

Tuesday, 30 January 2024

**OVERVIEW AND SCRUTINY BOARD**

A meeting of **Overview and Scrutiny Board** will be held on

**Wednesday, 7 February 2024**

commencing at **5.30 pm**

The meeting will be held in the Grace Murrell Room C, Riviera International Conference Centre, Chestnut Avenue, Torquay TQ2 5LZ

**Members of the Committee**

Councillor Steve Darling (Chairman)

Councillor Brook

Councillor Long

Councillor Cowell

Councillor Strang

Councillor Joyce

Councillor Tolchard

Councillor Law

Councillor Twelves (Vice-Chair)

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# OVERVIEW AND SCRUTINY BOARD AGENDA

1. **Apologies**  
To receive apologies for absence, including notifications of any changes to the membership of the Board.
2. **Minutes** (Pages 4 - 7)  
To confirm as a correct record the minutes of the meeting of the Board held on 10 January 2024.
3. **Declarations of Interest**
  - a) To receive declarations of non pecuniary interests in respect of items on this agenda  
  
**For reference:** Having declared their non pecuniary interest members may remain in the meeting and speak and, vote on the matter in question. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.
  - b) To receive declarations of disclosable pecuniary interests in respect of items on this agenda  
  
**For reference:** Where a Member has a disclosable pecuniary interest he/she must leave the meeting during consideration of the item. However, the Member may remain in the meeting to make representations, answer questions or give evidence if the public have a right to do so, but having done so the Member must then immediately leave the meeting, may not vote and must not improperly seek to influence the outcome of the matter. A completed disclosure of interests form should be returned to the Clerk before the conclusion of the meeting.  
  
**(Please Note:** If Members and Officers wish to seek advice on any potential interests they may have, they should contact Governance Support or Legal Services prior to the meeting.)
4. **Urgent Items**  
To consider any other items that the Chairwoman decides are urgent.
5. **Performance Monitoring 2023/2024 Quarter 3** (To Follow)  
To review the Council's key performance indicators and make recommendations to the Cabinet.
6. **Budget Monitoring 2023/24 – Quarter 3 Revenue and Capital Outturn Forecast** (Pages 8 - 22)  
To consider the submitted budget monitoring report for Quarter 3 and make recommendations to the Cabinet/Council.
7. **Revenue and Capital Budget 2024/2025 - Report of the Overview and Scrutiny Board** (To Follow)  
To agree the final report of the Priorities and Resources Review 2024/2025 on the Revenue and Capital Budget for 2024/2025.

**8. Events, Culture and Tourism Review - Report of the Overview and Scrutiny Board** (Pages 23 - 41)

To agree the final report of the Events, Culture and Tourism Review, having regards to any feedback from the Priorities and Resources Review Panel.

## **Minutes of the Overview and Scrutiny Board**

**10 January 2024**

**-: Present :-**

Councillor Steve Darling (Chairman)

Councillors Brook, Cowell, Fellows, Law, Long, Maddison, Strang and Twelves

(Also in attendance: Councillors Bye, Chris Lewis and David Thomas)

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### **36. Minutes**

The minutes of the meeting of the Board held on 13 December 2023 were confirmed as a correct record and signed by the Chairman.

### **37. SWISCo Annual Report**

The Cabinet Member for Pride in Place, Culture & Events and Parking, Councillor Billings, the Chair of the SWISCo Board, Alan Denby, and the Lead Officer for SWISCo, Lisa Tuck, provided a brief overview of the Annual Report for SWISCo for 2022/2023 and responded to the following questions:

- why was the full business plan and risk register not included within the paperwork;
- the green waste service had been operating for a year, how many people had signed up for the second year and what action was being taken to increase take-up;
- were any incentives being offered to increase take-up of green waste collection;
- had the Council considered promoting green waste collection through the Council Tax leaflet or at remote collection locations;
- what was the original take up figure for green waste collection and how many people have re-signed up (a written response to be provided);
- had the Council considered a refer a friend scheme for green waste collection;
- why didn't the covering report reference the good work SWISCo do employing people with learning disabilities and care experienced young people etc. under the equalities section;
- how was SWISCo communicating that people could get a smaller green waste bin if they needed one;
- why was there not more detail on the capital investment programme, where it started and where it was now;
- what was happening about the future of the service and how could Overview and Scrutiny take an active role in this work;

- there was limited information regarding highways finances and prioritisation for repairs and maintenance;
- when would SWISCo be cutting the grass and could information be published on the website, once known, on the dates and areas for this, if possible with residents able to put in their postcodes to see when it was due;
- what action was being taken to do the work of the former Community Engagement Officer;
- how did SWISCo track energy changes (a written response would be provided);
- did the sensors in the bins detect smelly waste or just full bins and could people scan the QR code and report smelly bins so they could be emptied sooner;
- how was the campaign with the sensors in the bins going and had they been added to the bins in Babbacombe (a written response would be provided);
- what was preventing the weed spraying and what was the current programme for this (a written response would be provided);
- did the staff satisfaction results include agency and how did agency numbers impact on the results (a written response would be provided);
- why did the report not refer to outsourcing the out of hours team and what action was being taken to monitor performance of this;
- why were issues impacting on the stream by the Waste Transfer Station and the issues with the Environment Agency not included in the report;
- why did the report not include much detail about commercial waste and driving forward that data;
- where was SWISCo using agency staff and where were there vacancies;
- SWISCo were tasked to work with friends groups to develop parks plans, schedules, who was responsible for what, what plans there were, investment in new equipment etc. to put in parks notice boards what progress had been made on this;

Members requested a briefing note to be circulated to all Members on weed spraying so that they can understand about the times of year to carry this out and how we deploy the equipment and help inform their communities.

The Board heard from Margeret Forbes-Hamilton, Chair of the Torre and Upton Community Partnership and Chair of Torbay Greenspace Forum regarding delivery against the business plan and concerns in respect of community engagement and support. Mrs Forbes-Hamilton also requested an update on the progress of the Open Space Strategy.

The Board thanked SWISCo staff for their hard work and commitment working in all weathers and welcomed the ethos for SWISCo to become an employer of choice and the work that was being undertaken to support employees.

Resolved (unanimously):

That the Cabinet be recommended:

1. to improve promotion and communication of the green waste collection through:

- advertising at the remote collection sites;
  - including information on the Council Tax Bills together with the tonnage and cost benefits of this;
  - consider refer a friend scheme;
  - to raise awareness that residents can get a smaller bin if they need one; and
  - to consider moving to automatic renewal;
2. to review what action is being taken to ensure community engagement with friends group and local communities is being undertaken following the loss of the Community Engagement Officer;
  3. to request the Managing Director of SWISCo to prioritise working with friends groups to develop park plans, schedules, who is responsible for what and what plans there are e.g. investment for new equipment etc. to put in parks notice boards;
  4. to request the Director of Corporate Services to ensure that Committee reports include relevant reference to equalities and diversity relating to the report topic;
  5. to consider introducing additional key performance indicators for maintenance of grass verges etc. to demonstrate that they are meeting the requirements in the Business Plan regarding maintenance and enable this to be monitored;
  6. to provide evidence of best practice to demonstrate how we are enhancing our environment;
  7. that the emerging Business Plan and Commissioning Agreement review be presented to the Overview and Scrutiny Board prior to submission to Cabinet;
  8. that the revised Business Plan includes:
    - a. elements of risk to SWISCo;
    - b. their role as corporate parents;
    - c. being a foster friendly employer;
    - d. enhanced information climate change; and
    - e. include reference to any changes to service provision and its impact; and
  9. future reports on SWISCo to include current Business Plan, Risk Register and Capital Investment Plan to give wider background for the Board to ensure that SWISCo is delivering against the approved Business Plan.

(Note: the Managing Director of SWISCo, Matt Reeks, was unable to attend the meeting due to an injury and gave his apologies.)

**38. Councillor Call for Action - Review of Investigation into Removal of the Palm Trees at the Italian Gardens, Torquay**

In accordance with Standing Order D13, Councillor Steve Darling outlined his reasons for submitting a Councillor Call for Action regarding the removal of the palm trees at the Italian Gardens, Torquay.

The Board had to determine whether or not to request officers to prepare a full report on the matter.

Resolved (unanimously):

That the Overview and Scrutiny Board requests officers to prepare a full report on a Review of Investigation into the removal of the palm trees at the Italian Gardens, Torquay to be presented to the Board by no later than 13 March 2024.

