding domiciliary services and more widely its adult social care strategy before committing to a long term arrangement. Although this is a short term arrangement there have been a number of areas that have been reviewed and evolved to deliver improvements in the service, which include:
 - Improving quality and quality assurance – this has included updating the required key performance indicators, updating requirements in areas such as training and competency and increased requirements in user surveys. In addition, there are improvements to the awarding of providers onto the framework and a new onboarding process to support providers and clearly set out the Council's vision.
 - Improving partnership working – Lancashire and South Cumbria Integrated Commissioning Board (L&SC ICB) have become an associate member of the new Framework, which means they can (should they choose) call off directly/contract directly with all providers on the Framework using it terms

and conditions. This would support equalisation in terms of rates within the geographical as well as expectations around quality and management reporting. This has been estimated as a potential value of up £9m over the lifetime of the Framework although there is no committed spend.

- Maintaining and improving hospital flow – commitments to support packages of care for people who are in hospital, developing market capacity.
- 3.5 The Framework will adopt an Any Qualified Provider (AQP) approach which allows for multiple providers to join the framework, with new providers being able to join throughout its duration. All providers will be required to meet minimum standards before they can be appointed and will also be required to complete an onboarding process where the council can clarify the vision and requirements related to the framework.
 - 3.6 The Framework will use the existing portal to support the delivery of homecare services through spot purchase arrangements. Using this system a scoring mechanism based on a range of metrics will be used to award packages of care, however there will also be the option for users to select their personal preferred choice.
 - 3.7 The Framework will have three rate bandings as per the current framework that will largely be based on Lower Layer Super Output Areas (some will be amalgamated for administrative ease, using the urban, rural and extra rural as the principal determinant on the rate banding. However other factors will be considered such as current and historical challenges for recruitment (see appendix C).
 - 3.8 The Framework will not preclude the council from developing alternative arrangements to meet demand for homecare if required, such as block arrangements.
 - 3.9 In accordance with procurement rules the Council followed a clear, structured and transparent process to ensure that all tenderers were treated equally and fairly. The Council published Invitation to Tender (ITT) through Sproct.Net on 27th September 2023 with the initial closing period for the first tranche of applicants being 2nd November 2023.
 - 3.10 In this initial phase 16 providers applied to join the new Framework. Following a robust evaluation process 10 providers (see appendix A) have been successful in meeting the criteria to join the Framework and are recommended to be appointed at this time.
 - 3.11 As this is an “open” arrangement there will be opportunities for providers to apply to join the Framework during its lifetime. It is recommended that decision to award new providers to the Framework subsequent to this initial decision is delegated to the Director of Adult Social Care in consultation with the Director of Resources, which will expedite the commencement of any contracts that were not established as part of the initial tender process and enable the appointment of any new providers onto the Framework as quickly as possible.

- 4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)**
 - 4.1 This Framework will support Council Plan priorities around people by ensuring people who are in need of care will be supported to the best of our ability to help empower them to achieve their ambitions.
 - 4.2 It will also support priorities around climate and economy. As part of the evaluation process to join the Framework, providers are asked to complete a social value question which includes commitments to positive environmental impacts and commitments to the Living Wage Foundation rate.
- 5. Consultation Outcomes**
 - 5.1 NA
- 6. Alternative Options Considered**
 - 6.1 This is an evolution of the current arrangements with the recommendation of a relatively short framework. The duration of this framework will allow for a comprehensive suite of options regarding the future delivery of homecare.
 - 6.2 There is an option not to adopt the Framework, however this would place the Council at significant risk of not being able to meet its statutory obligations under the Care Act 2014 and there would be risk that those who rely on these services would be at risk of harm.
- 7. Financial Implications and risk**
 - 7.1 Section recommendations included in this report are to Adopt the Open Framework Agreement For The Provision Of Homecare and Domiciliary Care Services and to appoint providers to this framework. This is for the recommissioning of the service and therefore is for activity which is already funded from base budget.
 - 7.2 The annual budget available for spend through this framework is £11.548m and is therefore sufficient to meet the expected spend over the life of the contract.
- 8. Legal and Governance Implications**
 - 8.1 The Public Procurement Regulations 2015 apply to the procurement and the Council has taken steps to ensure that a compliant process is undertaken to minimise the risk of challenge. The Council has undertaken an open procurement process to establish the framework in accordance with the Light Touch Regime.
 - 8.2 A robust Framework agreement together with terms and conditions for the provision of services is drafted in order to ensure that the services are to the required standard which includes a detailed specification which is aligned to relevant legislation and good practice pertaining to care. The procurement process and the contract complies with the provisions of the Contract Procedure Rules (part 3 section 7 of the Constitution) and in particular rules 6.11 to 6.12.8.

- 8.3 Clear and detailed safeguarding provisions are included in the contract to protect services users from harm. Monitoring responsibilities are clearly detailed in the contract which are drawn to flag issues early.
- 8.4 Advice has been taken on the application of The Transfer of Undertakings (Protection of Employment) Regulations 2006 to the new services.
- 8.5 External lawyers were appointed to act for the Council on this procurement in relation to procurement support and the drafting of the contract, on account of its value and complexity.
- 8.6 The decision contemplated by this report is a key decision as defined by the Council's constitution and as such the Cabinet is responsible for key decisions and the Cabinet Procedure Rules apply. All key decisions are to be published in advance in the forward plan taking care not to divulge commercially sensitive information including bidder information which may be commercially sensitive.
- 8.7 Pursuant to Part 2 section 6 of the Constitution (Officer Scheme of Delegation) The Director of Adult Social Care holds the statutory role for the Council of the Director of Adult Social Services (required by Section 6 of the Local Authority Social Services Act 1970). The Director of Adult Social Care has the full range of powers necessary to discharge the Council's functions, including taking decisions which are not specified in the Constitution or in law as having to be taken by elected members, implementing decisions and undertaking efficient management of the services and contracts and staff for which he/she is responsible in the functional and operational areas listed therein which include homecare.
- 8.8 Administrative and operational decisions regarding expenditure on individual adult social care packages, over the key decision threshold, are not subject to the Forward Plan requirements and call-in procedures.

