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PUBLIC

To: Members of Cabinet

Wednesday, 29 November 2023

Dear Councillor,

Please attend a meeting of the **Cabinet** to be held at **2.00 pm** on **Thursday, 7 December 2023** in Committee Room 1, County Hall, Matlock, the agenda for which is set out below.

Yours faithfully

A handwritten signature in black ink that reads 'Helen E. Barrington'.

Helen Barrington

Director of Legal and Democratic Services

A G E N D A

1. To receive apologies for absence
2. To receive declarations of interest (if any)
3. To consider Minority Group Leader questions (if any)

Minority Group Leaders in attendance at the meeting are able to ask a question on a report on the agenda. Any questions should be provided in writing by 12 noon at least 2 working days before the meeting.

4. To approve, as a correct record, the non-exempt minutes of the meeting held on 23 November 2023. (Pages 1 - 6)
5. Treasury Management Mid-Year Report 2023-24 (Pages 7 - 36)

6. Capital Budget Monitoring and Forecast as at Quarter 2 2023-2024 (Pages 37 - 52)
7. Community Safety service – Budget virement (Pages 53 - 58)
8. Opportunities for the Potential Relocation of Clay Cross and Staveley Libraries - Public Consultation Results (Pages 59 - 102)
9. Markham Vale Progress (Pages 103 - 118)
10. Green Towns Consultation Outcome (Pages 119 - 124)
11. Charging Policy for local residents in receipt of Adult Social Care Support in the community (Pages 125 - 346)
12. Exclusion of the Public

To move “That under Regulation 4 (2)(b) of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012, the public be excluded from the meeting for the following items of business on the grounds that in view of the nature of the items of business, that if members of the public were present, exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A to the Local Government Act 1972 would be disclosed to them.”

PART II - EXEMPT ITEMS

13. Provision of Insurance Services Tender (Pages 347 - 360)
14. Markham Vale Delegated Decisions (Pages 361 - 368)

PUBLIC

MINUTES of a meeting of **CABINET** held on Thursday, 23 November 2023 at Committee Room 1, County Hall, Matlock.

PRESENT

Councillor B Lewis (in the Chair)

Councillors S Spencer, C Cupit, A Dale, C Hart, N Hoy, T King and J Patten.

Apologies for absence were submitted for Councillor C Renwick.

Officers present: Helen Barrington (Director of Legal and Democratic Services), Alec Dubberley (Head of Democratic and Registration Services), Linda Elba-Porter (Service Director), James Gracey, Chris Henning (Executive Director - Place), Ellie Houlston (Director Of Public Health), Mark Kenyon (Director of Finance and ICT) and Joe O'Sullivan (Executive Director - Corporate Services and Transformation).

160/23 TO RECEIVE DECLARATIONS OF INTEREST (IF ANY)

None received.

161/23 TO CONSIDER MINORITY GROUP LEADER QUESTIONS (IF ANY)

None received.

162/23 TO APPROVE, AS A CORRECT RECORD, THE NON-EXEMPT MINUTES OF THE MEETING HELD ON 19 OCTOBER 2023.

RESOLVED:

To approve, as a correct record, the minutes of the meeting held on 19 October 2023.

163/23 PERFORMANCE AND BUDGET MONITORING Q2 (JULY-SEPT 23)

Councillor S Spencer introduced a report, which had been circulated in advance of the meeting, that provided an update of Council Plan performance and the Revenue Budget/forecast outturn for 2023-24, as of 30 September 2023 (Quarter 2).

RESOLVED to:

- 1) Note and agree the update of Council Plan performance and the Revenue Budget position/forecast outturn for 2023-24 as at 30

September 2023 (Quarter 2);

- 2) Note the position on General and Earmarked Reserves;
- 3) Note significant actions are required and will be undertaken across the Council to reduce the significant revenue overspend detailed in this report. Cabinet will be kept informed on the implementation and progress of these actions; and
- 4) Approve the changed approach for consultation on specific budget options.

164/23 EAST MIDLANDS COMBINED COUNTY AUTHORITY FINANCIAL ARRANGEMENTS

Councillor S Spencer introduced a report, which had been circulated in advance of the meeting, seeking to approve the receipt of £0.250m of mayoral capacity funding allocated to the Constituent Councils which will form part of the East Midlands Combined County Authority for the current financial year.

RESOLVED to:

- 1) Approve the receipt of the £0.250m Mayoral Capacity funding awarded to the constituent councils on behalf of the East Midlands Combined County Authority (EMCCA) and note that a further payment will be made later in 2023-24, subject to the ongoing viability of the deal and once the local Assurance Framework has been approved by The Department for Levelling Up, Housing and Communities;
- 2) Delegate authority to the Director of Finance and ICT to accept any future grants allocated to the Constituent Councils which form part of the EMCCA for the financial year 2023/2024 as part of the Devolution Deal.
- 3) Note that the Council is the accountable body for this funding and will be responsible for administering the grants.

165/23 DIGITAL STRATEGY, ICT STRATEGY, TARGET OPERATING MODEL AND IMPLEMENTATION PLAN FOR DERBYSHIRE COUNTY COUNCIL'S FUTURE ICT SERVICE

Councillor S Spencer introduced a report, which had been circulated in advance of the meeting, updating Members on the progress of the Digital Strategy, ICT Strategy, Target Operating Model and

Implementation Plan for Derbyshire County Council's future ICT Service, as well as proposals to make changes to the leadership structure.

RESOLVED to note:

- 1) The progress of the Digital Strategy, ICT Strategy, Target Operating Model (TOM) and Implementation Plan for Derbyshire County Council's future ICT Service;
- 2) That further development of the Strategies, TOM and Implementation Plan, an analysis of the council's infrastructure to determine the upgrade costs and likely timeframe to move services from an 'on-premise' to a 'cloud' provision is ongoing, and will be the subject of further reporting;
- 3) The analysis to date recommends a change to the future ICT Service's leadership structure, and the establishment of a Chief Technology Officer, Director level leadership role, with overall responsibility for the council's technical infrastructure, ICT service and the full costs of delivering them;
- 4) The recruitment of a Chief Technology Officer, Director level role, and supporting Assistant Director and Heads of Service level capacity and capability, will allow the council to replace the stabilisation leadership currently provided by SOCITM Advisory; and
- 5) The implications to the change in ICT Service's leadership structure will be the subject of a recommendation to the Head of Paid Service, so that approval can be sought from Council for the Chief Technology Officer, Director level salary, and recruitment to the structure can begin.

166/23 BRACKENFIELD SEND SCHOOL PROPOSED CHANGE OF AGE RANGE

Councillor A Dale introduced a report, which had been circulated in advance of the meeting, seeking approval to commence a formal statutory proposal to increase the school's age limit and to undertake a statutory consultation on the proposal.

RESOLVED to:

- 1) Note the pre-publication consultation carried out by the school; and

- 2) Approve the publishing of a statutory proposal to extend the age range of Brackenfield SEND school and for a statutory consultation on the proposal to be undertaken.

167/23 EXPANSION PROJECT FOR THE CURZON CE (AIDED) PRIMARY SCHOOL

Councillor A Dale introduced a report, which had been circulated in advance of the meeting, seeking approval to commence the expansion of The Curzon CE (Aided) Primary School to meet the demands of housing growth.

RESOLVED to approve:

- 1) Allocation of £1,249,427 of Section 106 funding and £25,573 of Basic Need funding 2015-16 towards the proposed expansion of The Curzon CE (Aided) Primary School; and
- 2) Publication of the statutory notice for the consultation of the expansion of The Curzon CE (Aided) Primary School.

168/23 ACCEPTANCE OF LOW EMISSION VEHICLE INFRASTRUCTURE (LEVI) FUNDING FROM THE DEPARTMENT FOR TRANSPORT

Councillor T King introduced a report, which had been circulated in advance of the meeting, proposing the acceptance of Department for Transport funding for the provision of Low Emission Vehicle infrastructure for Derbyshire.

RESOLVED to:

- 1) Note and accept the Urgent Officer Decision taken by the Executive Director - Place on 16 March 2023 to accept a capability fund grant allocation of £127,440 from the Department of Transport;
- 2) Approve the acceptance of additional capability funding allocation grant of £580,560 from the Department of Transport for the period 2023 to end of March 2025;
- 3) Approve the acceptance of £6.604m of capital grant – made up of £2.5m for street lighting LEVI charge point work packages and £4.104m for ‘destination’ charge point work packages, subject to successful completion of project delivery plans through consultation with the Department of Transport, and to add both work packages to the Council’s capital programme;

- 4) Approve the delegation of the awarding of charge point contracts to the Executive Director - Place, in consultation with Cabinet Member for Infrastructure and Environment, subject to a competitive procurement exercise being satisfactorily completed;
- 5) Approve the Council's involvement in the East Midlands Low Emission Vehicle Infrastructure Consortium and to work with the Consortium to develop the destination charge point project delivery plan; and
- 6) Approve the finalisation of both charge point work packages be delegated to the Executive Director – Place, in consultation with the Cabinet Member for Infrastructure and Environment.

169/23 FORWARD PLAN

Councillor S Spencer introduced a report, which had been circulated in advance of the meeting, that presented the Executive's Forward Plan for the period 1 December – 31 March 2024.

Councillor Spencer updated Members that the County Hall options report was being deferred from December to January's meeting to allow an all member briefing to take place early in the new year.

RESOLVED:

To note the contents of the Forward Plan.

170/23 EXCLUSION OF THE PUBLIC

RESOLVED:

That under Regulation 4(2)(b) of the Local Authorities (Executive Arrangements) (Meetings and Access to Information) (England) Regulations 2012, the public are excluded from the meeting for the remaining business on the grounds that in view of the nature of the items of business, that if members of the public were present, exempt information as defined in Paragraph 3 of Part 1 of Schedule 12A of the Local Government Act 1972 would be disclosed to them.

171/23 TO APPROVE, AS A CORRECT RECORD, THE EXEMPT MINUTES OF THE MEETING HELD ON 19 OCTOBER 2023.

RESOLVED:

To approve, as a correct record, the exempt minutes of the meeting held on 19 October 2023.

The meeting finished at 2.31 pm



FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

CABINET

7 December 2023

Report of the Director of Finance & ICT

Treasury Management Mid-Year Report 2023-24
(Corporate Services and Budget)

1. Divisions Affected

1.1 County-wide.

2. Key Decision

2.1 This is not a Key Decision.

3. Purpose

3.1 To provide Cabinet with details of Treasury Management activities during the first half of 2023-24 and to indicate the Council's compliance with the prudential indicators set by Council at its meeting of 15 February 2023, in accordance with the Chartered Institute of Public Finance and Accountancy's "*Treasury Management in the Public Services: Code of Practice 2021 Edition*" (the CIPFA Code).