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Chairman

**Meeting:** Overview & Scrutiny Board/Cabinet/Council    **Date:** 7 Feb/13 Feb/22 Feb 2024

**Wards affected:** All Wards

**Report Title:** Budget Monitoring 2023/24 – April to December 2023 Revenue and Capital Outturn Forecast.

**When does the decision need to be implemented?** N/A

**Cabinet Member Contact Details:** Alan Tyerman, Cabinet Member for Finance  
[alan.tyerman@torbay.gov.uk](mailto:alan.tyerman@torbay.gov.uk)

**Supporting Officer Contact Details:** Ian Rowswell, Deputy Director of Finance,  
[ian.rowswell@torbay.gov.uk](mailto:ian.rowswell@torbay.gov.uk),

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## 1. Purpose and Introduction

- 1.1. This report provides a high-level budget summary of the Council's revenue and capital position for the financial year 2023/24, reviewing budgets and considering year-end forecasts. These forecasts are based on the levels of spend and financial information at the end of quarter 3 (up to 31 December 2023).
- 1.2. The Council continues to face significant external pressures due to the wide-reaching implications of the current economic situation. The levels of cost inflation have reduced but are still impacting Council services in terms of direct cost pressures. We are also seeing an impact on the levels of income received, with many projections being below the levels budgeted. This pressure is resulting in a year end forecast for 2023/24 of **£0.8m overspend**, a £500k reduction on the forecast made at quarter 2.
- 1.3. The Capital Plan has now been reviewed, with an updated forward looking capital programme included within the 2024/25 budget papers, currently out for consultation. The Council is currently projecting spend of £55m on capital projects in 2023/24, compared with an original budget of £90m. The updated Capital Plan is now estimating a much reduced spend of £90m over the next 4-year capital programme (2023/24-2026/27). However, further projects will be moved from feasibility and development to fully approved projects throughout 2024/25 upon completion of robust Business Cases which will include drawing down various elements of circa £92m of external grant funding held.

## 2. Recommendations

### Recommendations for Overview and Scrutiny Board

- 2.1. That the Overview & Scrutiny Board notes the Council's forecasted revenue outturn position and mitigating action identified and make any comments and/or recommendations to the Cabinet.
- 2.2. That the Overview & Scrutiny Board notes the revised Capital Investment Plan (as detailed in Appendix 2) and make any comments and/or recommendations to the Cabinet.

### Recommendations for Cabinet/Council

- 2.3. That the Cabinet notes the forecasted revenue outturn position and recommends that Council approves:
  - 2.3.1. The revised Capital Investment Plan (as detailed in Appendix 2)

## 3. 2023/24 Budget Summary Position

- 3.1. Budget monitoring has identified a number of spending pressures and is now forecasting a total overspend at year end 2023/24 of £0.779m, broken down between Council Directorates as follows:

Service	Current Budget £m	Projected Outturn £m	Est. Outturn Variance Q3 £m	Est. Outturn Variance Q2 £m
Adult Services	51.559	52.589	1.030	1.055
Children's Services	50.338	51.329	0.991	1.382
Corporate and Executive Services	12.356	12.719	0.363	0.449
Finance	-12.444	-14.544	-2.100	-2.000
Investment Portfolio	-4.134	-4.134	0	0
Place	22.829	23.342	0.513	0.433
Public Health	10.446	10.446	0	0
<b>TOTAL</b>	<b>130.950</b>	<b>131.747</b>	<b>0.779</b>	<b>1.319</b>

- 3.2. Appendix 1 provides a summary of the agreed budget savings for 2023/24, showing whether these saving proposals have been achieved. Further details of the savings can be found within the published budget papers - [proposals-for-efficiencies-income-generation-](#)

[and-service-change.pdf \(torbay.gov.uk\)](#). Almost 70% of the total savings have already been achieved at this point in the year.

3.3. The projection has improved by £0.540m since the quarter 2 report, mainly resulting from plans to draw down £500k from central contingency in response to overspends on Childrens Services. Delivering a mitigated and reduced overspend by the end of the year will continue to require robust financial management and control from all services across the Council. Overspend recovery plans have been completed by each Director and will continue to be reviewed by the Senior Leadership Team.

3.4. The following areas will require particular focus over the rest of the financial year due to the level of overspends being forecast.

- Increasing costs associated with homelessness prevention activity and the provision of Temporary Accommodation.
- Cost pressures being experienced by Councils around Childrens Services Placements, including caring for Unaccompanied Asylum-Seeking Children (UASC).
- The Dedicated Schools Grant and in particular the Higher Needs Block, which is not currently shown within the table above. Spend continues to be monitored as part of the safety valve agreement in order to facilitate the future write off of accumulated deficits of over £12m.

#### 4. Service Budgets

4.1. The table below summarises the most material variances (over £100k) currently being forecast at the end of December 2023. Please note there are other smaller variances which are not highlighted within the table below.

Service	Current Budget £m	Projected Outturn £m	Q3 Outturn Variance £m	Projected variance at Q2 £m
Adults Service - Housing (Temporary Accommodation)	1.853	2.593	0.740	1.020
Adults Service – Homelessness prevention	0.145	0.400	0.255	0
Corporate and Exec Service - Legal services	1.336	1.752	0.416	0.510
Children’s Services – Care placements incl. Unaccompanied Asylum Seeking Children (UASC)	21.431	22.979	1.548	1.856
Childrens – Net staffing underspend across various CS teams/services.	19.573	18.744	(0.829)	(0.568)
Childrens Services – Recruitment and Retention	0.170	0.030	(0.140)	0
Childrens – Home to School Transport	3.818	4.130	0.312	0
Finance – Investments and borrowing	(1.927)	(3.927)	(2.000)	(2.000)
Place - Income below target across services ( <i>N.b figures relate to income only</i> )	(1.850)	1.456	0.394	0.644
Place – Income from Green Waste Service	(400)	0	0.400	0
Place - Waste disposal	4.453	3.983	-0.470	(0.470)

Place - Management fee to TCCT	0.320	0.490	0.170	0.170
			<b>0.796</b>	<b>1.319</b>

### **Adult Services (incl. Community and Customer Services)**

- 4.2. Within Adult Social Care the majority of spend is against a fixed price financial arrangement (contract) for the delivery of services provided by the Integrated Care Organisation (ICO). This agreement was uplifted by £5m in 2023/24, with a further £1.1m agreed for the following year. A new arrangement will need to be negotiated for 2025/26 onwards and activity is well underway with partners to identify actions that can reduce spend and enhance financial sustainability for the future.
- 4.3. The overspend currently forecast at Q3 for Adult services is mainly within our Housing Service and predominantly relates to increasing costs for both homelessness prevention (£0.255m) activity and the provision of Temporary Accommodation (£0.740m). There continues to be considerable demand in this service, fuelled by the cost of living, which is impacting significantly on clients both financially and emotionally. The main reasons for homelessness is the loss of private rented accommodation and breakdown in family relations.
- 4.4. Since 2020, there has been a 64% increase in people presenting to the local authority as homeless and a 66% increase in those being provided temporary accommodation. Compared to this point in time in 2022 there has been a 40% increase in presentations. Increasingly, families are approaching the service, and overall complexity is increasing.
- 4.5. This is combined with low availability of temporary options for individuals and family groups in need of temporary accommodation. As at 22 January 2024 there were 121 households living in Temporary Accommodation, of which 59 were families, with a significant amount of prevention activity underway to mitigate the risk of numbers significantly increasing.
- 4.6. Throughout 23/24 there has been a focus on directly purchasing and leasing property to reduce the costs associated with spot purchasing and increase the stability of accommodation options available to the Housing Options team. As at 22 January 2024, 31 properties have been purchased by Torbay Council, with 26 currently occupied by families. This will help to stabilise costs and allow more work to be done to prevent homelessness and support households to find more permanent housing. Work also continued on improving accommodation pathways and commissioning plans.

### **Corporate Services & Executive**

- 4.7. An overspend of £0.416m is currently being forecast within Legal Services. This is a result of the difficulties the service continues to face in recruiting permanent staff to meet levels of demand. This has meant the service have had to use more expensive agency staff to continue delivering legal support to services across the Council.
- 4.8. The council have struggled to compete with the salaries paid by other organisations – both within the private and public sector. The service is now applying additional market

factors in the hope this will make a difference to their ability to recruit and reduce their requirements of agency workers. However, it should be noted that recruitment of legal professionals in the public sector is a national issue.

4.9. Within Corporate and Executive Services, there are some underspends forecast across other teams and service areas, which are partially offsetting the overspend within Legal Services.

## **Children's Services**

4.10. Overall Children's Services is experiencing significant financial pressures due to extreme external forces outside of the control of the Council. An overspend of **£1.548m** is currently being forecast across care placements, despite the overall numbers of cared for children being lower than previous years. Significant shortages of suitable available placements are driving up costs within the market, with price increases since 21/22 of over 30% in residential and unregulated/unregistered placements. The legislation on unregulated placements changed in September 2022 and is resulting in further pressure on this budget into 2023/24.

4.11. This is exacerbated by the demand arising from the cases allocated to Torbay through the National and Regional allocation of Unaccompanied Asylum Seeking Children (UASC). Costs of placement and support are in excess of the Home Office Funding, with current financial pressures arising from UASCs estimated at £0.643m and significantly contributing to the overspend.

4.12. All of this means that despite the continued oversight, challenge and support from colleagues, external factors are now significantly influencing spend.

4.13. There is also cost pressure within the Home to School Transport budget as a result of increasing costs. This now totals **£0.312m** and relates to the existing routes. A thorough review of provision is planned for 2024/25, including a review of single occupancy taxis and the promotion of independent travel.