9.0 Human Resources Implications

- 9.1 There are no direct Human Resources implications for the workforce within Westmorland and Furness, however as stated within the report providers, as part of the Framework evaluation process, are asked to commit to the Foundation Living Wage rate.

10. Equality and Diversity Implications (including the public sector equality duty, Armed Forces Families, Care Leavers and Health inequalities implications)

- 10.1 See Equality Impact Assessment – Screening Appendix B.

11. Background Documents

- 11.1 None

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Appendix A

Providers To be Appointed to Framework Agreement For The Provision of Homecare and Domiciliary Care Services

Provider
Lakeland Care
Eden Country Care Ltd
Bay Home Care Limited
Nasya Health Limited
Heydays care and Support Services
Bellcare Domiciliary Care Services Ltd
Beacon Homecare Services Ltd
Woke Healthcare Ltd
Glowing Care Ltd
Brown Glass Healthcare Services

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Decision

AQP Framework Agreement for Homecare Services: April 2024 - March 2027

Background and summary of Equality Advice

The decision is to procure AQP Framework Agreement for Homecare Services via an open tender exercise.

A screening Equality Impact Assessment has been completed to assess the potential risks to people who share a protected characteristic if the recommendation were not to be agreed.

In the event of the recommendation not being agreed a full Equality Impact Assessment would be required as there would be significant risk in paying due regard to the Public Sector Equality Duty.

Proposals to change the decision/policy/service/function

State proposed change: to procure the AQP Framework Agreement for Homecare Services for a period of two years plus potentially a 12 month extension.

Consultation

List consultation and consultees (completed and pending): not required for the screening EIA of this decision, but would be required for a Full Equality Impact Assessment.

Equality screening

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
General	Y	If the service is not re-commissioned there would be a disproportionate impact on all protected characteristics. The majority of service users for the targetd service will possibly have one or more of the protected characteristics.	1.This service is available to adults 18 years or over in Westmorland and Furness. This equates to over 80% of the population, therefore, many of the service users have one or more of the orotected characteristics. Equality and diversity was considered during the commissioning of	N

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
			the Framework Agreement and included in the final service specification and will be included in the terms and conditions.	
Age	Y	The majority of people affected by the decision are aged 18 years or older.	2.The service is aimed specifically at this age group	
Disability	Y	One of the cohorts of adults using this service are those with a disability or a Special Educational Need or Disability.	3. Homecare Services aim to deliver practical, personal, social and emotional support which will allow the Service User to lead a full qualitative life.	
Gender reassignment	Y	Less than 1% of referrals to the service identify as transgender. Therefore, some potential service users because of this characteristic have faced challenges through their life.	<p>4.The specification has a clause that requires service providers to have in place policies and procedures to deliver services in line with equalities requirements and that staff receive appropriate training. The specification also puts in place mechanisms for support for users in circumstances where they feel challenged and/or bullied because of a protected characteristic.</p> <p>Further in terms of inclusivity and diversity the specification states the following: There is no restriction as to the sex, gender or ethnic group of home care support staff. The Council expects all care staff to be treated with</p>	

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
			kindness and respect and will not tolerate abuse of staff.	
Marriage or civil partnership	Y	If the service is not re-commissioned there would be a disproportionate impact on this protected characteristic.	<p>5. 43% of the service users will possibly have this protected characteristic.</p> <p>The specification has a clause that requires service providers to have in place policies and procedures to deliver services in line with equalities requirements (Equality Act 2010) and that staff receive appropriate training.</p>	
Pregnancy or maternity	Y	If the service is not re-commissioned there would be a disproportionate impact on those service users identify as femaie	6. The specification has a clause that requires service providers to have in place policies and procedures to deliver services in line with equalities requirements (Equality Act 2010) and that staff receive appropriate training.	
Race	Y	Although under 3% of the adult population are from ethnic minority groups all those service users have been supported successfully through the current provision.	<p>7. See point 1 above.</p> <p>Additionally, regarding inclusivity and diversity the specification states the following: There is no restriction as to the sex, gender or ethnic group of home care support staff. The Council expects all care staff to be treated with kindness and respect and will not tolerate abuse of staff.</p>	
Religion or belief	Y	Over 50% of the adult population, that this	8. See point 1 above	

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		service caters for, ascribe to to religion or belief.		
Sex	Y	If the service is not re-commissioned there would be a disproportionate impact on those service users identify as femaie.	9. Regarding inclusivity and diversity the specification states the following: There is no restriction as to the sex, gender or ethnic group of home care support staff. The Council expects all care staff to be treated with kindness and respect and will not tolerate abuse of staff.	
Sexual orientation	Y	Less than 1% of referrals to the service identify as LGBTQ+. Therefore, some potential service users because of this characteristic have faced challenges through their life. ASC – Please comment on how this PrC is monitored among provider’s staff.	10. See point 6 above.	
Rurality	Y	Westmorland and Furness has an average population density of 60 people per square km; much more sparsely populated than the national average (395 people per square km).	11. See point 1 above. Further, within the specification a three-tier rate banding to support equity of delivery in rural areas of Westmorland and Furness has been included.	
Socio-economic status	Y	The Homecare service accommodtates those adults living in poverty via a care needs assessment and means test. Twelve communities (LSOAs) in Westmorland and Furness fall within the 10% most deprived of areas in England; these communities are all	12. See point 1 above Further, within the specification there is a clause that requires providers to collate and provide equalities information on people who use the services. This will support identifying the characteristics of	

Equality characteristic	Impact Y/N	Describe Impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		located within Barrow-in-Furness. It is generally in these deprived areas that unemployment and crime rates are higher, while household incomes and educational attainment are lower and health outcomes can be poor.	people accessing the service and any barriers to entry.	
Armed-forces personnel/vetrans	Y	Although only over 3% of the adult population are Armed-forces personnel/vetrans, all those service users with this protected characteristic have been supported successfully through the current provision.	13. See points 1 and 12 above.	