4. Information and Analysis

Introduction

4.1 The Council's Treasury Management Strategy for 2023-24 was approved at the Council Meeting of 15 February 2023 as part of the

Capital Programme Approvals, Treasury Management and Capital Strategies for 2023-24 Report. The Council has borrowed and invested substantial sums of money and is therefore exposed to financial risks, including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk remains central to the Council's Treasury Management Strategy.

- 4.2 Treasury risk management at the Council is conducted within the framework of the CIPFA Code, which requires the Council to approve a treasury management strategy before the start of each financial year and a semi-annual and annual treasury outturn report. This report fulfils the Council's legal obligation under the Local Government Act 2003 to have regard to the CIPFA Code by producing a semi-annual treasury report. This report includes the new requirement in the 2021 Code, mandatory from 1st April 2023, of quarterly reporting of the treasury management prudential indicators

External Context

Economic background

- 4.3 UK inflation remained stubbornly high over much of the period April to September 2023, compared to the US and Eurozone, maintaining expectations of further increases in the Bank of England (BoE) official Bank Rate. However, inflation data published in the latter part of the period was lower than expected, causing financial markets to reassess and adjust their forecasts of the peak in the Bank Rate, from 6% to 5.5%. Soon after, in September 2023, the BoE Monetary Policy Committee (MPC) voted to maintain the Bank Rate at 5.25%. It was 4.25% in March 2023, before the start of the period. By the end of the period, financial markets had further adjusted their expectations of the peak in the Bank Rate, from 5.5% to 5.25%, meaning that they expected that the peak in the rate had been reached.
- 4.4 Economic growth in the UK remained relatively weak over the period. In Q1 2023-24, the economy expanded by 0.1% and in Q2 2023-24 it expanded by 0.2%. The housing market stalled, with the monetary tightening cycle starting to cause recessionary, or at the very least stagnating, economic conditions.
- 4.5 In data published in October 2023, the June to August 2023 UK unemployment rate increased by 0.2% to 4.2%. Pay growth was 7.8% for regular pay and 1.1% in real terms, after adjusting for inflation.

- 4.6 UK inflation continued to fall from its peak, as the annual headline Consumer Price Index (CPI) measure of inflation decreased to 6.7% in September 2023. However, the rate of decrease was not as great as expected, due to increased fuel prices. CPI inflation was 10.1% in March 2023, before the start of the period.
- 4.7 The lagged effect of monetary policy together with staggered fixed term mortgage maturities over the next 12-24 months means that the full impact from Bank Rate rises is still yet to be felt by UK households.
- 4.8 The US Federal Reserve increased its policy rates to a range of 5.25%-5.5% over the period, from 4.75%-5% in March 2023. Having fallen throughout 2023, annual US inflation started to increase again in Q2 2023-24, rising from 3% in June 2023 to 3.7% in August 2023, due to increasing oil prices. US Gross Domestic Product (GDP) growth was relatively strong, registering 2% in Q1 2023-24 and 2.1% in Q2 2023-24.
- 4.9 The European Central Bank (ECB) increased its key deposit and main refinancing interest rates to 4% and 4.5%, respectively, in September 2023. At March 2023, its deposit facility rate was 3% and its main refinancing rate was 3.5%. The ECB hinted that these levels may represent the peak in rates but also emphasised that rates would stay high for as long as required to bring inflation down to target. Although Eurozone inflation continued to decline steadily, inflation did not decline as quickly as expected. Eurozone annual headline CPI fell to 5.2% in August 2023. Eurozone GDP growth remained weak, with recent data showing the region expanded by only 0.1% in Q1 2023-24.

Financial markets

- 4.10 Financial market sentiment and bond yields remained volatile during Q1 and Q2 2023-24, with bond yields generally decreasing as there were signs that inflation, while still high, was stabilising and that interest rates had peaked. Gilt yields fell towards the end of the period. The 5-year UK benchmark gilt yield increased from 3.30% to peak at 4.91% in July 2023, before trending downwards to 4.29%, whilst the 10-year gilt yield increased from 3.43% to 4.75% in August 2023, before reducing to 4.45%, and the 20-year yield increased from 3.75% to 4.97% in August 2023 and then fell back to 4.84% by the end of Q2 2023-24. The Sterling Overnight Rate (SONIA) averaged 4.73% over the period.

Credit background

- 4.11 The Council's Treasury Management Advisor completed a review of its credit advice on unsecured deposits at UK and non-UK banks, following concerns of a wider financial crisis after the collapse of Silicon Valley Bank purchase of Credit Suisse by UBS, as well as other well-publicised banking sector issues. The reduced maximum duration limit for all banks on its recommended counterparty list was maintained at 35 days throughout the period.
- 4.12 Following the issue of a Section 114 notice, in September 2023 the Council's Treasury Management Advisor advised against undertaking new lending to Birmingham City Council, and later in the month cut its recommended duration on Warrington Borough Council to a maximum of 100 days.

Local Context

- 4.13 On 31 March 2023, the Council had net borrowing of £111.358m arising from its revenue and capital income and expenditure. The underlying need to borrow for capital purposes is measured by the Capital Financing Requirement (CFR), while usable reserves and working capital are the underlying resources available for investment. These factors are summarised in Table 1 below.

Table 1: Balance Sheet Summary

	31.3.23 Actual £m	31.3.24 Forecast £m
General Fund CFR	594.275	709.387
Less: Other debt liabilities*	-55.178	-49.675
Borrowing CFR	539.097	659.712
Less: Usable reserves	-376.838	- 189.058
Less: Working capital	-50.901	-50.901
Net borrowing requirement	111.358	419.753
Borrowing CFR is comprised:		
External borrowing	490.079	400.174
Internal borrowing	49.018	259.538
	539.097	659.712

* Finance leases, PFI liabilities and transferred debt that form part of the Council's total debt.

- 4.14 The Council pursued its strategy of keeping borrowing and investments below their underlying levels, sometimes known as internal borrowing, in order to reduce risk and keep interest costs low. The treasury management position at 30 September 2023 and the change during the year are shown in Table 2 below.

Table 2: Treasury Management Summary

	31.3.23					30.9.23	30.9.23
	Balance	New	Repaid	Change in Market Value	Movement	Balance	Rate
	£m	£m	£m	£m	£m	£m	%
Long-term borrowing	265.579	10.000	-11.405	0	-1.405	264.174	4.40
Short-term borrowing	224.500	202.000	-152.000	0	50.000	274.500	4.54
Total borrowing	490.079	212.000	-163.405	0.000	48.595	538.674	4.47
Long-term strategic pooled funds	64.631	0	0	-1.257	-1.257	63.374	4.89
Long-term investments*	10.000	0	0	0	0	10.000	0.80
Short-term investments	238.004	142.553	-168.004	0	-25.451	212.463	3.40
Cash and cash equivalents	66.086	290.847	-246.364	0	44.483	110.569	5.19
Total investments	378.721	433.400	-414.368	-1.257	17.775	396.496	4.02
Net borrowing	111.358	-221.400	250.963	1.257	30.820	142.178	

*Excludes Non-Treasury Loans

Borrowing Activity

- 4.15 CIPFA's 2021 Prudential Code is clear that local authorities must not borrow to invest primarily for financial return and that it is not prudent for local authorities to make any investment or spending decision that will increase the capital financing requirement, and so may lead to new borrowing, unless directly and primarily related to the functions of the Authority. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield unless these loans are for refinancing purposes.
- 4.16 The Council held £63.374m in externally managed pooled funds at 30 September 2023, which are now classed as commercial investments. These were purchased prior to the change in the CIPFA Prudential Code when strategic pooled funds were re-categorised as commercial investments. Before undertaking further additional borrowing the Council will review the options for exiting these investments. Further detail on the Council's pooled funds is given at paragraphs 4.39 to 4.48.
- 4.17 At 30 September 2023, the Council held £538.674m of loans, an increase of £48.595m from 31 March 2023, as part of its strategy for funding previous and current years' capital programmes. The year-end external borrowing position and the year-on-year change is shown in Table 3.1 below.

Table 3.1: External Borrowing Position

	31.3.23				30.9.23	30.9.23	30.9.23
	Balance	New	Repaid	Movement	Balance	Interest Rate	WAM*
	£m	£m	£m	£m	£m	%	Years
Public Works Loan Board	250.579	0	-6.405	-6.405	244.174	4.37	16
Banks (LOBO)	5.000	0	-5.000	-5.000	0	n/a	n/a
Banks (fixed-term)	10.000	0	0	0	10.000	4.69	20
Local authorities (long-term)	0	10.000	0	10.000	10.000	4.85	2
Local authorities (short-term)	224.500	202.000	-152.000	50.000	274.500	4.54	1
External Borrowing	490.079	212.000	-163.405	48.595	538.674	4.55	15

*WAM – Weighted Average Maturity

- 4.18 As outlined in the Council's Treasury Management Strategy for 2023-24, the Council's chief objective when borrowing was to strike an appropriately low risk balance between securing lower interest costs and achieving cost certainty over the period for which funds are required, with flexibility to renegotiate loans should the Council's long-term plans change being a secondary objective.
- 4.19 The Council's borrowing strategy continued to address the key issue of affordability without compromising the longer-term stability of the debt portfolio and, where practicable, to maintain borrowing and investments below their underlying levels, sometimes known as internal borrowing. The Council continued to use internal resources or borrowed rolling temporary/short-term loans in first half of 2023-24. The net movement in temporary/short-term loans is shown in Table 3.1 above.
- 4.20 The Council has an increasing CFR because of its capital programme. The estimated borrowing requirement is determined by a Liability Benchmark, which also takes into account usable reserves and working capital.
- 4.21 There was a substantial rise in the cost of both short- and long-term borrowing over the last 18 months. The BoE official Bank Rate increased by 1% over the period, from 4.25% at the beginning of April 2023 to 5.25% at the end of September 2023. By the end of the period the BoE official Bank Rate was 2% higher than at the end of September 2022.
- 4.22 UK gilt yields were volatile over the period, following signs that UK growth had been more resilient, that inflation had not decreased as quickly as expected, and that the BoE saw persistently higher rates through 2023-24 as key to dampening domestic demand. Gilt yields, and consequently Public Works Loan Board (PWLB) borrowing rates, rose and broadly remained at elevated levels. On 30 September 2023, the PWLB certainty rates for maturity loans were 5.26% for 10-year loans, 5.64% for 20-year loans and 5.43% for 50-year loans. Their equivalents on 31 March 2023 were 4.33%, 4.70% and 4.41% respectively.
- 4.23 The Council's Treasury Management Advisors expect that interest rates will fall in the medium-term, therefore it is the Council's strategy to finance the Council's borrowing, be it at higher rates, in the short-term, before 'locking in' to longer-term borrowing once rates are more favourable.