4.14. Offsetting some of these pressures are underspends in staffing budgets totalling **£0.829m** and underspends in recruitment and retention budgets **£0.140m**. Agency costs have been a significant financial pressure in recent years, but following successful recruitment and retention within the service, the total agency costs are forecast to be £2.3m this year compared with spend in 2021/22 of £4.9m. This demonstrates that Torbay Council has achieved significant improvements to influence spend where it can. We are now seeing significantly increased salary expectations within the agency market and stiff competition from other Councils that are offering increased hourly rates to stabilise their own workforces.

4.15. Outside of Local Authority funded activities, the schools' higher needs block in the Dedicated Schools Grant (DSG) remains under financial pressure from continual referrals for assessment for higher needs support for children.

4.16. The Council is part of the Education and Skills Funding Agency (ESFA) and Department for Education (DfE) Safety Valve programme, which supports councils in

achieving future financial sustainability in this area. If the council can deliver on its recovery plan and achieve a balanced higher needs budget, all of the historic DSG deficit will be written off, through additional funding by ESFA.

4.17. Torbay Council has already received £6.193m from the ESFA in response to its recovery plan, without which the DSG cumulative deficit was forecast to be £12.963m by the end of the financial year. For 2023/24 the DSG is forecasting an overspend of £1.262m at quarter 3, in line with the forecast deficit within the agreed safety valve plan of £1.263m. It is of importance to the Council's future budget position that the Council delivers its recovery plan.

## Finance

4.18. A **£2.0m** positive variance is being forecast, mainly as a result of increased interest rates, being applied on council investments. This means the Council is forecast to earn higher levels of interest on its current cash balances than was budgeted. Given the current low levels of spend on Capital projects, there is also a saving on interest payable by the Council as lower levels of spend activity means lower amounts borrowed, therefore reduced interest paid by the Council.

4.19. As part of setting the 2023/24 budget a few centrally held contingencies, mainly linked to pay and inflation risks, were held under finance and will be released to contribute towards known cost pressures.

4.20. A total of £0.920m has been transferred to service budgets to offset the additional costs arising from the 23/24 pay award, which was in excess of the 4% budgeted. Further contingency will be released before the year end to address specific budget pressures identified within 2023/24, mainly in relation the Childrens Services.

## Investment Portfolio

4.21. The Council's Investment Portfolio is forecast to contribute £4.134m towards Council activity – in line with budget. The investment property reserve is in place to cover lost rent and holding costs arising from empty units.

## Place

4.22. Within the Place directorate an overspend of **£0.513m** is currently forecast, mainly due to levels of income being lower than budgeted.

4.23. Planning have highlighted that projected application fee income is £0.150m below target and building regulation applications are similarly projecting a £0.050m shortfall. In addition, a shortfall of £0.060m is forecast on income from local land searches. All three of these elements reflect the challenging economic position of the country and the region.

- 4.24. An overspend of £0.100m is forecast for Torre Abbey despite admission numbers being higher than this time last year. The Paddington Exhibition and planned events/activities had some positive impact on admissions, but income from the Café continues to be below budget.
- 4.25. Income from the Garden Waste service is projected to be short of the amount budgeted, with numbers of subscribers being lower than the levels anticipated. The shortfall is forecast to be £400k, after a contribution from reserves of £150k – as part of supporting the scheme’s first year of operation.
- 4.26. The reduced Directorate levels of income are expected to be offset by an underspend within the waste budget. This is currently forecast at £470k due to disposal levels and associated costs being lower than forecast.
- 4.27. An overspend of £170k is being forecast in respect of the management fee paid to the Torbay Coast and Countryside Trust for management of land leased to the Trust by Torbay Council. This provides protection and enhancement of Torbay’s natural heritage for the benefit of the community and visitors. The additional fee is to provide short term support, whilst the Trust implements a number of measures to improve its financial sustainability.
- 4.28. Currently Parking Services is overall forecast to break even, with forecast losses in parking income offset by increases in enforcement income.

## **Public Health**

- 4.29. Overall Public Health is reporting a balanced position within its ring-fenced grant. A significant amount of spend relates to the provision of 0-19 services, which is expected to see increased spending pressures in future years, because of inflation.

## **5. Collection Fund**

- 5.1. Collection rates for 2023/24 are currently slightly below forecast levels, with the rising cost of living appearing to be having an impact. We continue to explore opportunities to increase our overall collection rates, whilst supporting residents and businesses. This will not have any impact on the 2023/24 financial year and the collection fund equalisation reserve is maintained to manage any impact in the following year.

## **6. Wholly owned companies**

- 6.1. SWISCo. has been managing the financial pressures associated with rising costs, particularly fuel and materials. However, due to movements in the international markets, the value of recycled material resale has dropped considerably and a shortfall of £175k is now being forecast for year end. SWISCo will continue to manage these pressures with the aim of returning to a breakeven position for 2023/24.
- 6.2. The pay award for 2023/24 resulted in a fixed £1,925 per full time employee, which has a disproportionate percentage impact on SWISCo given the average salary. As a result,

the Council has agreed an additional £0.391m of funding to meet the shortfall in the pay award.

6.3. TDA divisional Commercial P&L account to the end of November 2023 reported a year to date surplus of £0.399m (net of transition costs) against a budget of £0.203m. Within the TDA Group, TorVista reported a loss at the end of Sept 2023 of £0.290m against a budgeted loss of £0.222m. A specific budget code has been established to capture the transitional costs associated with managing the transfer of TDA to Torbay Council.

## **7. Statement of Accounts – 2020/21 and 2021/22**

7.1. The Council's Statement of Accounts for 2020/21 were only signed off by Grant Thornton in April 2023, despite their findings being presented to Audit Committee in December 2021.

7.2. Delay in auditing Council's Statement of Accounts by the Government's Statutory deadline has been highlighted previously and is a national issue, partly due to lack of capacity in the market. In the light of continuing problems nationally, the Government's statutory deadlines have been revised. Torbay Council's current position is that the audit of 21/22 accounts will be complete in the next few weeks, whilst the 22/23 and 23/24 accounts will both be audited by 30/09/24.

7.3. The protracted statement of accounts process has continued to put significant pressure on the finance team, who continue to work concurrently on multiple financial years.

## **8. Capital**

8.1. The Council is seeing extreme cost inflation in respect of its Capital projects. As a result, several schemes that are in progress are facing rising costs, which are at variance to initial business cases and forecasts. The viability of schemes supported by prudential borrowing are further impacted from the recent rises in borrowing rates.

8.2. The revenue outturn position for 2022/23 enabled £0.4m surplus to be transferred to a specific earmarked Capital Reserve, which will assist the Council in the re-prioritisation, and ultimate delivery, of the Capital Investment Programme. Revenue costs will be required to continue with design and feasibility work for specific schemes alongside bolstering capacity, and skills, in project delivery.

8.3. The Capital Investment Plan has now been reviewed and an updated forward looking capital programme included within the 2024/25 budget papers.

8.4. The Council is projecting spend of £55m on capital projects in 2023/24, compared with an original budget of £90m. This spend is part of a wider capital programme now estimated to totalling £90m over a 4-year period. The update Capital investment Programme providing further details of estimated costs is shown in Appendix 2 to this report.

8.5. The Capital Investment Plan is funded from capital receipts, capital grants and contributions, reserves and revenue budget contributions, and long-term borrowing to ensure a balanced budget over the life of the Plan.

8.6. The following new grant allocations have been announced since figures reported at Q2.

8.6.1. Additional allocation of £230,000 from DfT for 2023/24 from the Road Surfacing Fund for local highways maintenance. The same level of additional funding has also been announced for 2024/25.

8.6.2. Grant allocation of £950,000 from DLUHC, Brownfield Land Release Fund, following a successful bid for Crossways project.

## 9. Risks & Sensitivity

9.1. There are a number of financial risks facing the Council as shown below:

Risk	Impact	Mitigation
Financial sustainability and write off of the DSG Deficit	High	The Council has a recovery plan approved with the Department for Education's Safety Valve programme.
Adult Social Care funding is not sufficient to meet forecast costs.	High	The Director of Adult Social Care is developing a range of intervention activity and savings plans, in collaboration with Health Trust colleagues
High inflation rates have a major impact on both revenue and capital costs.	High	The 23/24 budget includes a higher than usual allowance for inflationary pressures, with contingencies also held for revenue and capital. A strategic review of the capital programme has commenced.
The "cost of living" economic impact on the Council's residents from higher mortgage, rent, fuel and utility costs is likely to impact on both demand for council services and may result in reduced income from council tax.	High	The Council will continue to mitigate where possible the impact on council services and support/signpost residents to appropriate support.
Collection Fund shortfall	High	Additional resources allocated to support the Revenues & Benefits team and a review of debt recovery will be undertaken. End to end processes are being reviewed.

Unable to recruit staff and need to use agency staff.	High	Work continues to identify solutions to these challenges which seem to be on a national scale.
Delivery of Children's Services cost reduction plan	High	Meetings continue to monitor the current rate of delivery against the identified actions from the Sufficiency Strategy.
Investment Property Income changes	High	The Investment Board will continue to review future leases and manage any potential break clause implications – maintaining appropriate balances within the Investment Reserve
Temporary Accommodation – increasing demand and cost pressures within the local housing market.	High	Work is underway on directly procuring and leasing property to increase the stability of accommodation options available to the Housing Options team. The Council has also increased its focus and resources on preventive work.