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Tier Areas

- Tier 1 Overlay
- Tier 2 Overlay
- Tier 3 Overlay

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WESTMORLAND AND FURNESS COUNCIL

Cabinet

Report Title	Marina Village, Barrow in Furness
Date of Meeting	23 January 2023
Report Author	Gareth Candlin
Director	Angela Jones – Director of Thriving Places
Lead Cabinet Members	Cllr Jonathan Brook - Leader Cllr Andrew Jarvis – Cabinet Member for Finance Cllr Virginia Taylor – Cabinet Member for Sustainable Communities and Localities Cllr Judith Derbyshire – Cabinet Member for Housing and Homelessness
Why is this a key decision?	<p>1. an executive decision which is likely to result in the Council incurring expenditure which is, or the making of savings which are, significant having regard to the Council’s budget for the service or function to which the decision relates. NO</p> <p>2. or is likely to be significant in terms of its effects on communities living or working in an area comprising two or more wards in the area of the Council. For these purposes, savings and expenditure are “significant” if they are equal to or greater than £500,000. YES</p> <p>For clarification, no treasury management decision shall constitute a Key Decision.</p>
Wards Affected	Old Barrow and Hindpool Ward
Identify exempt information and exemption category	<p>Note – In accordance with Section 100B(2) of the Local Government Act 1972, copies of Appendix 3 to this report are excluded from inspection by members of the public as the report contains information as described in Schedule 12A of the Act, as amended by the Local Government (Access to Information) (Variation) Order 2006, as follows:-</p> <p><i>Information in respect of which a claim to legal professional privilege could be maintained in legal proceedings (Paragraph 5)</i></p> <p>In all the circumstances of the case, the public interest in maintaining the exemption outweighs the public interest in disclosing the information.</p>
Reasons for urgency (only where applicable)	N/A
Appendices (if any)	<p>Appendix 1 Site Plan of Third Party Land Requirements Appendix 2 Marina Village Site Plan Appendix 3 Part II Legal Advice – Risk Report Appendix 4 Part II Homes England Award Letter Appendix 5 Equality Impact Assessment</p>

1. Executive Summary

- 1.1 Marina Village is a brownfield development site, the majority of which is owned by Westmorland and Furness Council, and which is located in the Old Barrow and Hindpool Ward in Barrow and Furness, situated between Cavendish Dock Road and Salthouse Road (“the Site”). It is allocated in the Barrow Borough Local Plan for housing development and has an indicative yield of 650 homes within the plan.
- 1.2 This report seeks to update Cabinet on progress with bringing this important development site forward to delivery (“the Marina Village Scheme” / “the Scheme”). Specifically, it seeks authority to negotiate and enter into the grant funding agreement (GFA) to draw down the Homes England Grant Funding contribution of £24.840m. This funding is required to support the remediation of the Site and the delivery of infrastructure required to de-risk the Scheme and enable the Council to procure a delivery partner or partners for the Scheme. This report therefore seeks authority to delegate the required powers to officers to progress negotiations on the draft GFA and to enter into the GFA once a final draft has been agreed between the Council and Homes England.
- 1.3 This report seeks authorisation from Cabinet to commence public consultation on a draft supplementary planning document (SPD) for the Site, with a view to the subsequent adoption of that SPD at a future Cabinet meeting. The Council’s objective, in preparing and adopting the SPD, is to provide more clarity to potential future partners on the Council’s aspirations for the Site and to give comfort to Homes England that the required number of homes can be achieved on the Site.
- 1.4 This report also seeks acceptance of the principle of repayment by the Council to Homes England, of a proportion of the grant funding from the future capital receipt for the land, once achieved.
- 1.5 This report also seeks delegated authority to enable officers to prepare and submit an application for outline planning permission for the Scheme, as well as to agree a planning and delivery strategy, to further improve the control the Council will have over the development being brought forward, and to improve the marketability of the Site.
- 1.6 Finally, this report seeks delegated authority to enable officers to enter into and progress commercial negotiations to acquire by agreement land which is located within the Site, but which is currently owned by third parties (“third party land interests”). Please refer to the Site Plan of Third Party Land Requirements’ at Appendix 1 to this Report for more details. The acquisition of the third party land interests is required to enable the Council to assemble all of the land necessary to facilitate the delivery of the Scheme on the Site. In the event that it is not possible to acquire the third party land interests by agreement within the timescales associated with the GFA, the Council will consider using its compulsory purchase powers to enable programme deadlines to be met. Should that approach to land assembly be necessary in due course, Cabinet authority for the making of a compulsory purchase order (CPO) would be sought at the relevant time.

2. Recommendations

For the reasons set out in this report, Cabinet is recommended to:

- 2.1 Having considered this report and Appendix 3 and Appendix 4, delegate authority to the Director of Thriving Places in consultation with the Director of Resources and Chief Legal and Monitoring Officer, the Leader, Cabinet Member for Finance, Cabinet Member for Housing and Homelessness and Cabinet Member for Sustainable Communities, to negotiate, finalise and enter into the Grant Funding Agreement (GFA) with Homes England for the value of £24.840m.
- 2.2 Having considered this report and Appendix 3 and Appendix 4, agree to accept the £24.840m Homes England investment through the Brownfield Infrastructure and Land Fund, acknowledging the associated risks and responsibilities referred to in this report (but noting that if any material risks not referred to in this report arise prior to entering into the GFA they will be reported back to Cabinet prior to the GFA being entered into).
- 2.3 Having considered this report and Appendix 3 and Appendix 4 agree to repay through the capital receipt for the Site, a contribution for the site infrastructure to Homes England up to a maximum amount of £3.052m.
- 2.4 Delegate authority to the Director of Thriving Places in consultation with the Leader, Cabinet Member for Finance, Cabinet Member for Housing and Homelessness and Cabinet Member for Sustainable Communities and Localities to agree the final draft of the supplementary planning document (SPD) and authorise the commencement of the public consultation on the SPD.
- 2.5 Delegate authority to the Director of Resources to develop and submit an application, under the Town and Country Planning Act 1990, for outline planning permission for the Scheme.
- 2.6 Delegate authority to the Director of Thriving Places in consultation with the Director of Resources and Chief Legal and Monitoring Officer and the Leader, Cabinet Member for Finance, Cabinet Member for Housing and Homelessness and Cabinet Member for Sustainable Communities and Localities to agree the planning and delivery strategy for the Scheme.
- 2.7 Authorise the Director of Thriving Places in consultation with the Director of Resources and Chief Legal and Monitoring Officer to enter into and progress commercial negotiations to acquire by agreement the third party land interests identified on the Site Plan of Third Party Land Requirements at Appendix 1 to this Report, to facilitate the assembly of all of the land necessary for the delivery of the Scheme on the Site.
- 2.8 Authorise the Director of Thriving Places in consultation with the Director of Resources and Chief Legal and Monitoring Officer to make any future change request through the change request process outlined in the Grant Funding Agreement as may be required during the life of the grant (but noting that if any material risks not referred to in this report relate to such change request they will be reported back to Cabinet prior to the relevant change request being concluded).