- 4.24 The Council's short-term borrowing costs have continued to increase with the rise in the BoE official Bank Rate and short-dated market rates. The average rate on the Council's short-term loans at 30 September 2023 of £274.500m was 4.54%, compared with £149.500m at 0.53% 12 months ago.
- 4.25 The Council's borrowing decisions are not predicated on any one outcome for interest rates and a balanced portfolio of short- and long-term borrowing was maintained. Table 3.2 below show the Council's external long-dated loans borrowed from other local authorities.

Table 3.2: External Long-dated Loans Borrowed From Other Local Authorities

	Amount £m	Rate %	Period (Years)
Oxfordshire	5.000	4.90	2
Oxfordshire	5.000	4.80	3
Total borrowing	10.000	4.85	3

- 4.26 Forward starting loans: To enable certainty of cost to be achieved without suffering a cost of carry in the intervening period, the Council arranged £35.000m of forward starting loans with details of which are shown in Table 3.3 below.

Table 3.3: External Forward Starting Loans

	Amount £m	Rate %	Loan Period (Years)	Forward Period (Months)
Warwickshire	10.000	5.60	1	8
West Midlands Combined	10.000	5.70	1	8
West Midlands Combined	10.000	5.85	1	8
Crawley	5.000	5.57	1	10
Total borrowing	35.000	5.70	1	9

- 4.27 There remains a strong argument for diversifying funding sources, particularly if rates can be achieved on alternatives which are below gilt yields + 0.80%. The Council will evaluate and pursue these lower cost solutions and opportunities with its Treasury Management Advisor.

- 4.28 The UK Infrastructure Bank is one alternative source of funding which offers funding at gilt yields + 0.40% (0.40% below the PWLB certainty rate) and the possibility of more flexible funding structures than the PWLB. Funding from UKIB is generally only available for certain types of projects that meet its criteria of green energy, transport, digital, water and waste. The minimum loan size is £5.000m.
- 4.29 At the start of the period, the Council continued to hold a £5.000m LOBO (Lender's Option Borrower's Option) loan, where the lender, Dexia, had the option to propose an increase in the interest rate at set dates (known as a call option), following which the Council had the option whether to either accept the new rate or to repay the loan at no additional cost.
- 4.30 As market interest rates increased, there was an increased probability of the call option on the LOBO being exercised by the lender. On 16 August 2023, Dexia exercised its call option on the LOBO. The Council declined the new interest rate and repaid the loan. The details are shown in Table 3.4 below.

Table 3.4: LOBO Repayment

LOBO Lender	Amount £m	Interest Rate %	Final Maturity	New Interest Rate Proposed %	Council Action Taken
Dexia	5.000	4.50	16/8/2039	5.14	Repaid at nominal amount from cash resources
Total	5.000	4.50		5.14	

Other Debt Activity

- 4.31 There were no repayments of prior years' Private Finance Initiative/ finance leases/transferred debt liabilities in the six month period to 30 September 2023. Total debt other than borrowing stood at £55.178m on 30 September 2023, taking total debt to £593.852m.

Treasury Investment Activity

- 4.32 The CIPFA Treasury Management Code now defines treasury management investments as those investments which arise from the Council's cash flows or treasury risk management activity that ultimately represents balances that need to be invested until the cash is required for use in the course of business.
- 4.33 The Council holds a significant but reducing level of invested funds, representing income received in advance of expenditure plus balances and reserves held. During the first half of 2023-24, the Council's investment balance ranged between £385.141m and £494.740m because of timing differences between income and expenditure. The investment position is shown in Table 4 below.

Table 4: Investment Position (Treasury Investments)

	31.3.23					30.9.23	30.9.23	30.9.23
	Balance	New	Repaid	Change in Market Value	Movement	Balance	Income Return	WAM*
	£m	£m	£m	£m	£m	£m	%	days
Banks and building societies (unsecured)	85.590	7.983	-53.003	0	-45.020	40.570	5.02	1
Money Market Funds	0	100.000	-70.000	0	30.000	30.000	5.35	1
Government (UK & Supra-national)	0	77.917	-38.365	0	39.552	39.552	4.68	45
Local Authorities	218.500	247.500	-253.000	0	-5.500	213.000	3.38	107
Registered Social Providers	10.000	0	0	0	0.000	10.000	1.65	155
Pooled Funds –Strategic Bond Funds	4.539	0	0	-0.014	-0.014	4.525	4.16	N/A
Pooled Funds –Equity Income Funds	14.608	0	0	-0.458	-0.458	14.150	6.09	N/A
Pooled Funds –Property Funds	23.013	0	0	-0.300	-0.300	22.713	4.66	N/A
Pooled Funds – Multi Asset Income Funds	22.471	0	0	-0.485	-0.485	21.986	4.51	N/A
Total Investments	378.721	433.400	-414.368	-1.257	17.775	396.496	4.02	79

*WAM - Weighted average maturity applies to the first five categories above.

- 4.34 Both the CIPFA Code and Government guidance require the Council to invest its funds prudently, and to have regard to the security and liquidity of its treasury investments before seeking the optimum rate of return, or yield. The Council's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income.
- 4.35 The Council expects to be a long-term borrower and new treasury investments are therefore primarily made to manage day-to-day cash flows using short-term low risk investment instruments. The existing portfolio of strategic pooled funds will be maintained to diversify risk into different asset classes and boost investment income.
- 4.36 The BoE official Bank Rate increased by 1.00%, from 4.25% at the beginning of April 2023 to 5.25% by the end of September 2023. Short-dated cash investment rates increased as a result, with 12-month rates rising to nearly 6%. The rates on Debt Management Account Deposit Facility (DMADF) deposits also increased, ranging between 5.17% and 5.29%, with overnight Money Market Rates at 5.35%, by the end of September 2023.
- 4.37 Given the risk of short-term unsecured bank investments, the Council maintained its diversification into higher yielding asset classes as shown in Table 4 above. The Council previously identified £70.000m of funds available for longer-term investment and invested in pooled property/bond/equity/multi-asset funds. In the first half of 2023-24, the Council has maintained this sum invested, although is considering some divestment at the right time.
- 4.38 The progression of credit risk and return metrics are shown in benchmarking extracts the Council's Treasury Management Adviser (Arlingclose) in Table 5 below.

Table 5: Investment Benchmarking – Treasury Investments Managed In-house

	Credit Score	Credit Rating	Bail-in Exposure	Weighted Average Maturity (days)	Total Return %
Derbyshire - 30.09.2023	4.67	A+	25%	79	3.20
Similar Local Authorities	4.38	AA-	36%	2080	3.59
All Local Authorities	4.47	AA-	50%	13	3.65

Externally Managed Pooled Funds


- 4.39 At 30 September 2023, the value of the Council's investments in externally managed pooled strategic bond, equity, multi-asset and property funds amounted to £63.374m (£70.000m nominal value). The value of these investments at 31 March 2023 was £64.631m and at 31 March 2022 was £71.765m. The Council holds these funds with the aim of receiving regular revenue income and because over the long-term their prices are relatively stable, although short-term prices are less stable. Holding these pooled funds allows the Council to diversify into asset classes other than cash without the need to own and manage the underlying investments.
- 4.40 The change in the Council's funds' capital values and % Income Return during Q1 and Q2 of 2023-24 is shown in Table 4. These funds are currently forecast to generate an average total return of £1.822m in 2023-24, comprising a £3.094m income return (shown as a % Income Return for each pooled fund in Table 4), which is being used to support services in 2023-24, and a £1.272m unrealised capital loss, which is the movement in the market value of these investments from the start to the end of the year. Income returns are currently at 4.89% against a budget of 4.42%. Paragraphs 4.41 to 4.44 consider the market movements which impacted on the value of these externally managed pooled strategic bond, equity, property and multi-asset funds and resulted in an unrealised capital loss for the first half of 2023-24. Paragraphs 4.45 to 4.48 consider the Council's holding in these pooled funds and highlights that pooled fund capital losses did not impact on the Council's General Reserve position at 30 September 2023 because of current statutory accounting arrangements which are in place. These arrangements are due to come to an end in 2024-25. Any unrealised capital losses compared to the £70.000m total nominal value of these funds will first impact on the Council's General Reserve position on 31 March 2026. To plan for this, the Council previously transferred revenue savings to an investment losses contingency earmarked reserve. This reserve balance was £2.500m at

30 September 2023. Corresponding total unrealised capital losses at that date were £6.626m.

- 4.41 Financial market conditions were volatile during the six-month period to 30 September 2023. Global bond yields increased and remained elevated as it became apparent that policymakers were looking to keep rates high for some time amid persistently higher core inflation and tight labour markets.
- 4.42 The UK, Eurozone area and US equity markets were initially helped by resilient growth data and diminishing talk of recession. A weaker currency and better-than-expected indicators were broadly supportive for UK equities. Much of the US stock market's performance was driven by a small number of large stocks and enthusiasm over artificial intelligence. However the global outlook was clouded by a slowdown in China. On a sectoral level, the energy sector was supported by higher oil prices and expectation of decreasing supply due to an agreement on production cuts. The FTSE All Share index was marginally lower at the end of the 6-month period than it had been at the start. The MSCI All Countries World Index was also marginally higher by the end of the period.
- 4.43 For existing longer-term investors in fixed income securities (bonds), the prospect of a higher-for-longer rate environment weighed on market expectations. Bond yields increased in Q2 2023-24, on the expectation that central banks would continue increasing rates but fell in August 2023, as investors grew confident that policy rates were close to their peak. However, they then increased again in September 2023, as oil prices climbed. There was also some effect from quantitative tightening by the BoE. This affected capital values of the Council's bond fund during the six-month period to 30 September 2023 and, to a lesser extent, the multi-asset funds, where there was some offset from equity performance.
- 4.44 Investor sentiment for UK commercial property was more settled than in Q3 and Q4 of 2022-23, when the sharp rise in bond yields resulted in a big fall in property valuations. There were signs of returning investor interest, occupier resilience and a perception that the downturn in commercial real estate may be ending. It helped rental income and led to some stabilisation in capital values. However, the combination of high interest rates and bond yields, higher funding costs and the prospect of sluggish economic growth constrained the outlook for commercial property.

- 4.45 The combination of the above factors set out in paragraphs 4.41 to 4.44 had a marginal effect (-1.9%) on the combined value of the Council's strategic funds from the start of the period in April 2023 to September 2023. Income from the Council's bond funds has improved as maturing securities are replaced by higher yielding securities in these funds.
- 4.46 Although these funds have no defined maturity date, cash is available for withdrawal after a short notice period (except for the Property Fund which is a minimum of 6 months' notice). The performance and continued suitability in meeting the Council's medium- to long-term investment objectives are regularly reviewed. Strategic fund investments are made in the knowledge that capital values will move both up and down on months, quarters and even years; but with the confidence that over a three- to five-year period total returns should exceed cash interest rates. Table 6 below summarises the current value of each investment, alongside the cumulative income since the date of the investment.