## 10. Appendices

- 10.1. Appendix 1 – Monitoring of published savings identified for 2023/24
- 10.2. Appendix 2 – Capital Plan Summary – Quarter 3 2023/24
- 10.3. Appendix 3 – Write offs over £5,000 - EXEMPT

<b>Monitoring of savings appearing on 23/24 published budget papers</b>				
Description of saving/efficiency	Directorate	£m	Achieved?	Comments
Harbour Health and Safety post to be funded by Harbours	Adults & Community	-0.050	Partial	Part achieved for £40k salary cost
CCTV - contribution from Fleet Walk	Adults & Community	-0.050	Yes	Achieved - budget adjusted
Home to School Transport	Childrens	-0.067	No	Pressures remain in H2S Transport
Reduction in agency costs	Childrens	-0.030	Yes	Savings achieved
Removal of Tranformation post	Corporate	-0.060	Yes	Achieved - budget adjusted
Digitalisation within electoral services	Corporate	-0.010	No	Not yet achieved
Use of MS365 - security	Corporate	-0.020	Yes	Savings from New E365 liccences - from Jan 24
Town Hall - savings from reduced usage	Place/Corporate Services	-0.100	Partial	Behind target on achieving savings
Transport post funded from capital	Place	-0.050	No	Issues flagged and listed as budget pressure
SWISCO efficiencies	Place	-0.250	Yes	Achieved - budget adjusted
Climate change savings offsetting borrowing costs	Place	-0.060	No	Issues flagged and listed as budget pressure
Increased recycling reducing costs of waste disposal	Place	-0.055	Yes	Achieved - budget adjusted
Increased income from Section 38 highways works	Place	-0.010	Yes	Savings achieved
Marketing costs to picked up externally	Place	-0.006	Yes	Budget adjusted and no issues
Increased income from events	Place	-0.033	No	Pressures emerging at Q1
Reduce net costs of Torbay Airshow - sponsorship	Place	-0.027	N/A	Additional budget found to reverse saving
TDA to fund borrowing costs of regeneration schemes	Finance	-0.200	N/A	Additional budget found to reverse saving
<b>Total published savings</b>		<b>-1.078</b>		
Savings achieved		-0.481	45%	
Savings n/a		-0.227	21%	
Savings partially achieved		-0.150	14%	
Savings not achieved		-0.220	20%	
		<b>-1.078</b>	<b>100%</b>	

CAPITAL INVESTMENT PROGRAMME - 2023/24 to 2026/27

Appendix 2

Project Details	Project Baseline Financials			Revised 4-year Plan				
	Estimated Scheme Cost £000	Spend in Prev Years £000	2023/24 Budget £000	2023/24 Revised Out-turn £000	2024/25 £000	2025/26 £000	2026/27 £000	Total for Plan Period £000
<b>Capital Programme Project</b>								
<b>Schools Capital Programme</b>								
Capital Repairs and Maintenance	on-going	on-going	300	1,010	300	250	200	1,760
Education Review Projects	on-going	on-going	1,461	111	670	670	660	2,111
High Needs Capital Provision	on-going	on-going	2,650	890	750	750		2,390
Devolved Formula Capital	315			314				314
Paignton Academy STEPS Relocation	1,250	0	0	150	1,100			1,250
Foster Homes Adaptations	300	51	100	1	83	83	82	249
Acorn Centre (Youth Investment Fund)	528	0	264	80	224	224		528

Awaiting confirmation of future year funding.
Assuming previous year funding is utilised up to 25/26
£1.5m of unallocated funding spread over 2x years.
2023/24 spend represents slippage from previous financial year
Business Case approved December 2023
Need confirmaiton that funding will still be utilised.
Need confirmation that scheme is still progressing.

Schools Closed Projects								
Mayfield Expansion	1,575	1,534	0	41				41
Paignton CS Academy Expansion	1,737	1,735	0	2				2
Roselands Primary - additional classroom	599	553	0	47				47
St Cuthbert Mayne Expansion	5,681	4,949		731				731
St Cuthbert Mayne Phase 2	1,000	34	750	966				966

Small amount of final fees to be spent up to March 2024
Retention payment and some fees still to process.
Large retention fee and some landscaping works still to be processed.
In addition to original expansion

Projects under Feasibility and Development								
Crossways, Paignton - Regeneration	36,983	2,264	5,000	1,200	250			1,450
Extra Care Housing (Torre Marine)	22,281	1,415	2,153	660	20			680
Edginswell Railway Station	24,400	613	5,000	2,297	0			2,297
Union Square Acquisition & Development (Town Deal)	70,000	3,957	7,043	846	312			1,158
Strand Land Assembly & (Debenhams) Demolition	13,600	161	2,500	50	20			70
Torquay Town Deal - Pavilion	13,000	57	1,300	423	77			500
Torquay Town Deal - Core Area Public Realm	850	60	598	60	20			80
Torbay Road Paignton (High Streets Funding)	1,500	77	426	100	33			133
Station Square (High Streets Funding)	2,540	202	2,027	211	42			253
Victoria Centre (Paignton) Phase 1 (FHSF)	652	25	602	351	276			627
Victoria Centre (Paignton) Phase 2 (FHSF)	3,862	55	3,312	1,360	325			1,685
Diversification (High Streets Funding)	0	0	1,300	0				0
Paignton Coastal Defence Scheme	17,515	238	150	211	15			226
Paignton Flood Defence (High Streets Funding)	571	0	485	37	534			571
Oldway Mansion - phase 1 of Master-Plan	0	0	0	0	250	250	250	750

Demolition spend. Development costs to Full Business Case.
Need to confirm funding to get to FBC due in March 24
Funding needed to get to Detailed Business Case.
Awaiting affordable Business Case from Regeneration partners
Awaiting affordable Business Case from Regeneration partners
Awaiting MDL settlement and subsequent Business Case
GPO Post Office Roundabout, Torquay. In procurement for contractor
Final scheme design pending
Final scheme design pending
Demolition Phase
Business Case pending
Project not progressing. Funding to be re-prioritised.
Significant funding gap. Seeking further grant.
Part of above scheme - funding from Future High Streets.
Council commitment to find £1m - funded through TM Reserve

Economic Development / Regeneration								
Edginswell Business Park Unit 1	6,927	2,200	5,724	4,727				4,727
Edginswell Enabling Works (LEP GBF)	5,281	2489	2,250	1,720				1,720
Harbour View Hotel Development	21,249	10,445	8,600	10,804				10,804
Torquay Strand Public Realm (Town Deal Funding)	4,485	587	1,814	800	1,119			1,919
Paignton Picture House (Future High Streets Funding)	1,285	918	367	367				367
Paignton Picture House (Community Dev Fund)	2,323	0	1,800	1,950	372			2,322
Lymington Rd Business Centre (LEP GBF/EGF)	5,925	1070	3,986	4,623	180			4,803
Small Projects - UK Shared Prosperity Fund	361	8	139	131	222			353

To be completed in 2023/24
To be completed in 2023/24. Approved increased spend.
Change request to transfer additional funding to complete.
To be completed in 2023/24
Grant passported from the Council.

Housing Development / Investment								
Temporary Accommodation	10,000	4,121	5,000	5,500				5,500
Disabled Facilities Grants	2,332	0	1,295	1,300	1,032	1,000	1,000	4,332
Enhancement of Development sites	329	137	65	132	60			192
Housing Rental Company - Loan	3,267	2,767	0	456				456
Community Led - Affordable Housing Loans	0	0	3,000	0				0
St Kilda's, Brixham - Affordable Housing	5,696	0	338	438	2,367	2,893		5,698

Acquisitions completed by March 24. Not using the full £10m
Future year funding awaiting confirmation
Expenditure required on sites to enable development and disposal.
Final drawdown on loan arrangement (Totnes Road).
No drawdown to date. Need to determine future need.
Full Business Case being considered by Council 22 February 24.