3. Information: The Rationale & Evidence for the Recommendations

Site History

- 3.1 Marina Village is a 25-hectare brownfield site in Barrow-in-Furness on the north side of Buccleuch Dock (Site plan identified in Appendix 2). The Site currently consists of an area of unused open scrubland within the central area of the site. Towards the northwest of the Site, there are commercial premises around Cavendish Dock Road and hardstanding areas along the northern boundary with Salthouse Road.
- 3.2 The adopted Barrow Borough Local Plan identifies this Site as a strategic housing allocation which has an indicative yield of 650 homes. It accounts for a little over one third of the total allocated housing to 2031 within the Barrow Borough Local Plan and is one of the largest housing sites within the new Westmorland and Furness Authority.
- 3.3 The Site is in a prominent location, situated close to the town centre and major employment sites such as BAE Systems located on Barrow Island, the Waterfront Business Park and the Port of Barrow.
- 3.4 Almost all of the Site is in Westmorland and Furness Council's ownership; however, as noted above, a small number of land parcels are in private ownership and negotiations with the third-party landowners are currently in progress with the aim of securing the acquisition of these by agreement.
- 3.5 Most of the Site was originally claimed from tidal flat deposits in the mid-19th century by upfilling, reportedly using dredged material from Walney Channel, during the construction of the adjacent dock system. The Site was subsequently developed as railway land, with railway sidings, and works present within the central areas of the site, and a timber yard within the southern area of the Site. The railway sheds, works and associated infrastructure were demolished in the 1980s with much of the Site remaining as open unused land since that time.
- 3.6 The redevelopment of Barrow's waterfront was a long-held ambition for Barrow Borough Council spanning more than two decades. Success has been realised through the completion of the Waterfront Business Park on Barrow Island, and the attraction of major offshore wind investors to the Port of Barrow, however, progress stalled on the major housing allocation following the 2008 recession and public spending austerity measures.
- 3.7 Realisation of this element will deliver significant change on the Site itself and deliver wider benefits in terms of investor confidence to the rest of the town. As such, it is a vital part of Barrow's wider regeneration agenda. The project has come more sharply into focus with the development of Team Barrow and the ongoing discussions with Government around how the Town and wider geography can best support BAE Systems' delivery of key defence infrastructure.
- 3.8 Significant progress has been made in the past two years in assembling the funding package required to address site complexities and unlock the potential for development. £8m of funding has been secured to date which

includes Local Growth Funding, and this has allowed the remediation works of phase one of the Site to be successfully delivered.

Homes England Grant Funding

- 3.9 In July 2023 Homes England formally announced the launch of the Brownfield Infrastructure Land Fund, although the fund had long been known about and preparation for a bid was in development by Barrow Borough Council prior to vesting day, working in partnership with Homes England to develop a Strategic Outline Case (SOC).
- 3.10 Westmorland and Furness Council continued with this work post vesting day and have been progressing proactively with Homes England. In August of 2023 the Scheme's SOC was approved by Homes England and work began to further develop the Scheme to a Full Business Case (FBC). The FBC was submitted in December 2023 and approved by Homes England Investment board on 20th December 2023.
- 3.11 The FBC set out the rationale for the investment of £24.840m in the Site to unlock an increased housing yield of circa 800 new homes. The 800 homes represent an increase from the 650 allocated in the Local Plan which is brought about by a different approach to the density of the Site to include apartment living as well as traditional housing. The FBC was agreed on the basis that the Council would use the funding to deliver the following items:

Cost Estimate	Amount £m
Phase 2 Site works & remediation	12.270
Ecological Surveys and translocations	0.900
Project Costs (service diversions, traffic management Knotweed removal)	1.260
Cavendish Dock Road upgrade	2.600
Design Team Fees, Prelims, Consultant fees, Council Project Management costs, Contractor profit and overheads.	2.940
Works Cost Estimate	19.970
Contingency 14%	2.790
Inflation Allowance 9.1%	2.080
Total Base Cost	24.840

- 3.12 To draw down this funding the Council must enter into a grant funding agreement (GFA) with Homes England which will clearly set out the roles and responsibilities of each party as well as the outputs the Council will be obliged to deliver in consequence of accepting the funding.
- 3.13 By entering into the grant funding agreement, the Council is also agreeing that it will be legally responsible and accountable for delivering the outputs of the Scheme, any cost overruns incurred in doing so, and be subject to the risk of clawback from Homes England for non-delivery.

- 3.14 The risk of clawback to the Council is for the full grant amount of £24.840m but only in certain situations and, in terms of delivery, there are provisions relating to potential extensions of time.
- 3.15 Cabinet is referred to the legal report at confidential Appendix 3 for more detail on the terms of the GFA.