Table 6

 Fund	Investment	Date	Current Value	Cumulative Income
Aegon (Kames)	10,000,000	20/09/2018	8,759,899.38	2,820,836
CCLA LAMIT	25,000,000	30/06/2015	22,712,511.00	6,861,672
CCLA DIF	5,000,000	12/09/2017	4,602,441.10	999,907
M&G - Bond	5,000,000	25/05/2018	4,525,264.83	881,306
M&G - Global Equity	5,000,000	25/05/2018	6,254,750.13	1,042,549
Ninety One (Investec)	10,000,000	27/11/2017	8,623,853.50	2,360,919
Schroders	10,000,000	12/06/2018	7,895,057.18	3,390,995
TOTAL	70,000,000		63,373,777.12	18,358,184

Capital	
Loss	-6,626,222.88
Total	
Return	11,731,961.02

4.47 In light of their performance over the medium-term, investment in these funds has been maintained. The Council is using the alternative fair value through profit and loss (FVPL) accounting method to account for them, which means that if there are any long term unrealised losses in the funds' fair values there will not be an immediate impact on the Council's General Reserve balance. The

date for this impact was to be 2023-24 at the earliest. The Department for Levelling Up, Housing and Communities (DLUHC) published a consultation on the 'IFRS 9 pooled investment fund statutory override for English authorities for fair value gains and losses on pooled investment funds', which was due to expire with effect from 2023-24. The options under evaluation were to allow the override to lapse, to extend it, or to make it permanent. Following this consultation, DLUHC extended the override for a further two years and the earliest impact of any unrealised losses on the Council's General Reserve balance will now be in 2025-26.

Net Investment Income

- 4.49 Overall, during 2023-24, the Council forecasts that it will receive £3.439m of net investment income from its investments (£12.582m investment income less £9.143m short-term borrowing costs) against a budget of £4.663m. This includes £2.3m of interest costs relating to the increased need to borrow because of the Derby and Derbyshire Waste Treatment Centre legal settlement in July 2023.

Other Non-Treasury Holdings and Activity

- 4.50 The definition of investments in CIPFA's Treasury Management Code covers all the financial assets of the Council as well as other non-financial assets which the Council holds primarily for financial return. Investments that do not meet the definition of treasury management investments (i.e. management of surplus cash) are categorised as either for service purposes (made explicitly to further service objectives) and or for commercial purposes (made primarily for financial return). Investment Guidance issued by the Department for Levelling Up Housing and Communities (DLUHC) also includes within the definition of investments all such assets held partially or wholly for financial return. At 30 September 2023, the Council held £13.944m of Non-Treasury investments.
- 4.51 Of the total balance of £13.944m of the Council's other non-treasury holdings at 30 September 2023, £13.480m is in respect of a regeneration loan to a local business, Buxton Crescent Hotel Ltd. This has increased £0.427m since 31 March 2023 as a result of the capitalisation of interest until loan repayments commence.
- 4.52 The other loan of £0.464m is to Chesterfield Football Club Community Trust. The loan was agreed to continue their sports and community programmes with schools and community groups in the greater Chesterfield area. Capital repayments commenced during the period

to 30 September 2023.

Treasury Performance

- 4.53 The Council measures the financial performance of its treasury management activities both in terms of its impact on the revenue budget and its relationship to benchmark interest rates, as shown in Table 7 below.

Table 7: Performance

	Forecast 2023-24 £m	Budget (CFR) £m	Over/ (Under) £m	Interest Actual %	Interest Other LA (Counties) Benchmark %	Interest Over/ (Under) %
Interest paid on long-term and short-term borrowing	19.928	16.258	-3.670	4.47	No data held	N/A
Interest received on treasury investments	12.582	4.663	+7.919	4.02	4.49	-0.47

Compliance Report

- 4.54 The Director of Finance & ICT reports that all treasury management activities undertaken during the first half of 2023-24, to 30 September 2023, complied fully with the principles of the Treasury Management Code and the Council's approved Treasury Management Strategy.
- 4.55 Compliance with the authorised limit and operational boundary for external debt is demonstrated in Table 8 below and compliance with specific investment limits is demonstrated in Table 9 below.

Table 8: Debt Limits

2023-24	30 Sept	2023-24	2023-24
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	Maximum £m	2023 Actual £m	Operational Boundary £m	Authorised Limit £m	Complied
Total debt	593.852	593.852	776.000	813.000	✓

Table 9: Investment Limits

	2023-24 Maximum * £m	2023-24 Limit £m	30 Sept 2023 Actual £m	Complied
Any single organisation, except UK Government and Main Bank	30.000	30.000	30.000	✓
Main Bank (Lloyds)	59.134	60.000	39.569	✓
Any group of organisations under the same ownership	30.000	30.000	30.000	✓
Any group of pooled funds under the same management	30.000 nominal	30.000 nominal	30.000 nominal	✓
	10.000	10.000	5.000	
Registered providers and registered social landlords	individual 10.000	individual 50.000	individual 10.000	✓
	total	total	total	
Negotiable instruments held in a broker's nominee account	43.379	100.000 per broker	39.553	✓
Limit per country (ex UK)	23.004	30.000 each	0	✓

*Maximum held at any one time.

Treasury Management Indicators

4.56 As required by the 2021 CIPFA Treasury Management Code, the Council monitors, measures and manages its exposures to treasury

management risks using the following treasury management prudential indicators.

- 4.57 **Liability Benchmark:** This new indicator compares the Council's actual existing borrowing against a liability benchmark that has been calculated to show the lowest risk level of borrowing. The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. It represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments at the minimum level of £10m required to manage day-to-day cash flow.

Table 10 – Liability Benchmark

	31.3.23 Actual	31.3.24 Forecast	31.3.25 Forecast	31.3.26 Forecast
Loans CFR	539.097	659.712	659.712	659.712
Less: Balance sheet resources	-427.739	-239.959	-239.959	-239.959
Net loans requirement	111.358	419.753	419.753	419.753
Plus: Liquidity allowance	10.000	10.000	10.000	10.000
Liability benchmark	121.358	429.753	429.753	429.753
Existing/forecast borrowing	490.079	400.174	261.429	256.429

- 4.58 **Maturity Structure of Borrowing:** This indicator is set to control the Council's exposure to refinancing risk. Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment. The upper and lower limits on the maturity structure of all borrowing were:

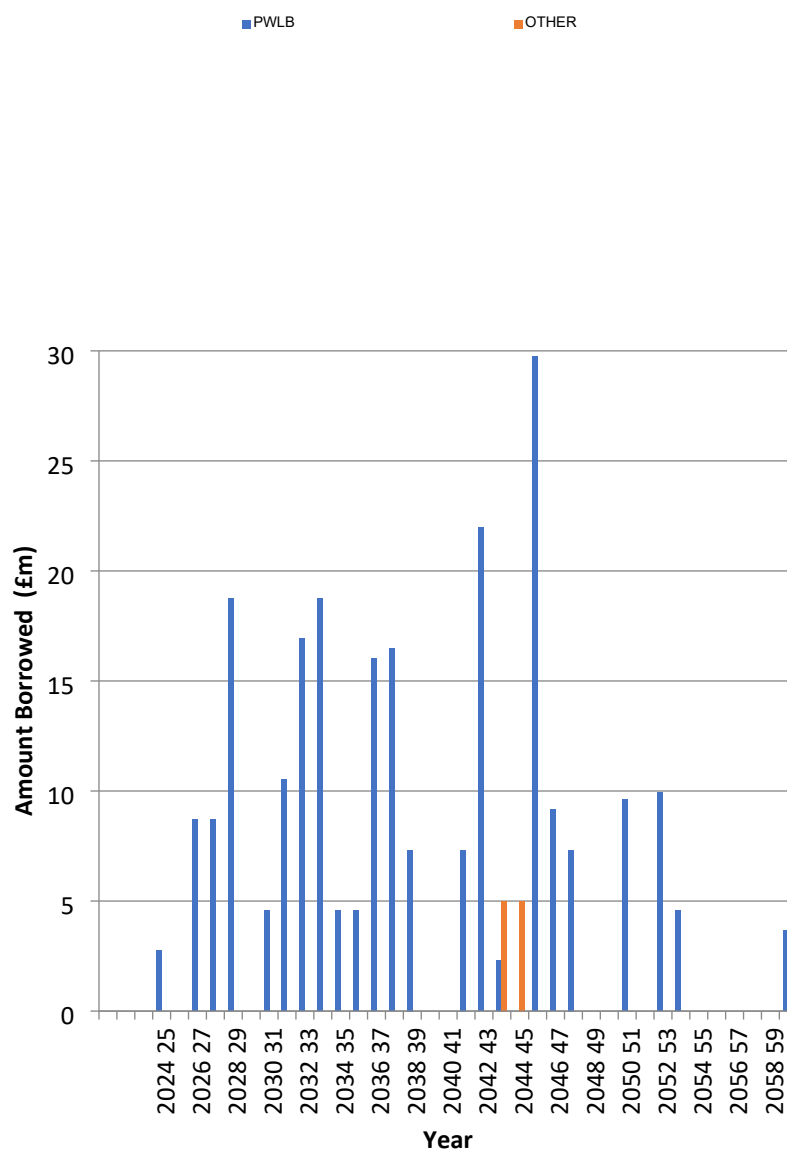
Table 11: Maturity Structure of Borrowing

	30 Sept 2023 Actual	Upper Limit	Lower Limit	Complied
	%	%	%	
Under 12 months	50	60	0	✓
12 - 24 months	1	20	0	✓
24 months - 5 years	9	20	0	✓
5 - 10 years	9	20	0	✓
10 - 20 years	17	40	10	✓
20 - 30 years	13	40	10	✓
Over 30 years	1	40	0	✓
Total	100			

- 4.59 The Council's long term maturity repayment profile at 30 September 2023 is shown in the Chart below. A good spread of maturities is desirable. The average long term (loans over 1 year in duration) redemption is £6.976m per year over the next 35 years. The maximum redemption is £29.738m in 2045-46. The average duration of all the Council's loans is approximately 15 years. Any new borrowing would be targeted for maturity in years with nil/low repayments.

Chart: Maturity Profile of Long-Term Borrowing

Long Term Borrowing - Maturity Profile



4.60 **Long-Term Treasury Management Investments:** The purpose of this indicator is to control the Council's exposure to the risk of incurring losses by seeking early repayment of its investments. The prudential limits on the long-term treasury management limits are:

Table 12 – Long Term Treasury Management Investments

Loans Maturing =>	Beyond 31 March 2024 £m	Beyond 31 March 2025 £m	Beyond 31 March 2026 £m
Actual principal invested beyond the year end	63.374	63.374	63.374
Limit on principal invested beyond the year end	150.000	125.000	100.000
Complied?	✓	✓	✓

Long-term investments with no fixed maturity date include strategic pooled funds but exclude money market funds and bank accounts with no fixed maturity date as these are considered short-term.