Environment / Climate Capital Investment								
SWISCO Loan - Vehicle & Equipment Replacement	2,800	1,230	2,338	0	1,570			1,570
SWISCO Loan - Buildings	1,200	0	1,000	0	1,200			1,200
Car Park Investment	850	54	500	796				796
Climate Change Initiatives	1,000	0	250	334	333	333		1,000
Green Waste Bins	929	201	619	200	264	264		728
Local Electric Vehicle Infrastructure	958	0		0	479	479		958
Changing Places Toilets	180	0	180	90				180
Solar Farm, Brokenbury (EGF)	2,275	192	1,620	288	43			331
Solar Farm, Nightingale Park (EGF)	4,150	385	2,914	484	62			546

Council original approval for £4m loans to be re-set in 2024/25
Council original approval for £4m loans to be re-set in 2024/25
Future investment linked to increased income.
£1m borrowing approved by Council. 50% to provide revenue return.
Anticipated completion by 31.3.24
Revised Business case to be considered in February 2024
Revised Business case to be considered in February 2024

Transport Capital Investment								
Transport Highways Structural Maintenance	4,361		2,038	2,771	2,050	2,050	2,050	8,921
Transport Integrated Transport Schemes	2,241		1,147	1,170	1,071	1,071	1,071	4,383
Transport - Torquay Gateway Road Improvements	3,485	3,450	20	21	14			35
Transport - Western Corridor	12,294	11,682	250	199	200	211		610
Shiphay Lane (Active Travel Fund)	227			0	226			226
Babbacombe Beach Road	469	439	31	15	15			30

Awaiting confirmation of future year funding/investment
Awaiting confirmation of future year funding/investment
Specific grant funding received in 23/24 - to be spent in 24/25

Coastal Defence / Flood alleviation								
Flood Alleviation - Cockington	328	301		27				27
Flood Alleviation - Monksbridge	412	86	295	326				326
Torquay Flood Alleviation	50	4	20	46				46
Paignton Flood Alleviation	60	10	40	50				50
Brixham Flood Alleviation	45	10	25	35				35

Sports, Leisure and Culture								
Clennon Valley Sport Improvements	70	32		22				22
Haldon & Princess Pier	95	7	50	88				88
Princess Pier - Structural repair	1,665	818	60	0	62			62
Torquay Town Dock - Infrastructure Improvements	1,200	741	211	460				460
Harbour Patrol Boat	72	0		72				72
Torre Valley North Sports Facilities	422			46				46
Park Tennis Renovation	504			504				504
Armada Park Refurbishment	91			10				10
Torre Abbey Gatehouse/SW Wing	1,290	54	707	813	422			1,235
Torre Abbey SE Wing/Courtyard/Tower	539	20	297	344	175			519
Torre Abbey Renovation - Phase 3	0	0	208	32				32
RICC Improvements - Backlog Repairs	1,250	935	0	280	35			315

Purchase of Harbour Patrol Boat. Funded through Harbour reserves.  
Funded through grant, contributions, reserves and S106s.  
Renovation of St Marys, Oldway and Abbey Park Tennis Courts.  
Refurbish changing rooms. Grant, contributions and S106 funding.  
Small Council contribution to attract external grant funding.

Closed Projects								
Preston (North) - Development of former WCs		47	717	0				0
The Pines (TCCT)	75			75				75
Maidencombe Beach CP (TCCT)	45			45				45
EPIC Equipment (funded from LEP)	230			230				230
Claylands Redevelopment	11,150	10,748		20	20			40

Funding (to be moved to Projects Pending)								
Adult Social Care Grant	2,777	0	895	80				80
Affordable Housing	1,598	243	529	0				0
Torquay Towns Fund (General)	158	0	52	0				0
General Capital Contingency	342	0	632	342				342
Capital Contingency	0	0	600	0				0

Feasibility costs incurred
Funding to be transferred to pending
Funding to be transferred to pending
Contingency used in 23/24 to fund Harbour View shortfall

<b>Full Capital Investment Plan Totals</b>	<b>352,087</b>	<b>74,411</b>	<b>90,044</b>	<b>55,412</b>	<b>18,984</b>	<b>10,528</b>	<b>5,313</b>	<b>90,237</b>
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#### CAPITAL INVESTMENT PROGRAMME - FUNDING SOURCE

	2023/24 Budget £000	2023/24 Revised Out-turn £000	2024/25 £000	2025/26 £000	2026/27 £000	Total for Plan Period £000
Unsupported Borrowing	41,346	29,807	4,450	3,490		37,747
Grants	45,616	22,501	13,252	6,513	4,981	47,247
Contributions	570	1,012	700	21		1,733
Revenue	1,035	1,050	483	320	250	2,103
Reserves	385	497	14	162	82	755
Capital Receipts	1,092	545	85	22		652
<b>Total</b>	<b>90,044</b>	<b>55,412</b>	<b>18,984</b>	<b>10,528</b>	<b>5,313</b>	<b>90,237</b>

Document is Restricted

## **Review of Events, Culture and Tourism – Report of the Overview and Scrutiny Board – Draft V1**

### **Report to Cabinet on 19 March 2024**

#### **Background**

1. The Review of Events, Culture and Tourism Task and Finish Group met on 20 November, 6 December 2023 and 11 January 2024 to consider:
  - how we use our cultural assets (e.g. English Riviera Global UNESCO Geopark, Agatha Christie and Torre Abbey etc.) to help them become self-sustaining in the future and ensure they were being maximised for our tourism and culture offer;
  - how the Council uses data to inform decision in relation to use of cultural assets;
  - a review of the Torbay Council English Riviera (Outdoor) Events Strategy 2021 – 2027 (Events Strategy), incorporating delivery to date, and to determine if the objectives had been delivered and were still relevant and to make recommendations;
  - whether the events that the Council supports were contributing towards the delivery of the English Riviera Destination Management Plan (DMP) 2022 – 2030;
  - what the criteria was for enabling, delivering and funding events on Council owned land;
  - how the success of events was measured and evaluated;
  - whether the Council and Destination Management Group have sufficient resources and capacity to deliver the Events Strategy and DMP and what opportunities were there to utilise resources from outside the Council;
  - what data did the Council use and how that data informed decision making in relation to events;

- how the Council engaged and worked with community and voluntary organisations on events;
  - what opportunities there were to facilitate benefits to our care experienced young people and foster families in respect of events; and
  - how to ensure that local business benefits from tourism and culture and how they could help with promotion.
2. The Review Panel comprised Councillors Brook, Carter, Mandy Darling, Fellows, Johns, Law, Maddison, Nicolaou, Jackie Thomas and Twelves (and was Chaired by Councillor Twelves) with support from Carolyn Custerson, Chief Executive of the English Riviera Business Improvement District (ERBID).

(Note: Councillor Brook declared a non-pecuniary interest as a Member of the English Riviera Business Improvement District Company Board and Torbay Business Forum.)

3. The background papers, including the detailed Scope for the Review and the recordings of the meetings can be found at <https://www.torbay.gov.uk/DemocraticServices/ieListMeetings.aspx?CommitteeId=1946>

4. Key evidence considered by the Panel included:

- Review of Events, Culture and Tourism Scope and Timeline;
- Torbay Council English Riviera (Outdoor) Events Strategy 2021 – 2027 <https://www.torbay.gov.uk/DemocraticServices/documents/s112183/Events%20Strategy%20Appendix.pdf#:~:text=This%20strategy%20has%20a%20focus%20on%20outdoor%20events,Council%20and%20by%20the%20Torbay%20Council%20Events%20Team;>
- English Riviera Destination Management Plan 2022 – 2030 [https://www.torbay.gov.uk/council/policies/economic-regeneration/dmp/;](https://www.torbay.gov.uk/council/policies/economic-regeneration/dmp/)
- Torbay Heritage Strategy 2021-2026 - [Torbay Heritage Strategy - Torbay Council;](#)
- Enjoy, talk, be, do, a Cultural Strategy for Torbay and its communities 2014-2024 - [Cultural Strategy-document.pdf \(torbay.gov.uk\);](#)
- Heritage Places Fund - [£200million funding for Heritage Places will boost local economies and pride in place | The National Lottery Heritage Fund](#) and [Torbay to be included in £200m commitment](#)

[launched by The National Lottery Heritage Fund to help areas across the UK thrive - Torbay Council;](#)

- Torbay Story – [Torbay Story - Home;](#)
- English Riviera Naturally Inspiring - [https://www.englishriviera.co.uk/?utm\\_source=Torbay%20Council&utm\\_medium=web;](https://www.englishriviera.co.uk/?utm_source=Torbay%20Council&utm_medium=web;)
- Torbay Council webpages - [https://www.torbay.gov.uk/leisure-sports-and-community/;](https://www.torbay.gov.uk/leisure-sports-and-community/)
- English Riviera Global UNESCO Geopark webpages - [English Riviera Global Geopark - Homepage \(englishrivierageopark.org.uk\);](http://EnglishRivieraGlobalGeopark.org.uk)
- Torre Abbey webpages - [Torre Abbey \(torre-abbey.org.uk\);](http://TorreAbbey.org.uk)
- Presentation on Strategic Cultural Partnership and Torbay's Cultural and Heritage Strategies;
- Cultural assets currently within the remit of the Culture and Events team;
- Torre Abbey 2021-2025 business plan reviewed Jan 2022 (Exempt);
- Torre Abbey 3 year budgets - for 2021/22 2022/23 2023/24 (Exempt);
- Torre Abbey restoration budget (Exempt);
- Monthly Key Performance Indicator report Torre Abbey (Exempt);
- Marketing spend Torre Abbey 23-24 (Exempt);
- Geopark marketing strategy 23-24 (Exempt);
- Geopark 3 year budgets - for 2021/22 2022/23 2023/24 (Exempt);
- Detail on how critical funding is for UNESCO Geopark, why it is critical and what is the gap. (Exempt);
- Overview marketing plan 2023-24 – a plan of all marketing activity within the department (Exempt);
- Social media data – data from various social media campaigns across the department including Geopark and Torre Abbey (Exempt);
- Geopark Annual Report 2022;
- Budget Digest Culture and Events 2019-20;
- Budget Digest Culture and Events 2020-21;
- Budget Digest Culture and Events 2021-22;
- Budget Digest Culture and Events 2022-23;
- Budget Digest Culture and Events 2023-24;
- Budget Digest overall council budget 2023-24;
- Culture and Events Structure May 2023 (Exempt);
- ECH Budget PB271123 – events, culture and heritage fund budget for the past 3 years inclusive (Exempt);
- Events Strategy suggested updates;

- Events strategy part 2 Evidence base and supporting information;
- Events strategy action plan (Exempt);
- Responses to key lines of enquiry events and Destination Management Plan;
- Events in Torbay a Guide for Organisations;
- Event Notification Procedures and Public Safety Advisory Group; and
- Responses to key lines of enquiry Communication and Engagement.