Capital Receipt of the Land

- 3.16 As part of preparing the FBC, Homes England needed to make a series of assumptions about the amount of the grant that can be recovered once the Council receives a capital receipt (sells the land) within the Site. This was required to calculate an accurate Benefit Cost Ratio (BCR) for the purpose of the FBC appraisal. The principle at play is if a large sum of public money is being invested in the Site via Homes England that a proportion of that funding should be repaid when a profit is realised for the Site, thus reducing the overall amount of public grant required and improving the BCR.
- 3.17 For the purposes of the FBC Homes England employed consultancy firm Lambert Smith Hampton to make an initial future valuation of the land based on 800 units. This resulted in assumed land sales receipts of £8.650m, subject to housing delivery on the Site being realised. Homes England have agreed in principle that the Council can retain £4.000m of these receipts to fund the relocation of the Salthouse Road waste depot and £0.300m to cover the cost of the outline planning application and £1.298m to cover other potentially incurred costs. This results in the amount of £3.052m (at 2023 values) repayable to Homes England from the capital receipts for the land. It is important to note that if this value does not materialise because of market conditions or other reasonable factors the Council would need to discuss reducing this with Homes England.

Draft Supplementary Planning Document and Outline Planning Application

- 3.18 Barrow Borough Council had been working with Cushman and Wakefield to prepare a masterplan which sets out a development framework and design guide for the Site. As part of the GFA the Council is required to ensure that the outputs (800 homes) are protected in planning terms and adopting the masterplan as a Supplementary Planning Document (SPD) is one way to achieve this requirement. Following an internal review, the masterplan is being amended into a draft SPD. If adopted, the Marina Village SPD will have an important role in facilitating the transformation of the Site into a modern, attractive and desirable place to live.
- 3.19 The draft SPD identifies an indicative yield of 800 dwellings for the Site, significantly more than that identified in the Local Plan. This will boost the supply of housing in Barrow and allow delivery of a mix of good-quality housing, including affordable housing, therefore diversifying Barrow's housing offer.
- 3.20 The SPD will support the Council's Vision for Westmorland and Furness to be 'a great place to live, work and thrive' by: Facilitating the delivery of "housing for all, making best use of previously used land"; "Welcoming, proud and resilient communities"; and supporting "a growing workforce and high-quality jobs" by providing a high-quality choice of housing.

- 3.21 The draft SPD contains a vision, objectives, design principles and a design guide, including an illustrative masterplan, taking account of several factors including the historic environment, landscape, sustainable drainage, public realm, energy and infrastructure. This includes Climate and Environmental factors, the impacts of, and associated mitigation proposals for which, will be considered and assessed as part of the planning application process, and by developers or investors, using the latest data available.
- 3.22 If the delegation in recommendation 2.4 is approved by Cabinet, public consultation will take place on the draft SPD for six weeks. Responses will be assessed and if any amendments are required, the draft will be updated. It is anticipated that the SPD will be brought back to Cabinet in spring of 2024 to be adopted in accordance with The Town and Country Planning (Local Planning) (England) Regulations 2012.
- 3.23 To further protect the Council's strategic ambition for the Site and increase the attractiveness to a development partner or partners the advice from our housing delivery advisors (Savills) is to prepare and submit an application for outline planning permission for the Site. This will allow the Council to increase its control over the final outcomes for the Site and ensure that future developer partners are held to the standard of development the Council expects to see for a flagship site. It is anticipated the cost of the preparation of the outline permission is £0.300m.

Future role for the Council in delivering Marina Village (Planning and Delivery Strategy)

- 3.24 The Council, as landowner, can shape future delivery and derive best value from the land through agreement of its Planning and Delivery Strategy for the Site. This is also required by Homes England as a pre-condition to the GFA to detail at a high level how the Council intends to deliver the 800 homes on the back of the £24.840 investment.
- 3.25 The Council has engaged specialist housing delivery advisors to assist with this. It is expected that, given the lack of delivery capacity within the Council for this type of development, a partner or partners will need to be procured to help deliver the Scheme and to realise the Council's vision for the development.

Use of compulsory purchase powers

- 3.26 To deliver the ambition for the Site the Council needs to obtain the ownership of the third-party land identified in Appendix 1. Commercial negotiations are ongoing, and it is hoped that these will be progressed to enable the Council to achieve ownership of the Site in its entirety within the timescales necessary to enable compliance with the delivery programme associated with the GFA.
- 3.27 However, if a commercial solution to obtain all or any of the third party land interests is not achievable within the requisite timescales, the Council will need to use its compulsory purchase powers to acquire the necessary land. This strategy would only be deployed as a last resort. However, given the lengthy timescales associated with making a compulsory purchase order (CPO), the Council may consider taking preparatory steps towards the making of a CPO as a contingency, in parallel with continuing to progress

negotiations by agreement. Should that approach to land assembly be necessary in due course, Cabinet authority for the preparation and making of a compulsory purchase order (CPO) would be sought at the relevant time.

- 3.28 In the meantime, the acceptance of recommendation 2.7 above will give the relevant officers the necessary delegations to progress commercial negotiations with the objective of acquiring the third party land interests by agreement.

4. Link to Council Plan Priorities: (People, Climate, Communities, Economy and Culture, Customers, Workforce)

- 4.1 **People** – Delivery of Marina Village will have an important role in delivering improved environmental quality and good quality housing. The development will also connect to Barrow’s movement network.
- 4.2 **Climate** – The masterplan includes a large nature conservation area, home to protected species. There is reference to the creation of wetlands and ponds in connection to this area as part of sustainable drainage. There is an opportunity to deliver greener homes and encourage developers to move towards net zero deliverability.
- 4.3 **Communities** – Local communities have been consulted and informed throughout the process of site allocation and on-site works and will continue to be going forward. Public consultation will also take place on the Draft SPD.
- 4.4 **Economy and Culture** – Development will underpin BAE Systems ability to attract workers from outside the area to live in Barrow and encourage existing workers to stay, therefore retaining young people and attracting investment and skilled people.
- 4.5 **Customers** – the investment in Marina Village will attract new communities and customers into Barrow. Delivery of a large-scale housing scheme will help deliver the Council’s obligations against its housing allocation and support the ambitions of communities and customers.
- 4.6 **Workforce** – delivery of Marina Village will enhance the local workforce, it will directly support BAE Systems’ growth plans and encourage wider economic growth within Barrow, including further Town Centre investment.