Additional indicators

- 4.61 **Security:** The Council has adopted a voluntary measure of its exposure to credit risk by monitoring the value-weighted average credit rating of its investment portfolio.

Table 13: Security

	30 Sept 2023 Actual	2023-24 Target	Complied
Portfolio average credit rating	A+	A	✓

- 4.62 **Liquidity:** The Council has adopted a voluntary measure of its exposure to liquidity risk by monitoring the amount of either cash available to meet unexpected payments within a rolling three-month period, without additional borrowing, or the amount it can borrow each period without giving prior notice.

Table 14: Liquidity

	30 Sept 2023 Actual £m	2023-24 Target £m	Complied
Total cash available within 1 month OR	128.067	10.000	✓
Total sum borrowed in past 3 months without prior notice	132.000	30.000	✓

- 4.63 **Interest Rate Exposures:** This indicator is set to control the Council's exposure to interest rate risk. The BoE official Bank Rate increased by 1.25% from 4.25% on 1 April 2023 to 5.25% by 30 September 2023.

Table 15: Interest Rate Exposures

	30 Sept 2023 Actual £m	2023-24 Limit £m	Complied
Upper limit on one-year revenue impact of a 1% <u>rise</u> in interest rates.	1.120	1.477	✓
Upper limit on one-year revenue impact of a 1% fall in interest rates	N/A	-1.508	✓

- 4.64 The impact of a change in interest rates is calculated on the assumption that maturing investments and short-term borrowing will be replaced at current rates.

Other

- 4.65 **IFRS 16:** The implementation of the new IFRS 16 Leases accounting standard was due to come into force for local authorities from 1 April 2022. Following a consultation, CIFPA/LASAAC announced an optional two-year delay to the implementation of this standard, a decision which was confirmed by the Financial Reporting Advisory Board in early April 2022. The Council will adopt the new standard on 1 April 2024.

5 Consultation

- 5.1 No consultation is required.

6 Alternative Options Considered

- 6.1 N/A - the Council is required to have a Treasury Management Strategy each year, to monitor against it and to produce a Treasury Management Annual and Semi-Annual Report. This report fulfils the Council's legal obligation under the Local Government Act 2003 to have regard to the CIPFA Code by producing a semi-annual treasury report. If the Council chose not to prepare this semi-annual Report it would be in contravention of the Council's Financial Regulations and other legislation and statutory guidance.

7 Implications

- 7.1 Appendix 1 sets out the relevant implications considered in the preparation of the report.

8 Background Papers

- 8.1 None identified.

9 Appendices

- 9.1 Appendix 1 - Implications.

10 Recommendation

- 10.1 That Cabinet notes the report on Treasury Management activities during first half of 2023-24, to 30 September 2023, and the Council's compliance with the prudential indicators set by Council at its meeting of 15 February 2023, in accordance with the the CIPFA Code.

11 Reasons for Recommendation

- 11.1 The Council is committed to ensuring good financial management and compliance with applicable laws and regulations.
- 11.2 Treasury Risk Management at the Council is conducted within the framework of CIPFA's "*Treasury Management in the Public Services: Code of Practice 2021 Edition*" (the CIPFA Code) which requires the Council to approve a Treasury Management Strategy before the start of each financial year, quarterly reports and annual treasury outturn report. This report fulfils the Council's legal obligation under the Local Government Act 2003 to have regard to the CIPFA Code by producing a half year report for 2023-24 and also assists with the requirements in the Council's Financial Regulations, which require that the borrowing and investments of the Council should be arranged in such a manner so as to comply with the CIPFA Code of Practice on Treasury Management.

11.3 The report on treasury management activities for the first half of 2023-24 highlights the borrowing strategy and investments position of the Council during the first six months of 2023-24. It also highlights the Council's performance and compliance with targets agreed as part of the Treasury Management Strategy 2023-24.

12 Is it necessary to waive the call-in period?

12.1 No

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Implications

Financial

- 1.1 The Treasury Management Half Year Report 2023-24 sets out in paragraphs 4.03 to 4.12 external factors impacting on Treasury Management in the first half of 2023-24, to 30 September 2023. This covers economic background, financial markets and credit background. The report then details in paragraphs 4.13 to 4.49 the Council's Treasury Management activity and position during the first half of 2023-24. This highlights the borrowing and investments positions of the Council during the first half of 2023-24. Other non-Treasury holdings and activity are referred to in paragraphs 4.50 to 4.52 and Treasury performance in paragraph 4.53. Finally, the report considers in paragraphs 4.54 to 4.64 the Council's compliance with prudential indicators and targets agreed as part of the Treasury Management Strategy 2023-24.
- 1.2 On 30 September 2023, the Council had net borrowing of £142.178m arising from its revenue and capital income and expenditure, as shown in Table 2, at paragraph 4.14. The Council held a significant level of invested funds in the first half of 2023-24, representing income received in advance of expenditure plus balances and reserves held. In 2023-24, the Council continued to pursue its strategy of keeping borrowing and investments below their underlying levels, sometimes known as internal borrowing, in order to reduce risk and keep interest costs low. The Council has an increasing Capital Financing Requirement because of its capital programme.
- 1.3 At 30 September 2023, the Council is forecasting interest payments on capital and temporary borrowing of £19.928m against a budget of £16.258m and interest receipts on treasury investments of £12.582m against a budget of £4.663m, as shown in Table 6, at paragraph 4.53.
- 1.4 The Compliance Report confirms that the Council complied with the prudential indicators set by Council at its meeting of 15 February 2023, in accordance with the Chartered Institute of Public Finance and Accountancy's *"Treasury Management in the Public Services: Code of Practice 2021 Edition"* (the CIPFA Code).

Legal

- 2.1 The Treasury Management function for borrowing and investment forms part of the prudential funding structure established by the Local Government Act 2003. Local authorities are required to have regard to a range of guidance when exercising these powers.
- 2.2 Treasury Risk Management at the Council is conducted within the framework of CIPFA's "*Treasury Management in the Public Services: Code of Practice 2021 Edition*" (the CIPFA Code) which requires the Council to approve a Treasury Management Strategy before the start of each financial year and a semi-annual and annual treasury outturn report. This report fulfils the Council's legal obligation under the Local Government Act 2003 to have regard to the CIPFA Code, by reporting on the first half year for 2023-24, and also assists with the requirements in the Council's Financial Regulations, which require that the borrowing and investments of the Council should be arranged in such a manner so as to comply with the CIPFA Code of Practice on Treasury Management.

Human Resources

- 3.1 None

Information Technology

- 4.1 None

Equalities Impact

- 5.1 None

Corporate objectives and priorities for change

- 6.1 The Council is committed to ensuring good financial management and compliance with applicable laws and regulations. The Council has borrowed and invested substantial sums of money and is therefore exposed to financial risks including the loss of invested funds and the revenue effect of changing interest rates. The successful identification, monitoring and control of risk remains central to the Council's Treasury Management Strategy.

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)

- 7.1 None



FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

CABINET

7 December 2023

Report of the Director of Finance & ICT

Capital budget monitoring and forecast as at Quarter 2 2023-24
(Corporate Services and Budget)

1. Divisions Affected

1.1 County-wide

2. Key Decision

2.1 This is a Key Decision because it is likely to result in the Council incurring expenditure which is, or savings which are, significant, having regard to the budget for the service or function concerned (this is currently defined as £0.500m).

3. Purpose

3.1 To inform Cabinet of the latest Capital budget monitoring position as at 30 September 2023.

4. Information and Analysis

4.1 The report includes Cabinet approved schemes that have been active during this financial year, including schemes closed in year. All schemes have a nominated budget holder who is responsible for ensuring the scheme stays within budget, and who provides the projected spend figures. The schemes have been approved over several previous years in addition to the current year.

- 4.2 The 2023-24 capital programme is £313.436m, approved adjustments to this figure have increased this to £316.881m. The main reason for this increase is additional funding sources, including an additional grant of £4.213m for Pothole works. This is offset by some minor reductions in other funding. The budget for schemes being monitored this year (which includes schemes from prior years programmes) total £719.283m, of these, £663.611m are currently open schemes. There is a forecast underspend of £13.638m over the life of these projects (see Appendix 2).

4.3 **Adult Social Care & Health - projected underspend of £1.248m**

Adult Care has a budget of £91.854m comprised of 19 schemes. Five schemes account for 78.08% of the budget. These are summarised in the table and narrative below. £1.000m of the underspends are on Belper and Heanor Integrated Specialist Facilities with more detail being included below.

Major Schemes	Budget £m	Spend to Date £m	Forecast £m	(Under) /Over spend £m
Disabled Adaptations 2020 - 2023	20.833	17.552	20.833	0.000
Belper Integrated Specialist Facilities Centre	15.613	14.841	15.113	(0.500)
Bennerley Avenue – Care Home	15.000	13.669	15.000	0.000
Darley Dale Specialist Community Care Centre	10.520	10.423	10.518	(0.002)
Heanor Specialist Community Care Centre	9.750	8.968	9.250	(0.500)

Disabled Adaptations

The Disabled Adaptations schemes are the currently open programmes which relate to aids and adaptations installed in resident's own homes so they may remain as independent as possible. They will be fully financed from borrowing together with contributions from clients and district councils. Currently the projected spend is in line with the budget. Previously reported underspends on prior years programmes have been allocated to new adaptation projects. This had initially been intended to fund a new scheme to replace Telecare equipment but the demand for adaptations is utilising the budget. A separate budget of £1.250m was

approved by Full Council in February 2023 for a project to provide the Telecare equipment and is being funded from borrowing.

The Belper Integrated Specialist Facilities Centre

This major care home scheme (operational since 2020) is almost finalised and retention to the main contractor has been released. There is a requirement to improve car park security, and options are currently being explored. An underspend of £0.500m is anticipated after the security works are complete.

Bennerley Avenue - Care Home

This major care home scheme (operational since 2022) is almost finalised, and the defects period ended in August 2023. The final certificate is due shortly.

The business case specification is being prepared for phase 2 of the development and potential third-party investors will be invited to submit expressions of interest on the site.

Darley Dale Specialist Care Centre

This care centre scheme is substantially complete (operational since 2016) with some minor works and retention fees outstanding. The final certificate has not yet been issued. Despite numerous attempts to repair satisfactorily, the roof still continues to leak. Specialist testing was carried out in November 2022 with the results issued to a Laboratory in Germany for interpretation. The Contractor has completed the schedule of repairs and is currently procuring a roofing contractor to carry out the works on site. The original roofing contractor has gone into liquidation. The specialist nature of the turf roof means that there are limited numbers of contractors available to carry out the works- all of whom were fully committed over the summer. A contractor has now been procured and work on site is now expected by the end of December 2023.

Heanor Specialist Care Centre

This care centre (operational since 2015) is now substantially complete with the final certificate issued, an underspend of £0.500m is anticipated.