## 5. Key Findings

### Cultural Assets and Strategy

5.1 How did the Council use our cultural assets (e.g. English Riviera Global UNESCO Geopark, Agatha Christie and Torre Abbey Etc.) to help them become self sustaining in the future and ensure they were being maximised for our tourism and culture offer?

<b>Cultural Asset</b>	<b>How managed</b>	<b>Narrative</b>
<b>Torre Abbey, Torquay</b>	Directly managed by Torbay Council.	The Council have a team that directly manages Torre Abbey for the benefit of the community and visitors to the area. Their focus is on protecting the building and collection care, as well as running a programme to reduce the cost burden on the Council. Also includes, seasonal café offer, walled garden and palm house.
<b>Princess Theatre, Torquay</b>	Managed on behalf of the Council by Ambassador Theatre Group (ATG) who are a national and highly rated theatre management and show production organisation. ATG have a long lease.	The Council pays a fee for ATG to run a varied and popular programme of entertainment at Princess Theatre.
<b>Palace Theatre</b>	Leased by Jazz Hands CIC a local community interest company.	Jazz Hands run the theatre and are one of two candidate National Portfolio Organisations in Paignton

<b>Cultural Asset</b>	<b>How managed</b>	<b>Narrative</b>
<b>Torquay Museum</b>	The museum is owned by the museum's charitable trust.	Torbay Council provides a grant each year towards the cost of running the museum.
<b>Brixham Heritage Museum</b>	Brixham Museum building is owned by Torbay Council and leased by the museum charity at no cost. Brixham Heritage Museum was a registered charity.	The Council provides a grant each year towards the running of the museum.
<b>Torbay Leisure Centre</b>	The Leisure Centre is owned by Torbay Council. Lex Leisure who are linked to Parkwood Leisure run the centre on a long lease.	There is no additional cost to the Council as part of the lease.
<b>Riviera International Centre</b>	The Centre is owned by Torbay Council. Lex Leisure, a subsidiary of Parkwood Leisure, run the centre on a long lease.	There is no direct cost to the Council. However, the Council is responsible for repairs under the lease.
<b>Swim Torquay, Plainmoor Torquay</b>	This is a community facility with charitable status. The land is owned by the Council and the organisation built the pool on it. Therefore the centre is now a legal entity leased from Torbay Council.	The Council paid a grant towards running costs in 2023 to support rising energy costs and it is hoped this would continue in 2024/2025.
<b>Admiral Pool, Brixham</b>	This is a community facility with charitable status. The land is owned by the Council and the organisation built the pool on it. Therefore the centre is now a legal entity leased from Torbay Council.	The Council paid a grant towards running costs in 2023 to support rising energy costs and it is hoped this would continue in 2024/2025.

5.2 All other Council owned properties such as Oldway Mansion, Torquay Pavilion etc. were not within scope of the Events and Culture Team's objectives or this review. However, as heritage assets returning them to active use will be supportive of related culture, events and heritage work.

5.3 Torre Abbey is therefore the only cultural asset which the Council's Events and Culture Team has full control over. Torre Abbey is an ancient scheduled monument and Grade I listed building together with the Spanish Barn which

has benefited from Government Funding to help restore sections of the building. The Council is working with The National Lottery Heritage Fund (as UK lead funder for heritage) and Historic England (as the statutory body) to try to secure additional funding to restore the Spanish Barn which would assist in helping Torre Abbey to become more financially stable as it would open up more opportunities to lease the space for different events all year round.

- 5.4 Members noted that it is not currently financially viable to run the café all year round and it had to be moved to the Spanish Barn earlier in the year to enable the current phase of restoration to take place. This resulted in a limited offer due to lack of suitable facilities at the Spanish Barn in respect of a dedicated kitchen, toilets and problems with holes in the roof caused by golf balls going through from the neighbouring pitch and putt course. This will be kept under review and longer-term options developed as part of a bid for additional funding to restore and improve the Spanish Barn as well as looking at how best to maximise the whole site which sits on 18.4 acres of land including Torre Abbey Meadows. Members noted the urgency of resolving this issue as part of providing a sustainable future for Torre Abbey.
- 5.5 It was noted that the Friends of Torre Abbey Group had disbanded but that a Development Foundation Trust is being established to sit alongside Torre Abbey as an independent organisation to help Torre Abbey to be more sustainable in the future. There was a 1196 Club as part of the commercial element of the business which raises money through subscriptions and sales. There was also a new Commercial Manager in post who is looking to increase the number of people getting an annual membership as well as more public events and fairs, and increasing commercial activity such as hiring the Spanish Barn for weddings etc. Whilst there was a recognition that Torre Abbey needed to become more financially secure, the community benefit and social benefit of our cultural and heritage assets was also acknowledged.
- 5.6 Members noted that the ongoing budgets for Torre Abbey did not reflect what was included within the Cultural Strategy or Torre Abbey Initial Business Plan and there was a need for this to be more closely monitored in the future.
- 5.7 Based on the evidence provided and financial information it was unlikely that Torre Abbey would be completely financially independent, but both Members and Torre Abbey staff had a desire to work towards financial stability in the future. Members acknowledged the hard work of the Team working with the Council's partners to try to secure one of Torbay's most loved heritage assets.

- 5.8 The UNESCO Global Geopark was supported by a Geopark Lead Officer who worked with colleagues within the Events and Culture Team and Torbay Culture together with the ERBID to ensure that it was promoted and marketed to a national audience. The ERBID also helped promote other cultural and heritage facilities in Torbay.
- 5.9 Members discussed the exempt documents which related to Torre Abbey and UNESCO Global Geopark budgets, marketing and performance and their deliberations informed the overall content of this report and their recommendations. As part of considering the budgets Members acknowledged the partnership working and match funding for several key events by the ERBID and welcomed the continued relationship between the Council and ERBID as a crucial partner in helping deliver successful events across Torbay. Members noted that the £100,000 match funding from the Council to mirror the funding that the ERBID Company puts towards the delivery of the Events Strategy and Destination Management Plan was coming to an end soon and needed to be renegotiated.
- 5.10 It was also noted that the Cabinet's draft Revenue Budget proposals for 2024/2025 included £1m investment in events over the next four years (£250,000 per year) and careful consideration would need to be given to prioritise that funding, having regards to other budget pressures and the evidence contained within this report.
- 5.11 **What was the direction of travel for the revised Cultural Strategy?**
- 5.12 Members noted the opportunity to use culture to improve the quality of life and make Torbay a better place for residents and visitors, helping people learn about their world e.g. UNESCO Global Geopark, working with communities and making improvements in hospitals with projects such as those in the mental health wards. The Cultural Strategy 'Enjoy, Talk, Do, Be – a cultural strategy for Torbay and its communities' was approved in 2014 and runs until 2024 with aims for participation, strategic alignment, natural and built environment and strongly references the potential for Torbay's UNESCO destination.
- 5.13 Torbay Culture, Torbay's Culture Board, was created in 2015 to own the culture strategy and raise awareness of the Cultural Strategy. Supported through TDA initially and working with Torbay Council, Arts Council England and local cultural practitioners it has informed or led development of activities including The Great Places Scheme (2017-2020) was a cultural programme of

lots of activities to develop audiences for the UNESCO Global Geopark and local stories and places (activity and research).

5.14 Members noted what had been delivered to date through the Cultural Strategy:

- **Keep growing – cultural and creative development for our home:** Agatha Christie artwork, Agatha Christie Festival sustainability; Cultural Development Fund (CDF): supporting programme in Paignton, digital skills programme (South Devon College), CDF National Network visit to Torbay (Sep 2022); Hospital Rooms delivery in mental health wards (Nov 2022).
- **Living well – better future for young people:** Supporting interventions (via external opportunities - Literature Works, AC Festival, CDF programme). Evidence and impact – culture health and wellbeing reports; University of Exeter research into creative industries.
- **Encouraging a renaissance for historic places and spaces:** CDF capital investment; Museum Estate and Development Fund Arts Council (MEND) and other funding Torre Abbey; Torbay local heritage grant scheme; Heritage Places.
- **Environment – celebrating our UNESCO Global Geopark:** Active participation in UNESCO revalidation, advocacy and funding advice, supporting programming, participation in the UK National Commission audience development resilience work (underway now).
- **Cultural tourism:** ‘Writers on the Riviera’ and ‘Speed Up and Slow Down’ delivered, continued participation in Destination Management Group (DMG), prioritisation of Agatha Christie as authentic unique selling point (USP).
- **Heritage interpretation framework**, endorsed by National Lottery Heritage Fund 2021.
- **Investment in a new local heritage grant scheme** (Heritage Fund) Bespoke scheme, to be used as inspiration for scheme in Northern Ireland 2023.
- **Capital investment alignment** with national funding – ‘Lightplay’ Royal Terrace Gardens 2021 natural and science heritage as inspiration; CDF2 Paignton Picture House (Department for Culture Media and Sport (DCMS) and Arts Council England (ACE)) alignment with others (Department for Levelling Up, Housing and Communities (DLUHC)); Torre Abbey (MEND etc) focus for investment and transformation, etc 2022.