5. Consultation Outcomes

- 5.1 The allocation of the site for housing was consulted on as part of the development of the Barrow Borough Local Plan in 2018.
- 5.2 The supplementary Planning Document (masterplan) will also be subject to public consultation and engagement.
- 5.3 Further, the outline planning application will also be subject to a statutory consultation period.

6. Alternative Options Considered

- 6.1 The alternative to securing Homes England funding is to seek private sector investment. Due to the presence of abnormal development costs and low

residential market values in Barrow, the private sector will not deliver the housing development without public sector support. Various development appraisals have confirmed this, and significant progress has been made in the past two years in assembling the funding package required to address site complexities and unlock the potential for development.

7. Financial Implications and risk

7.1 In agreeing to accept the £24.840m Cabinet are asked to acknowledge the associated risks and responsibilities attached to the funding that will be set out in the GFA. These risks include:

- Cost overrun – there is a risk that the costs of the project escalate and under the terms of the funding Homes England would not provide additional funding. To help mitigate this risk the cost estimate includes £2.790m of contingency and £2.080m of inflationary uplift. In addition, active monitoring of the project expenditure against budget will identify if this risk could materialise and allow for early intervention to reduce costs or allow appropriate decision making to increase the funding envelope for the scheme through additional funding being identified.
- Clawback – there is a risk that Homes England could clawback any funding that has been spent should the Council fail to meet the terms of the GFA. To mitigate this the delegated officer will consider each of the clawback risks and mitigations prior to entering into the GFA and will report back to Cabinet on any material risks which either cannot be mitigated or which are not referred to in this report.
- Capital receipt – there is a risk that the anticipated capital receipt is not achieved for the site and the Council is unable to retain the £4.000m ringfenced for the cost of relocating the Barrow depot, retain the £0.300m to replace the forward funding required to obtain outline planning permission plus the £1.298m to cover potential other costs. As a result, there would be insufficient to reimburse Homes England the £3.052m. To mitigate the risk the Council will need to discuss reducing this with Homes England during negotiations of the GFA and report back to Cabinet should that not be able to be negotiated. To mitigate the risk of the depot relocation costs not being met then the relocation should be dependent on the sale of the land or alternative sources of funding may need to be identified to support some or all of the cost of the relocation.
- Compulsory Purchase Order – there is a risk that the Council is unable to acquire the relevant parcels of land through negotiation and may need to consider exercising its compulsory purchase powers. There is sufficient funding ringfenced within Barrow Town Deal and within the contingency sum included in the £24.8m Homes England funding to meet this cost and mitigate the potential risk of this.

7.2 The Council is required to forward fund £0.300m to develop and submit an application for outline planning permission, this is to be funded from the existing Marina Village (Stage 1) scheme within the capital programme 2023-2028 and will be reclaimed from the Homes England funding once the GFA has been signed and the conditions to draw down of funding satisfied. There

is a risk that should the GFA not be signed, and the Scheme not go ahead, that these costs may need to be recategorised as revenue expenditure. The Council has a revenue contingency budget that would need to be utilised if this risk materialised.

- 7.3 Should Cabinet not agree to enter into the GFA to accept the funding there is a risk that no alternative source of funding would be available to deliver the Scheme which could impact on the Council's ability to meet its ambition to redevelop the Barrow Waterfront.
- 7.4 The Council will work to agree and enter into the GFA and, where it has approvals in place to do so, take the necessary steps to obtain planning permission and develop a planning and delivery strategy for the Site and seek Homes England's agreement (which they will need to consider and seek approval to at the time) to future changes to the GFA as required over the life of the grant. These actions would provide mitigations in respect of the risk of the Scheme not being delivered and the £24.840m funding being invested in Marina Village.

8. Legal and Governance Implications

- 8.1 The Council has the power to enter into the GFA, and implement the recommended decisions at 2.2 and 2.3 of this report, pursuant to section 1 of the Localism Act 2011.
- 8.2 The report at confidential Appendix 3 sets out a summary of the key risks in the template form of GFA which will be reviewed and mitigations considered pursuant to the authority delegated under recommendation 2.1 of this report. Cabinet is also referred to confidential Appendix 4 when reviewing the legal report on the template GFA.

9. Human Resources Implications

- 9.1 There are adequate resources with the support of external consultancy support to deliver this project.

10. Equality and Diversity Implications (including the public sector equality duty, Armed Forces Families, Care Leavers and Health inequalities implications)

- 10.1 Westmorland and Furness Council will ensure, where it lies within its powers, that the Marina Village development is planned and delivered without any form of discrimination in terms of age, disability, gender, marital status, maternity, race or ethnicity, faith/belief or sexuality and make sure that there are no barriers that would limit participation by under-represented groups.
- 10.2 An Equality Impact Assessment (EIA) screening has been carried out (Appendix 5) to provide an assessment of the likely impact of the Marina Village development and to pay due regard to the Equality Duty, with no negative impacts identified at this stage. A full Equality Impact Assessment will take place as the scheme progresses, throughout the public engagement, consultation and planning process and as policy and investment decisions are made.