4.4 Children's Services - projected underspend of £7.473m.

This is across multiple projects with the highest being £0.365m. Many of these are subject to confirmation by Senior management within Children's Services following recommendations from the Head of Governance, Compliance & Performance.

Children's Services has a budget of £189.486m comprised of 745

schemes. Five schemes account for 25.12% of the budget. These are summarised in the table and narrative below.

Major Schemes	Budget £m	Spend to Date £m	Forecast £m	(Under) /Over spend £m
Alfreton Park School Replacement	13.947	13.523	13.947	0.000
Clover Leys Academy new school	11.821	3.188	11.821	0.000
Bramley Vale Primary Replacement	8.564	1.907	8.564	0.000
Tibshelf New Primary School	7.013	0.018	7.013	0.000
Highfield Farm School	6.253	5.531	6.253	0.000

Alfreton Park School

Phase 1 achieved practical completion and hand-over of the new school took place on 4 March 2022. Phase 2 works including demolition of the old school building, landscaping and installation of an adventure playground completed in November 2022. The adventure playground is now open to the public but the legal process of land transfer to Amber Valley BC is still in progress. The defects period for Phase 1 ended September 2023 with Phase 2 ending 2024. Phase 2 still has some outstanding works remaining. The project is running to its revised budget of £13.947m with £0.424m remaining. The issues identified with manhole covers have now been rectified.

Clover Leys Academy New School

This school was previously reported as Boulton Moor before the name was finalised. It is being funded by S106 contributions. Delays due to legal issues relating to site access have been resolved and access land has been purchased. A further £2.351m has been assigned to this project during Q2 from the 2023-24 Basic Need allocation, by Cabinet on the 21 September 2023. The temporary school at Chellaston Fields was ready by September. Work is now proceeding onsite for the main scheme, with an expected completion date of September 2024. Currently £3.188m has been spent from the £11.821m budget.

Bramley Vale

The project at Bramley Vale Primary School is for the replacement of all the school, except for the Foundation Unit and a single block. Morgan Sindall have been engaged via the SCAPE framework. During Q2 a further £1.138m has been allocated to this project from the 2023-24 School Condition Allowance. This was approved by Cabinet on 27 July

2023. The temporary school accommodation was ready for September. Demolition works and remodelling works are underway, with a projected completion date of 31 March 2025.

Tibshelf New Primary School

The scheme for the new 'Federated' school at Tibshelf suffered substantial inflation to the cost estimates partly due to a delay to the anticipated scheme start date. The cost is now anticipated to be £12.500m. Additionally, it is expected that the capital receipt will be reduced by £1.390m. Therefore, an additional £6.760m of borrowing was required and a capital bid for this was prepared for the 2023-24 Capital Programme. This was rejected, and a bid for the 2024-25 Capital Programme has been submitted.

Highfield Farm School

The new build at Highfield Farm School was completed in August 2020. However, there are some minor defects outstanding. Of the remaining budget of £0.723m, £0.381m relates to furniture and IT which will be recharged by the Spencer Academy Trust in due course and the balance relates to outstanding fee invoices.

4.5 Corporate Services and Transformation - projected overspend of £2.663m

Corporate Services and Transformation has a budget of £46.074m comprised of 351 schemes. Six schemes account for 30.287% of the budget. These are summarised in the table and narrative below. There is a requirement to provide additional funding to the SAP S/4 upgrade (see below) which is partly offset by multiple underspends. Some of these underspends are subject to confirmation by Senior management following recommendations from the Head of Governance, Compliance & Performance.

Major Schemes	Budget £m	Spend to Date £m	Forecast £m	(Under) /Over spend £m
Williamthorpe Solar Farm	3.750	0.031	3.750	0.000
Green Deal and Fuel Poverty grant	2.521	2.454	2.521	0.000
Glossop 3G Pitch and Changing Room	2.233	1.015	2.233	0.000
SAP S/4 Upgrade	2.000	1.628	8.700	6.700
Replacement ICT Network	1.750	0.000	1.750	0.000
County Hall - Winter Gardens Refurbishment	1.700	0.184	1.700	0.000

Williamthorpe Solar Farm

This solar farm is being developed to generate 3.2m kwh of renewable energy which will offset residual energy use elsewhere - including energy use associated with corporate buildings. This will help achieve the Councils carbon reduction strategy and commitments to achieve net zero. It is anticipated to obtain planning permission by February 2024. The date when this will become operational is expected to be April 2025.

Green Deal and Fuel Poverty Grant

This scheme assists fuel poor Derbyshire residents as part of the Derbyshire Healthy Home Programme. The project comprises of replacement or first-time central heating systems which in some cases will assist with hospital discharges. These schemes, follow referrals by Adult Social Care and Health Services and are the ones not fully funded by other grants. The project has a budget of £2.521m of which £2.454m has already been spent. This has helped around a thousand households over the last ten years. Six households will be helped this year and it is anticipated that there will be a further fifteen next year.

SAP S/4 upgrade

This project is for a major computer system which had an original capital budget of £2.000m. The timeline for completing the project from initial forecasts have varied due to ongoing issues with the ICT infrastructure and other resourcing issues. The completion date is now planned to be Spring 2024. This delay will require a variation in the capital programme of £6.700m. This has been approved by Cabinet on 19 October 2023.

Replacement ICT Network

This project is for the replacement of computer hardware which is over 5 years old. This expenditure is phased over 2 years and supports the ICT Strategy. The scheme is currently expected to spend to budget.

Glossop 3G Pitch and Changing Room

This development is in partnership with Glossop North End football club. Derbyshire County Council has now awarded a £0.070m grant to the project from its Grants Prospectus scheme. There is also significant additional funding coming from other parties including The Football Foundation and High Peak Borough Council. The project was delayed, and costs increased by £0.519mm, due to inflation and identifying necessary upgrades to the site's electricity infrastructure. Despite the increase in costs, the project remains fully funded. Work on the Changing Room commenced in February 2023 and is expected to be completed in November 2023. Works on the 3G pitch commenced in

July 2023 and the expected completion date is now mid-January 2024. Expenditure to date is £1.015m.

County Hall - Winter Gardens Refurbishment

This scheme was commissioned to Concertus Derbyshire Ltd (CDL) for design to upgrade the space to be suitable for functions by bringing up to modern standards. Surveys identified that the costs could be more substantial than budgeted for. The project is currently on hold having spent £0.184m to date. Derbyshire County Council has commissioned HLM Architects, as business case advisors to seek expressions of interest from developers, hotel operators, investors, and others for their ideas on options for the future of the historic estate. The review is anticipated to be completed by December 2023.

4.6 Place - projected underspend of £7.580m.

Place has a budget of £391.868m comprised of 137 schemes. This is approximately 54.48% of the total Capital budget. Six schemes account for 70.16% of the Place budget. These are summarised in the table and narrative below. These schemes have a forecast of £7.580m underspend.

There are projected under and overspend within this net figure; the significant ones are:

- Projected underspend of £3.713m on the LTP budget as a result of receiving an additional amount of £4.213m ring fenced Pothole Grant, more information is included below.
- The 2022 Vehicle Replacement Programme has a forecast underspend of £3.316m, this is due to several departmental reviews being undertaken which is disrupting the replacement schedule.
- There is an underspend of £1.034m on LED Invest to Save project (see below).
- There is also an overspend of £0.667m on the A61 Growth Deal project. Additional funding is being sought to address this.

Major Schemes	Budget £m	Spend to Date £m	Forecast £m	(Under) /Over spend £m
Local Transport Plan & Potholes 2019-2023	133.833	94.578	130.120	(3.713)
Markham Vale Employment Zone	41.583	39.868	41.583	0.000
Waste Project, Derby	35.000	31.272	35.000	0.000
LED Street Lighting	32.100	29.120	31.066	(1.034)
Bus Service Improvement Plan	19.611	2.952	19.611	0.000
Woodville Swadlincote Regeneration Route	12.797	12.429	12.797	0.000

Local Transport Plan including Potholes

The Highways Capital projects are funded from grants provided by the Department for Transport (DfT) comprising of annual LTP and pothole funding and ad-hoc capital allocations. All grants are fully utilised by allocation to projects approved by the Council's Cabinet. The amount of £3.712m showing as an underspend will be allocated to projects with appropriate authorisation. The main reason for this is an additional grant of £4.213m for pothole improvement works, has been received during this quarter, and of this amount £3.692m has not yet been allocated to specific schemes. This grant is welcomed at a time when spending pressures on potholes remain very high. Although not allocated at the end of Q2 it had been earmarked for specific projects. Following Storm Babet in October, a sum of £0.500m has been allocated to provide urgent permanent works to storm damage. Estimation of the final cost of the overall damage is being assessed. As a result of this, additional funding will be required to deliver the earmarked programme of work, or a number of previously approved projects will need to be cancelled or delayed.

The separate yearly schemes that make up the budget total are from between 2019-2023. These schemes totalling £133.833m are forecast to be fully completed by the end of 2026-27, and the majority being completed by the end of 2024-2025. Progress on these schemes has been satisfactory despite continuing inflationary pressures and this summer saw successful delivery of some significant resurfacing and surface treatment works. Projects will continue through winter, working towards the objective of delivering £120.000m of improvements on the network between April 2021 and March 2024.

Capital expenditure and progress is constantly being monitored. Governance has been improved by the implementation and embedding of the Highways Capital Programme Board and utilisation of the Programme Delivery Office to enable informed decisions to be made in a timely manner.

Markham Vale

An amount of £1.714m remains to be spent from the main approved capital budget. This is currently sufficient to complete the existing schedule of works packages but will continue to be kept under review because of high construction inflationary pressures currently being experienced.

Planning permissions have been secured on two previously prepared plots which are currently under offer. One was legally completed in October 2023 whilst the second one remains under offer. The first plot will generate a capital receipt of £0.543m in October 2024 when agreed works for an electric vehicle forecourt are completed. Subject to completing all necessary legal documentation with investors for the 2nd plot, then a further capital receipt of approximately £0.387m will be secured over the coming 6 to 18 months.

An agreement was legally completed during this quarter for the sale of surplus land which will enable third parties to bring forward development and provides clean title to a further plot that DCC can bring forward for development. This generated a capital receipt of £0.100m. An Option Agreement to sell further surplus land is close to being legally completed. This option will remain open for five years and will generate a capital receipt of £0.930m. Two additional parcels of surplus land are the subject of negotiations, but no terms have yet been agreed.

The Staveley Waterside project comprises a phased mixed-use development. The Council are due to invite tenders for a Design and Build Contract to construct a Phase 1 development within the budgeted estimate of £3.990m. £2.931m of which has been provisionally secured from the Staveley Town Deal fund with the remaining funding comprising £0.250m in-kind land value, £0.150m of DCC Reclamation capital already secured, plus contingency of £0.663m to be funded by capital receipts generated at Markham Vale. Subject to receipt of a satisfactory tender and approval to award, then construction is expected to commence during Q4 2023 and be completed within nine months.