- **New conservation role** – Principal Historic Environment Officer role (appointed 2023).

5.15 Members acknowledged the following important opportunities for Torbay to maximise:

- **Torbay was among the first ‘Heritage Places’ - closer and deeper collaboration with the Heritage Fund** 10 year funded partnership (£200m across 10 years, one of 20 places), aligned with Fund’s national strategy to 2033, and local opportunities for Torbay.
- **‘Levelling Up Partnership’** DLUHC Levelling Up Partnerships (LUP) (£400m, 10 years, one of 20 places) was a parallel opportunity. Heritage Fund 10 Year partnership to be cross referenced and complementary.
- **‘Levelling Up for Culture Place’** (LUCP) DCMS & ACE listing (2022) resulted in £3.5m DCMS investment = CDF2 - Paignton Picture House and MEND - Torre Abbey.
- **Potential future Arts Council investment in Torbay ACE** investment in Torbay for 2023- 26 was low (comparators N Devon, Torridge, Somerset as other LUCPs; neighbours Exeter, Plymouth, Cornwall). Dialogue ongoing with ACE to address this.
- **‘Torbay Story’** toolkit to tell our USPs, authenticity, relevance and inspirational. Align this and LUP with a Theory of Change model the Heritage Fund want to agree by Dec 2023.

5.16 **How and what data was used to inform decision making in relation to cultural assets?**

The Council used customer data for Torre Abbey to shape and adjust its offer accordingly. There were signed up members (1196 Club) as well as visitors for exhibition, events and general visitors to the Abbey. There was a strong schools programme where the Council encouraged school visits and used the data about those that had and had not visited in line with the national curriculum (Torre Abbey – Key Performance Indicator data, visitor number data and income data). The Spirit of Place document is used as their guiding principle, and there is a project board for the current restoration project. Various decisions were made by the Torre Abbey Leadership Team in relation to the running of Torre Abbey and any key developments, and decisions were taken in consultation with the Service Manager, Divisional Director, Director, Senior Leadership Team and/or Cabinet in line with usual Council protocol.

## Events

### 5.17 **Were the objectives of the Torbay Council English Riviera (Outdoor) Events Strategy 2021 – 2027 still relevant?**

Members acknowledged that the Events Strategy was still relevant but noted the submitted document 'Refresh or Update' which set out a number of proposed minor amendments to ensure that it reflected current practice and had been produced following a partner review meeting with the ERBID. Members noted the elements of the Events Strategy that had been delivered to date as set out in the submitted document 'Responses to Key Lines of Enquiry – Events'. Members acknowledged the impact on the capacity of the Team to deliver events due to sickness and maternity leave, however, they had processed approximately 150 applications for events over the past year. Members also recognised the collaborative working with the ERBID to deliver both the Events Strategy and Destination Management Plan.

### 5.18 **Did the events that the Council supported contribute towards the delivery of the English Riviera Destination Management Plan (DMP) 2022 – 2030?**

Members agreed that the two documents complemented each other and supported mutual delivery but noted that the Events Strategy was written prior to the Destination Management Plan and some of the elements may have been worded slightly differently if the documents had been written the other way around.

### 5.19 **What were the criteria for, enabling, delivering and funding events on Council owned land and did this prohibit events that the Council may wish to support taking place and how had this been used to determine which events should go ahead?**

The criteria for enabling events to take place on Council land was broad and included considerations as to positive impact on the local economy; whether the event would be good for the local community - of value and interest that would benefit the community; good for raising awareness and quality events that would show the area at its best. The criteria were currently not at all prohibitive. This was set out in the 'Torbay Council Events in Torbay – A Guide for Organisers'. This was mainly via a process on our Events Application System APPLY4 that links in with the area's Public Safety Advisory Council (PSAG). PSAG's remit was to review all significant event

applications in the area from a services co-ordination and health and safety perspective. It was made up of the blue light services including the Coastguard, the Harbour Authority, Torbay Council's Events Team, the Council's Corporate Health and Safety Manager, Licensing Officers, Highways Authority etc. Most events were given the go-ahead unless there were clear issues in the applicant's event management plans, previous poor delivery or operational practices were unacceptable.

- 5.20 Following the development of the Events Strategy, a Monitoring Panel was organised to track the elements of the Events Strategy that needed to be reviewed, and also to review event applications for the seed funding element of the Strategy and any new events. The Panel was made up of the Cabinet Member and representatives from across the community, with the Council's Senior Events Officer and was called Torbay Events Advisory Panel, however, Members noted that this Group had not met since May 2023 due to staffing issues but that some monitoring was carried out by the ERBID and also through the English Riviera Events Collective and Members questioned if the Collective could take over the role of the Panel. The Panel put together an Events Charter which event organisers sign up to when they go through the application process. See <https://www.torbay.gov.uk/leisure-sports-and-community/hold-an-event/english-riviera-events-charter/>.
- 5.21 Other than that described above there was no specific criteria for headline and feature events to link them with the Events Strategy and Destination Management Plan and Members felt that this was required to ensure that we were prioritising the right events and encouraging more offer in the shoulder seasons (i.e. early spring, autumn and winter months).
- 5.22 Members felt that some of the information on the website and documents relating to events such as the 'Events in Torbay A Guide for Organisers' and the 'Apply to Hold an Event' system, was not easy to read or follow and suggested that this should be reviewed to make it more accessible.
- 5.23 **How was the success of events measured and evaluated and did this make a difference to future events?**

For 2023 English Riviera Airshow, an economic and social impact study was undertaken. This cost £9,500+vat but the data was worthwhile collecting and showed a net return of £15.56 for every £1 invested by the Council, amongst a lot of other good data about visitors etc.

- 5.24 For larger events, success was measured through a mixture of the benefit to the community - economically and socially; whether there were any issues, i.e. if the event didn't supply the requisite number of stewards/security as promised; didn't follow their Event Management Plan and there were resultant noise issues or issues such as a proliferation of drug use at the event. For medium events a feedback report was requested which would then be reviewed with PSAG and if significant issues with the running of it were identified either the event would not be able to happen again or could happen again (last chance) with a strong change in oversight. It was noted that feedback was not normally obtained for community events so as not to make this an additional burden for the volunteers and dissuade them from organising these events, which were of great benefit to the local community.
- 5.25 An important factor was feedback from the hospitality sector and accommodation sector. If there was a perceived limited benefit to the local economy the Council may advise an event organiser to consider investing in an economic (and/or social) impact study, or other mechanism to prove the value of the event locally (for example, this was done for Electric Bay).
- 5.26 Another success factor was income to the Council. The Events Team had a high income target each year and need events that were prepared to pay a suitable fee and a reinstatement bond each time (excluding community events). Members were advised that the amount of bond for the fair and circus was being reviewed to see if it could be increased to a suitable level to cover the cost of any reinstatement of ground following their use. This year £20,000 of bonds were available and SWISCo (who were responsible for carrying out the reinstatement work) had suggested that reinstatement work was part of the £45,000 fee for making the whole area of the greens good. It was noted that discussions were being held with colleagues to discuss overall funding for maintenance of Paignton Green and Torre Abbey Meadows and which budgets this should be funded from.
- 5.27 Members discussed issues around capacity and increased maintenance costs for our two key events spaces, namely Paignton Green and Torre Abbey and suggested the merit of a feasibility study into the costs of making the areas fit for purpose and considering the possibility of making a permanent show ground space to enable greater use of these assets for events all year round. It was acknowledged that the cost of the feasibility study, resources required and any implementation would need to be considered alongside other budget pressures for the Events Team, but that this was an opportunity to generate more income and improve the offer to our residents and visitors.

5.28 The Events Strategy contained the below six actions which Members had considered and monitored as part of the review but felt that if there had been sufficient resources and oversight of these actions there would have been less of a need for a review.

1. **Shift the strategic focus** to achieving more with the limited resources available and seek out funding and match funding opportunities.
2. **Development of an Events Charter** to set clear expectations from organisers and to cement the actions that are important to local communities in event planning.
3. **Build capacity** in the sector to make the English Riviera a centre of events' excellence across the spectrum of event types and sizes.
4. **Investment in events** in order to develop key sites that meet the needs of quality event organisers that manage events which will have a UK wide audience.
5. **Support the development of local event organisers, producers and promoters** to create high-impact events and enable job skills and job creation.
6. **Support Marketing promotions with partner groups and organisations** to ensure the events offer of the English Riviera is promoted far and wide as a welcoming and vibrant destination, which has a diverse range of appeal.