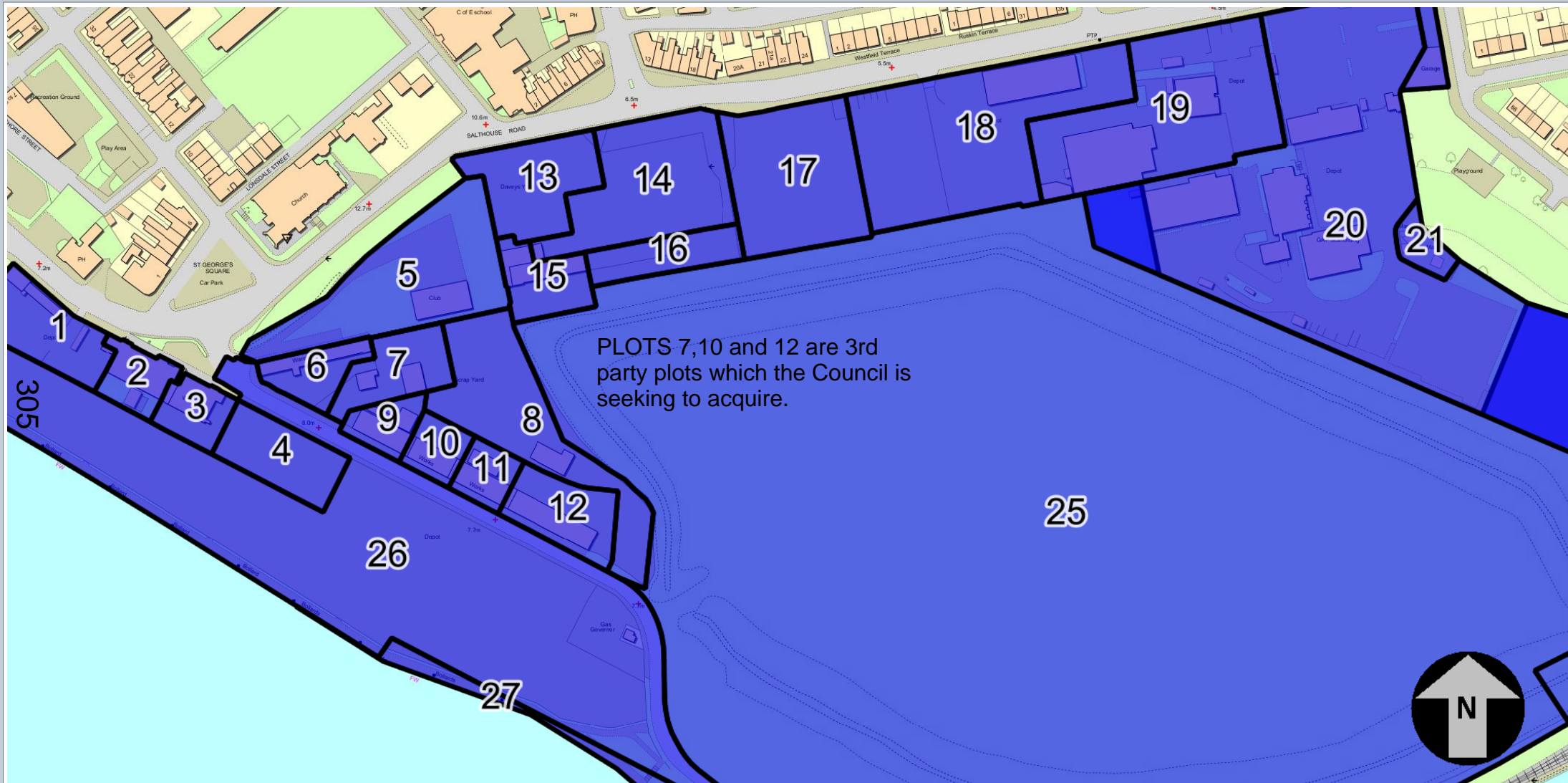
11. Background Documents

11.1 None attached.

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Marina Village Site

Plot Numbers 7,10 and 12

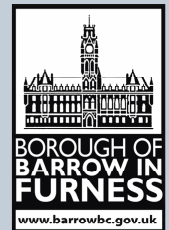
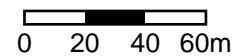


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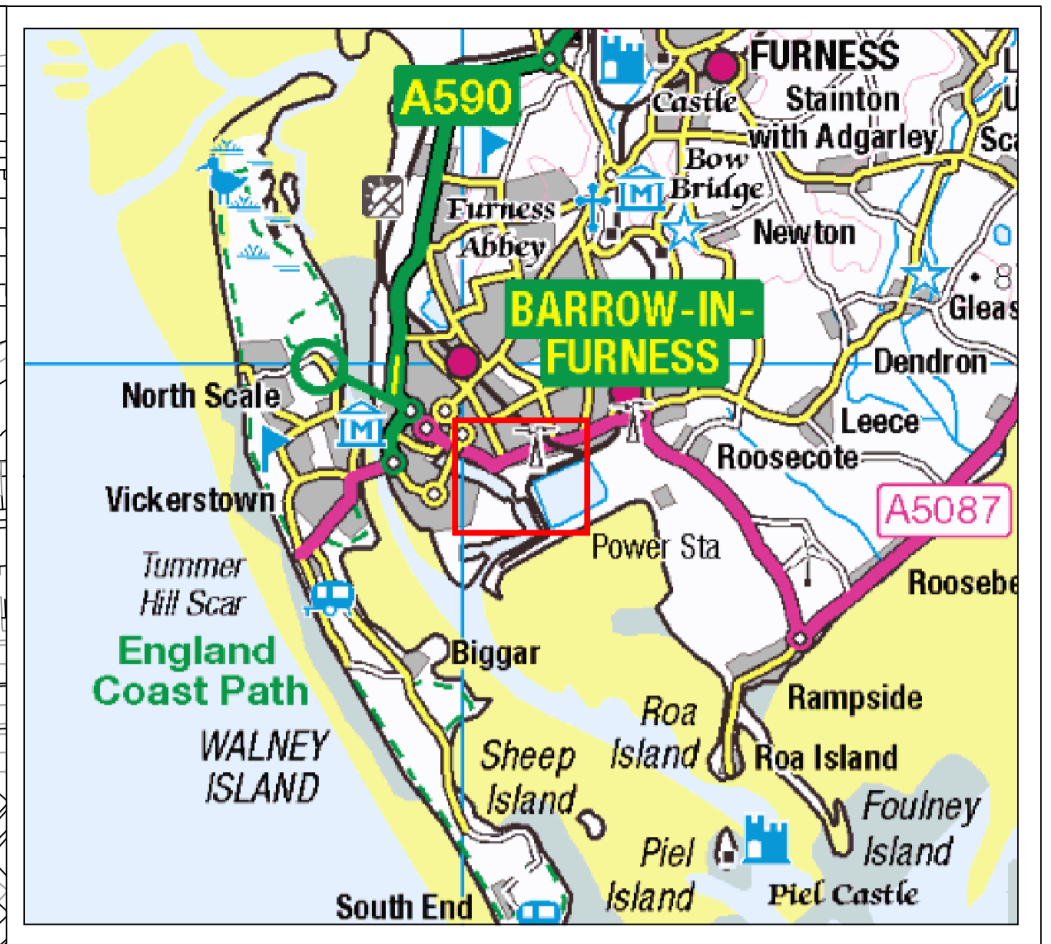
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2021/0654