An additional project for Markham Vale Cycling & Walking infrastructure has been set up. It will be fully funded by a grant of £0.750m secured as part of the East Midlands Devolution deal, which was targeted at low carbon initiatives. It has been designed as a new walking/cycling route

to work. Construction on the 2.2km cycleway is expected to be completed by the end of November 2023. Grant funding will be claimed by the end of 2023.

LED Street Lighting

The LED Invest to Save Project is still progressing; however, the nature of the remaining work is more involved than the jobs already completed. The work outstanding includes replacement of electricity cables and installation of crash friendly lighting columns as well as the installation of LED technology. There will be more significant energy savings when this work is completed. Work is currently underway on the A619 Baslow, A5132 Willington and B6179 Kilburn. Work is due to start shortly on the A615 Oakerthorpe, A6008 Heanor to Ilkeston and in 2024 A610 Ripley.

To date energy liability has reduced by 16.5 million kWh (the equivalent of boiling 5.5 million kettles for an hour), furthermore carbon emissions have reduced by 10,800 tonnes. The street lighting service experienced an energy price increase of 51% in April 2023. At current energy prices the project has saved £6m.

The project continues to forecast an underspend, (currently £1.034m) but this figure is subject to volatility in the cost tenders for work. This has been experienced across the lighting industry and the Highway Electrical Association are forecasting this trend to continue going forward.

Waste Project

In 2009, RRS - a partnership between infrastructure firm Interserve and waste management company Renewi - was awarded a contract by Derby City Council and Derbyshire County Council to manage the Councils' residual waste and design, build, commission, and operate a waste treatment facility in Sinfin, Derby. The contract was terminated on 2 August 2019 following the failure of RRS to pass acceptance tests. In May 2022 RRS commenced formal court proceedings against the Councils.

In July 2023 after several months of negotiations the Councils reached settlement of the litigation out of court. The Council's share of the settlement was £56.93m. With this settlement, litigation has ended and RRS has no further involvement.

Following completion of a Full Business Case on 2 February 2023 both Councils' Cabinets approved a recommendation to repair the waste treatment facility and bring it into operation, as it is the more cost-effective option when compared with closing the facility and disposing of

the councils' waste using a third party. Rectifying the facility will give the councils more certainty over the future cost of dealing with household waste that residents either cannot or choose not to recycle. Work is now progressing on the appointment of specialist contractors to carry out the rectification work and operate the facility.

The project costs also include the ongoing costs of preservation and maintenance of the waste treatment facility until it is rectified and back in operation.

Bus Service Improvement Plan (BSIP)

This is being funded by ring-fenced grant of £19.611m from the Department for Transport. £2.952m had been spent to the end of Q2. There is also a revenue element to this project which has also been funded by grant. The allocation was over three years, a reduction in timescale of two years from the original funding application guidelines. Funding for year 1 was received in November 2022 reducing year one to effectively four months to undertake the work. Funding for Year 2 was received at the end of June reducing Year 2 to 9 months. The programme of BSIP work incorporates a wide range of ambitious projects ranging from, the application of bus priority measures for late running buses at all traffic signalled junctions in Derbyshire, additional bus services and improved bus timetables, a new Travel Derbyshire website and journey planner, increased connectivity and accessibility for residents, businesses, and visitors to Derbyshire through provision of new or improved Transport Hubs.

Woodville-Swadlincote Regeneration Route

The Woodville-Swadlincote Regeneration Route has been developed as a key enabler of regeneration set out in the South Derbyshire Local Plan, bringing former industrial land back into use for both housing and commercial development. It leads directly to the provision of 300 homes and an estimated 580 jobs, with significant additional employment anticipated across a wider area stimulated by this core investment. The route is approximately 1.1km in length and is a combination of new construction and the upgrading of what was a cul-de-sac through an industrial estate. The scheme became operational in 2021 and is expected to remain within its budget of £12.797m. The works are now complete with the final expenditure of £0.369m being the remaining legal expenses. To be completely closed by the end of March 2025.

Elvaston Castle Masterplan

Currently work continues on the Masterplan for Elvaston. The project is addressing a number of issues, including construction cost inflation, uncertainty over availability of external grants and planning applications awaiting determination.

These issues along with the current DCC wide budget issues means that a re-assessment of the plan is prudent. This re-assessment is work in progress and recommendations on a revised approach will be made once concluded. It is currently anticipated that Cabinet will receive a report and recommendations at its meeting of 11 January 2024.

4.7 Top Ten Capital schemes by value

Set out in Appendix 3 is a summary of the ten largest current capital schemes, representing approximately 47.3% of the current budget. These schemes are currently projected to underspend by £5.246m. This is attributable to underspends on The LTP the LED Invest to Save project and Belper integrated specialist facilities, previously mentioned.

5. Consultation

5.1 Not directly arising out of this report.

6. Alternative Options Considered

6.1 Do Nothing - The Council's Financial Regulations require the preparation and submission of reports to Cabinet on the projected expenditure and resources compared with approved estimates, on a regular basis.

7. Implications

7.1 Appendix 1 sets out the relevant implications considered in the preparation of the report.

8. Background Papers

8.1 None Included.

9. Appendices

9.1 Appendix 1- Implications.
Appendix 2- Summary of Projected Capital spend by Department
Appendix 3-Top Ten Capital Projects According to Budget Value

10. Recommendation(s)

10.1 That Cabinet notes the current position on the monitoring of Capital schemes.

11. Reasons for Recommendation(s)

- 11.1 To ensure that the Council is complying with best practice in providing regular capital reports to all key stakeholders regarding capital estimates and expenditure.

12. Is it necessary to waive the call in period?

- 12.1 No

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Implications

Financial

- 1.1 The current Capital Programme forecast indicates an overall underspend of £13.368m against a total programme of £719.283m, over the life of the programme up until 2026-27 as set out in Section 4 of the report.

Legal

- 2.1 None directly arising out of this report

Human Resources

- 3.1 None directly arising out of this report.

Information Technology

- 4.1 None directly arising out of this report.

Equalities Impact

- 5.1 Not directly arising out of this report.

Corporate objectives and priorities for change

- 6.1 None directly arising out of this report.

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)

- 7.1 None directly arising out of this report.

Summary of Projected Capital Spend by Department					Appendix 2					
Department	Current budget	Total spend to date inc commit's	Estimated spend remaining 2023-24	Total projected spend to 31 March 2024	Planned spend 2024-25	Planned spend 2025-26	Planned spend 2026-27	Planned spend 2027+	TOTAL revised planned spend	(Under)/Over
	£m	£m	£m	£m	£m	£m	£m	£m	£m	£m
Adult Social Care & Health	91.854	83.192	5.727	88.919	1.687	0.000	0.000	0.000	90.606	(1.248)
Children's Services	189.486	106.648	35.660	142.308	33.122	6.583	0.000	0.000	182.013	(7.473)
Corporate Services and Transformation	46.075	17.658	19.120	36.778	11.476	0.473	0.011	0.000	48.738	2.663
Place	391.868	279.213	65.900	345.113	37.249	1.568	0.358	0.000	384.288	(7.580)
Grand Total	719.283	486.711	126.407	613.118	83.534	8.624	0.369	0.000	705.645	(13.638)

Top Ten Capital Projects According to Budget Value						Appendix 3				
	Approval Year	Current Budget	Total spend to date inc commit's	Estimated spend remaining 2023-24	Total projected spend to 31 March 2024	Planned spend 2024-25	Planned spend 2025-26	Planned spend 2026+	TOTAL Revised planned exp'	(Under) / Over
		£m	£m	£m	£m	£m	£m	£m	£m	£m
Local Transport Plan including Potholes 2018-2023	2018 - 2023	133.833	94.578	24.161	118.739	11.191	0.135	0.055	130.120	(3.713)
Markham Employment Growth Zone	1989	41.583	39.868	0.715	40.583	0.750	0.250	0.000	41.583	0.000
New Waste Treatment Facility Derby	2019	35.000	31.272	3.728	35.000	0.000	0.000	0.000	35.000	0.000
LED Street Lighting	2015	32.100	29.120	0.686	29.806	1.260	0.000	0.000	31.066	(1.034)
Disabled Facilities Major Adaptations	2019 – 2023	20.833	17.552	2.673	20.225	0.608	0.000	0.000	20.833	0.000
Bus Service Improvement Plan	2022	19.611	2.952	10.388	13.340	6.271	0.000	0.000	19.611	0.000
Belper Integrated Specialist Facilities	2012	15.613	14.840	0.273	15.113	0.000	0.000	0.000	15.113	(0.500)
Bennerley Avenue Care Home	2020	15.000	13.669	1.331	15.000	0.000	0.000	0.000	15.000	0.000
Alfreton Park Special School	2017	13.947	13.523	0.000	13.523	0.424	0.000	0.000	13.947	0.000
Woodville Swadlincote Regeneration Route	2019	12.797	12.429	0.060	12.489	0.309	0.000	0.000	12.798	0.001
TOTAL		340.317	269.803	44.015	313.818	20.813	0.385	0.055	335.071	(5.246)



FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

CABINET

Thursday, 7th December 2023

Report of the Executive Director - Corporate Services and Transformation and the Director of Finance and ICT

Community Safety service – Budget virement
(Cabinet Member for Health and Communities)

1. Divisions Affected

1.1 County-wide

2. Key Decision

2.1 This is not a Key Decision

3. Purpose

The purpose of this report is to seek approval for the virement of a budget from Corporate Services and Transformation (CST) to Adult Social Care and Health (ASCH) to facilitate the movement of the Community Safety service into ASCH from CST.

4. Information and Analysis

4.1 Community Safety as a service currently sits within Communications and Customers in CST.

4.2 It has been identified that several of Community Safety's statutory and non-statutory duties have joint responsibilities with ASCH and therefore

operational and strategic advantages could be gained by realigning the service to sit under Public Health within ASCH.

Directors of Public Health in Local Authorities have a statutory duty under Section 73A(1) of the National Health Service Act 2006 to take steps to improve the health of the people in their area. The determinants of health are multi-factorial, and community safety and the perception of how safe a local community is impacts on individuals' health status and population health outcomes.