5.29 **Did the Council and Destination Management Group have sufficient capacity to deliver the Events Strategy and DMP and who else could help deliver this?**

Members determined that there were probably not currently sufficient resources to deliver the Events Strategy and Destination Management Plan based on current staffing levels within the Events Team; other responsibilities held by some members of the Team; some temporary funding being used to fund posts and delivery of the English Riviera Airshow coming back in-house. The submitted document suggested that retaining a Senior Events Officer post March, and creating another full-time Events Officer post, and another part-time Events Officer post, should be sufficient to undertake the current commitments of the Events Strategy and the DMP. Without any uplift in staffing support, including administrative support, Councillors would need to make a difficult decision about what events and services to keep and what to drop.

5.30 Members also acknowledged the need for additional capital funding to support future repairs and maintenance of our cultural assets as well as the need to continue to seek further external funding opportunities as well as delivering the projects which had already secured such funding.

**5.31 How and what data was used to inform decision making in relation to events?**

Information was gathered from event organisers, through the Apply4 system. This largely related to health and safety issues in relation to the Purple Guide for event management. The safety of people attending events came before all other considerations. This was also what was discussed as part of PSAG deliberations. This information formed part of the weekly discussion that the Events Team had with the Culture and Events Service Manager which provided the opportunity to discuss any issues and ask pertinent questions. The Service Manager would then take the discussion (mainly about new events) to the Divisional Director or Members if required.

5.32 New events and events with potential issues would be discussed at PSAG and event organisers were often invited in to present their plans. For all events, but mainly those that were commercial events, the Council would be interested in numbers attending, income to the Council, and ahead of a second year, attendee demographics. The Council was also interested in impact locally on the hospitality and accommodation sectors.

**5.33 How were businesses able to engage with and influence tourism and culture activities?**

The Council mainly made contact with local businesses in relation to events via the ERBID, who then issued update information to their funding stakeholder organisations.

5.34 For Council run events such as the English Riviera Airshow the Council produced updates that ERBID shared with its funding stakeholder organisations. The Council also tried to make contact with the local businesses to inform them as to what is happening during the planning stage and also a few weeks ahead of the event, to inform about road closures etc. The Events Team also attended meetings run by the Licencing Team for licensed businesses in the area to inform them of these plans. This year's Airshow was being looked at in a different way, where the Council was looking to the community for more involvement and support for the event, so they had

attended a business breakfast to discuss financial support and inform businesses of our plans.

- 5.35 The Events Team also issue regular press/media releases with details about how individuals and organisations/businesses can get involved. They maintain a website of the same information see - <https://www.torbay.gov.uk/event-list/?q=other>.
- 5.36 For the Bay of Lights Illumination Trail, the Events Team took a similar approach to the Airshow – they visited all the businesses enroute and discussed the plans and also issued media releases and worked with ERBID to promote the event to businesses.
- 5.37 Businesses could help provide links to what was happening on their websites. They could engage with and provide feedback either via ERBID or to the Events Team directly or have a key role by investing in the Council and other's events.
- 5.38 **How did the Council engage and work with community and voluntary sector organisations on events?**

Via press/media releases and social media communications with direct engagement where appropriate and also through the ERBID.

- 5.39 **How can the Council maximise opportunities to benefit our care experienced young people and foster families in respect of events?**

The Council already supports our care experienced young people and foster families by giving them tickets to Council run events and putting on events with them e.g. King's Coronation and Queen's Jubilee. The Council supports with enabling an annual event with the fair, providing free tickets for the circus, vouchers for the international market during the summer, enabling the big wheel operator to offer free and discounted entry etc. The Events Team also work in partnership with Children's Services who help to fund tickets to events such as the circus, free and discounted entry to Torre Abbey and to see Father Christmas at Torre Abbey etc. Members also noted the terrific support from local businesses and organisations such as the Dartmouth Railway's Train of Lights, Splashdown and Princess Theatre.

## 6. Conclusion

- 6.1 The Panel reflected and debated all the information provided to them, both verbal and written. Members acknowledged the significant achievements of the Council and its partners in securing external investment for Torbay's cultural and heritage assets in recent years. The panel also recognised the importance of ensuring that there is sufficient capacity to deliver the Council and the Torbay Story's ambitions as a place and the projects for which funding had been identified. This would require additional investment by the Council as well as working more creatively with its partners, the community, voluntary and business sector to engage more and encourage more collaboration and celebration of the unique selling points around what Torbay has to offer, particularly in relation to the UNESCO Global Geopark. Encouraging businesses to work together to help promote each other and offer incentives for people to visit multiple cultural and heritage sites was also identified as important.
- 6.2 Members commended the work carried out by the Events Team over the past year despite reduced resources due to staff absence and other pressures within the Team, but felt that if Torbay was serious about being a premier destination, investment needed to be made to maintain appropriate staffing levels in order to deliver key events such as the English Riviera Airshow and invest in future infrastructure and explore new ways of working with partners, the community, voluntary and business sector to sell the Torbay Story and encourage more people to visit and stay in Torbay all year round. They also acknowledged the significant pressures on the Team bringing the Airshow back inhouse and that any additional work/investment requested as part of this review would need to be prioritised by the Director of Pride in Place.
- 6.3 Members thanked all those who had taken part in the review, particularly Carolyn Custerson for her expert advice and the members of the public who contributed towards the discussions.
- 6.4 The Panel formed the following recommendation to the Cabinet, which were considered by the Priorities and Resources Review Panel as part of their review of the Cabinet's budget proposals for 2024/2025 and approved by the Overview and Scrutiny Board on 7 February 2024. On being put to the vote, the motion was declared carried unanimously.

## 7. Recommendations

### 7.1 That the Cabinet be recommended:

1. that the Director of Pride in Place be requested to review how local businesses can become more involved to help promote cultural activity within Torbay, to ensure that local businesses feel connected into UNESCO Global Geopark Status and cultural assets;
2. that the Director of Pride in Place be requested to review the activities around education and raising the profile of the UNESCO Global Geopark, exploring how to maximise opportunities for education, particularly encouraging national geologists to use the Geopark and Devonian Period etc. and to include increased signage and boards with a particular focus on attracting more out of season opportunities;
3. That the Director of Pride in Place be requested to review the resource and capacity of the Events and Culture Team, including administrative support, and to explore how the independent, voluntary, community and business sectors could contribute to ensure that there is sufficient capacity and resources to deliver:
  - a. the Cultural and Heritage Strategies;
  - b. projects where the Council has received significant external funding;
  - c. future ambitions of the Council and its key partners, including the continuation of the £100,000 match funding from the Council to mirror the funding that the English Riviera Business Improvement District Company puts towards the delivery of the Events Strategy and Destination Management Plan;
4. that the Director of Pride in Place and Chief Executive of the English Riviera Business Improvement District be requested to review the communication around how to advertise events taking place in Torbay through <https://www.englishriviera.co.uk/whats-on>, including signposting approved event's organisers to the website, to ensure greater take up especially of smaller events;
5. that the Director of Pride in Place reviews whether the Torre Abbey pitch and putt contract remains the most appropriate use of the space to meet the Council's cultural and heritage objectives, especially in light

of the ongoing damage and annual repair costs to the roof of the Spanish Barn; how the risk of damage to the Spanish Barn can be reduced in future and explore alternative uses for the area, maximising the archaeological history of the site;

6. that the annual Business Plan for Torre Abbey be reviewed and presented annually to the Overview and Scrutiny Board together with details of performance against the previous plan;
7. that the Director of Pride in Place be requested to ask the Destination Management Group to explore options for working more collaboratively with attractions across Torbay to establish how they can work together to encourage and incentivise visitors to multiple attractions to help increase footfall;
8. that Members support the proposed revisions set out in the Events Strategy Suggested Updates document which ensures that it is in line with the Destination Management Plan and consider that the Events Strategy remains relevant;
9. that a report on implementation against the Events Strategy and Destination Management Plan is submitted to the Overview and Scrutiny Board to review and monitor performance on an annual basis or earlier if budgetary or capacity concerns are identified, to ensure that delivery of the Strategy and Plan remain achievable;
10. that the Director of Pride in Place be requested to develop and implement a criteria and application form for headline and feature events based on the Events Strategy and Destination Management Plan to enable the Council to assess applications against that criteria, particularly during the shoulder seasons to ensure that the events taking place on Council land are compliant with the Events Strategy;
11. that the Director of Pride in Place and the Events Team be requested to assess the effectiveness of the Torbay Events Advisory Panel and whether working with the ERBID and English Riviera Events Collective as an alternative would release capacity within the Team;
12. that the Director of Pride in Place be requested to explore the costs of a feasibility study to assess whether Torbay's meadows and green spaces could be utilised as show grounds; and

13. that the Director of Pride in Place be requested to review the information on the Council's website and documents relating to events such as the 'Events in Torbay A Guide for Organisers' and 'Apply to Hold an Event' to make them more accessible.