- KEY:
- Planning Red Line Boundary
 - Other Land Owned by Barrow Borough Council

Rev	Drawn	Chkd	App'd	Description	Date
02	SH	CB	AW	For Issue	31/08/2021
01	SH	CB	AW	For Issue	26/08/2021

Purpose of Issue
S4 - Issued for Planning

Classification
Public

Client
Barrow Borough Council

Project
Marina Village Remediation

Drawing
Site Location Plan

Scale @ A1	Drawn	Checked	Approved
1:2,500	SH	CB	AW

Project No	Date
CS099750	31/08/2021

Drawing Identifier	Revision
MVSR-CAP-GEN-00-DR-V-0006	P02

CAPITA
 Property and Infrastructure

Englishgate Plaza, Botchergate, Carlisle, CA1 1RP
 T 01228 673000 www.capita.co.uk/property
 Capita Property and Infrastructure Ltd.

307

Plot date: 31/08/2021

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By virtue of paragraph(s) 5 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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of the Local Government Act 1972.

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Equality Impact Assessment (EqIA) Proforma

Equality Impact Assessment (EqIA) Proforma

An EqIA is a tool to assess whether a decision, policy, service or function pays 'due regard' to the Public Sector Equality Duty (PSED).

This Duty requires public bodies to:

- Eliminate discrimination
- Advance equality of opportunity
- Foster good relations

The Equality Duty covers the following **9 protected characteristics**:

Age, disability, gender reassignment, pregnancy and maternity, race, religion or belief, sex, sexual orientation, marriage and civil partnership. In addition, this EqIA process includes; **care experience, rurality, socio-economic status** and the **armed forces community**.

The EqIA process has two stages:

- **Screening EqIA:** This checks whether a decision, policy, service or function pays due regard to the Equality Duty; to provide any high-level advice or take immediate action; to determine if a full EqIA is required.
- **Full EqIA:** Sometimes called Equality Analysis, this looks at a decision, policy, service or function with supporting data, information, research and evidence from consultation/engagement. The EIA covers the nine protected characteristics as well as rurality, socio-economic status, care experience and armed forces personnel/ veterans. A full EqIA includes an action plan.

Where an EqIA relates to a Council Member Decision it should be included as an appendix to the committee report.

Equality Impact Assessment – Screening

1) Decision/Policy/Service/Function

Marina Village, Barrow – Decision

2) Background and summary of Equality Advice

The purpose of the decision is to accept Homes England funding of £24.8m to remediate and enable the site at Marina Village, Barrow, for future housing development, providing up to 800 homes. Going forward, through the development and execution of the planning and delivery strategy, it will be important to ensure the development provides housing for all within our communities.

At this stage, because the decision is primarily to secure the investment into the site, it has been felt appropriate to carry out an initial screening assessment, where no negative impacts have been identified. As the project progresses into planning and delivery, a full Equality Impact Assessment will be carried out to ensure that the development meets the needs of the community and the process undertaken does not discriminate against people with protected characteristics or limit participation by under-represented groups.

3) Consultation

There will be public consultation to develop the Supplementary Planning Document (SPD) for the site, as well as with a number of statutory consultees. Public engagement and engagement with the market will be held moving forward to determine and shape the most appropriate housing development – it is essential that this is accessible to all.

4) Equality screening

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
Age	Y	People of all ages will benefit from the overall investment in Marina Village. While the exact mix of housing will not be brought forward to decision until the Planning phase the intent is to ensure that all	Assessment of housebuilders proposals when setting out their plans for the site, in terms of their viability and how closely they meet the aspirations set out in the Supplementary Planning Document. Also to explore ways in which	Y

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
		communities of all ages are able to access housing in Marina Village.	additional public and private investment might be able to realise a greater proportion of affordable homes on the site.	
Disability	Y	New Housing will be compliant with Disability Legislation to ensure that access is not restricted within the new properties.	Assessment of provision through Development Control once housing units are completed	Y
Gender reassignment	N	There is no evidence that Marina Village will impact this characteristic.		
Marriage or civil partnership	N	There is no evidence that Marina Village will impact this characteristic.		
Pregnancy or maternity	N	There is no evidence that Marina Village will impact this characteristic.		
Race	N	People of all races will benefit from the overall investment in Marina Village.		
Religion or belief	N	There is no evidence that Marina Village will impact this characteristic.		
Sex	N	There is no evidence that Marina Village will impact this characteristic.		
Sexual orientation	N	There is no evidence that Marina Village will impact this characteristic.		

Equality protected characteristic	Impact Y/N	Describe impact (if Yes)	Measures to address impact (if Yes)	Full EqIA needed Y/N
Care Experience	N	There is no evidence that Marina Village will impact this characteristic.		
People in rural areas	N	People in rural areas will be able to access housing in Marina Village if they choose to relocate to the new site.		
Socio-economic status	N	Marina Village housing units will be sold via the open market, this therefore will exclude some communities due to their socio-economic status.		
Armed-forces personnel/veterans	N	There is no evidence that Marina Village will impact this characteristic.		
General (other considerations)	N/A			

5) Full EqIA required (evidence of substantial impact)?

Yes

No

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