- 4.5 Mandated Local Authority Public Health services, and those that are a requirement of the Public Health grant, where there is crossover between the work of Community safety and Public Health include commissioning of Drug and Alcohol Treatment Services, Sexual Health services (with partnership working between the Integrated Sexual Health Service commissioned by Public Health and Sexual Assault and Abuse services) and 0-5 Public Health Nursing (with links to the children safeguarding agenda), as well as safeguarding of vulnerable adults through mandated Public Health commissioned services.
- 4.6 In addition, there is collaborative working in place between Community Safety and Public Health on other joint agendas such as alcohol licensing applications (where the DPH has responsibility for Local Authority's Public Health as a responsible authority under the Licensing Act), serious violence (with the Serious Violence Duty Statutory Guidance highlighting Local Authority responsibilities across Community Safety and Public Health), domestic abuse, mental health and wellbeing, improving the health of offenders, and supporting the health of refugees and asylum seekers.
- 4.7 The Department of Health and Social Care guidance for Directors of Public Health in Local Government: roles, responsibilities and context states that Directors of Public Health should have a role as a system leader to influence all determinants of health, specifically including working with criminal justice partners and Police and Crime Commissioners to promote safer communities.
- 4.8 This Cabinet report seeks approval to agree the virement of Community Safety from CST budget into ASCH budget. This Cabinet report seeks agreement from members that £2.646m is to transfer into the ASCH function. This is made up of £1.141m base budget and £1.505m allocated as a one-off to Community

Safety for a non-ring-fenced grant for Domestic Abuse. Reserves that would also be transferred are outlined in Appendix 1.

- 4.9 Further information on financial implications has been provided in Appendix 1.

5 Consultation

No formal consultation is required to take place. Further detail around HR implications is provided in Appendix 1.

6 Alternative Options Considered

- 6.5 The alternative option considered is to remain as is, with Community Safety remaining as part of Communications and Customers under CST. While this has been and remains a viable option, taking this action would mean failing to capitalise on the advantages offered by the closer alignment between ASCH and Community Safety with regards to joint responsibilities for duties.

7 Implications

- 7.5 Appendix 1 sets out the relevant implications considered in the preparation of the report.

8 Background Papers

None identified.

9 Appendices

- 9.5 Appendix 1 – Implications

10 Recommendation(s)

That Cabinet: Approve the transfer of £2.646m CST budget to ASCH budget to facilitate the movement of the Community Safety service into ASCH from CST along with Reserves as outlined in Appendix 1.

11 Reasons for Recommendation(s)

- 11.5 This approach will ensure that the Community Safety service will be able to benefit from a closer alignment with responsibilities for statutory duties by being part of the ASCH department.

12 Is it necessary to waive the call in period?

No.

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Implications**Financial**

- 1.1 The costs for the Community Safety function can be met from existing budgets and earmarked reserves that currently sit within the Corporate Services and Transformation department.

The following reserves will transfer to Public Health:

Domestic Abuse Contract Support from Public Health	£1.358m
Sexual Violence – CHISVA	£0.040m
Serious Violence	£0.050m
Homes for Ukraine	£10.415m
Domestic Abuse – DHLUC	£0.801m
Syrian Refugee Project	£0.079m
Community Safety reserve	£0.355m
Total	£13.098m

Please note that some of the reserves will need to be drawn down in 2023/24.

- 1.2 Budget virements will be required for a total of £2.558m from CST to transfer into the ASCH function. This is made up of £1.141m base budget and £1.417m allocated to Community Safety to underwrite a ring-fenced grant received for accommodation-based support for Domestic Abuse.

Legal

- 2.1 The rules for virement of budgetary provision from one purpose to another are set out in the Financial Regulations forming part of the Council's Constitution. Amounts greater than £100,000 resulting in a virement of funds between Departments requires Cabinet approval.

Human Resources

- 3.1 For the roles that have been identified to be transferred to ASCH, this is a change in line management only and therefore formal consultation is not required. To enable and support this realignment of roles, informal engagement has taken place with the colleagues who are undertaking the roles identified to transfer to ASCH.

Information Technology

4.1 None identified.

Equalities Impact

5.1 None identified at this time.

Corporate objectives and priorities for change

6.1 Within the Council Plan there is a key action within the Resilient, Healthy and Safe Communities priority to 'Ensure the Council's strategic approach to community safety responds effectively to existing and emerging challenges such as Serious Violence and Violence Against Women and Girls' which the realignment aims to help facilitate more effectively, as outlined in Section 4 of the report.

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)

7.1 None identified.



FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

CABINET

7 December 2023

Report of the Executive Director - Place

Opportunities for the Potential Relocation of Clay Cross and Staveley Libraries - Public Consultation Results

(Cabinet Member for Strategic Leadership, Culture, Tourism and Climate Change)

1. Divisions Affected

1.1 Clay Cross North/South, Staveley and Staveley North and Whittington.

2. Key Decision

2.1 This is a Key Decision because it is likely to be significant in terms of its effect on communities living or working in an area comprising two or more electoral areas in the County.

3. Purpose

3.1 To inform Cabinet of the results of public consultation on the opportunities presented by the Town Deal programmes in Staveley and Clay Cross which support the Council's wider ambitions to deliver high quality, value for money services and aid delivery of Council Plan priorities regarding Library Services.

3.2 To seek approval of Cabinet's 'in principle support' for Chesterfield Borough Council's plans to relocate Staveley library service into a new building (Building 21) within the heart of Staveley town centre.

- 3.3 To set out the potential implications of specific town deal proposals for Derbyshire County Council services and assets (Section 4 and Appendix 1 of the report refer) in supporting the wider regeneration ambitions for Clay Cross and Staveley.
- 3.4 To approve that work, in partnership with Chesterfield Borough Council and North East Derbyshire District Council, progresses at pace to finalise detailed designs and both capital and revenue costings as part of the next steps of project development, ensuring that the full cost of relocation and occupation of new buildings is understood and to agree that relocation will not be supported unless such costs are either the same or lower than existing costs of the library service at these locations.
- 3.5 To advise that further reports will be presented to Cabinet for final consideration once the full cost of proposals are understood.

4. Information and Analysis

Background to the Consultation Exercise

- 4.1 In 2020-2021, Government announced that a total of £3.6billion was to be made available to regenerate over 100 towns across England through a Town Deal Programme. Clay Cross and Staveley were two of three such areas in Derbyshire (Long Eaton being the other one).
- 4.2 Town Investment Plans (TIPs) were required to be set out for each area; proposals in Clay Cross have focused on increasing the skills and productivity of the local workforce, improving access to a range of higher/ better quality jobs and training opportunities and improving the environmental quality of the town centre, ensuring it is a thriving place to live and work. Proposals in Staveley have focused on similar issues and also include a strong focus on opportunities for sustainable travel and transport (for example, mobility hubs and re-opening Barrow Hill rail station).
- 4.3 Whilst proposed relocation of the library into the existing Adult Education facility was included in the original masterplan for Clay Cross (Cabinet Member report Clay Cross Town Deal Outline Business Case, dated 21 December 2022 – Decision Reference D635 refers), the opportunity to relocate Staveley Library into a new town centre building has only recently emerged and proposals are at an early stage of development and require a specific approval in principle.

- 4.4 Library services are currently provided in both Clay Cross and Staveley with the buildings typically being in 'edge of town' locations. Both libraries are classified as 'Tier 3' in the County Council's current Library Strategy. Performance levels for 2022/23 were good, noting the recovery from the pandemic:
- Visitor numbers: Clay Cross 12,725; Staveley 27,569
 - Book issues: Clay Cross 11,898; Staveley 26,826
- 4.5 Having regard to the above context, a joined-up approach to consultation with the public was considered essential to explore the full range of views and opportunities presented by both these proposals. At its meeting on 15 June 2023, Cabinet gave approval to undertake a consultation exercise on proposals to relocate both Clay Cross and Staveley Libraries as part of a programme of work within the respective Town Deals (Minute No. 86/23 refers).

Budget and Strategic Context

- 4.6 In helping to address the current financial challenges, all service areas within Derbyshire County Council are being asked to review areas of expenditure and seek new ways of reducing costs and securing efficiencies. The Library Service currently has a net operating budget of £4.9m constituted (net of some operating costs having been transferred to Corporate Property) mostly of building running costs and staffing.
- 4.7 Members will be aware that a new Library Strategy is being developed as part of the wider drive to secure efficiencies and savings; given recent successes around the co-location of Killamarsh Library with a local leisure centre, the new Strategy is likely to include recommendations to maximise similar opportunities to access grant funding and relocate to modern premises where possible, not least to help reduce running costs.
- 4.8 The proposals to relocate Clay Cross and Staveley Libraries are set within this context. Forensic work is being undertaken by DCC to understand the current, full running costs (controllable and non-controllable spend) of each library; the detailed relocation and running costs of any new buildings is not yet known and work is being undertaken with officers at both Chesterfield Borough Council (CBC) and North East Derbyshire District Council (NEDDC) to ascertain these costs, prior to any final Cabinet approval for relocation being sought. Appendix 1 of this report provides an overview of the issues regarding finance and property assets.

The Consultation Exercise

- 4.9 Consultation commenced on 30 June 2023 and ran until 22 September 2023. Information was publicised through the Council's Website, social media and at Clay Cross and Staveley Libraries. Consultation questionnaires were available online and in physical formats with Library staff supporting direct discussions with members of the public if queried.
- 4.10 The approach to consultation was three-fold: whilst the key area of engagement was around the proposed relocation of the service to alternative premises, the opportunity was also taken to ask about library usage and membership and community participation. These wider responses will be used to help refine the new Library Strategy going forward. Overall, and despite the attempts made to promote the consultation exercise and encourage engagement, the response levels were low – with a total of 88 representations received across both library proposals. The approach to consultation is set out below:

Part 1. Outline of proposals to relocate the library.

Questions were:

- To what extent do you agree or disagree with the proposal to relocate the library as part of the Towns Deal Masterplan?
- Would relocation of the library into the Town Centre cause any additional difficulties?
 - Parking
 - Accessibility
 - None
 - Other
- If 'Other', please specify

Part 2: How to use buildings more effectively, make the best use of space and identify opportunities to link up with key partners.

Questions were

- Are you a library member?
- Which of the following services do you currently visit the library for?
 - Borrow/return books
 - Use the computers
 - Meet with friends
 - Study or to work
 - To read
 - Research (e.g. family history)
 - Leisure

- Look for work/job applications
- Attend Children's events
- Attend Adults events
- Other

Are there any of the following events and activities that you would like to be able to access at the library?

- Exhibiting artwork
- Craft activities
- Music and singing
- Film and photography
- Creative writing
- Author talks
- Local history talks
- Social clubs/support groups
- Healthy lifestyle activities
- Other

If 'Other', please specify:

Part 3: Opportunities to increase membership, participation and engagement in the library services.

Questions were:

- Would you be interested in volunteering at the library in either running a particular event or activity to engage residents in your local community?
- Are you interested in forming or are you already part of a community group that would be interested in accessing funding to run or contribute to running events and activities in the library?
- Would you like to see any providers or partner services e.g. Health partners represented in your library?

- 4.11 The remainder of Section 4 of this report presents a summary of the responses received from the public consultation exercise. Detailed analysis is provided in Appendix 2 - Clay Cross Analysis and Appendix 3 - Staveley Library Analysis. A copy of the Equality Impact Analysis (EIA) that was undertaken to assess the implications of the proposals on Protected Groups is provided at Appendix 4.

Summary of Consultation Responses - Clay Cross Library

- 4.12 A total of 18 responses were received as part of the consultation exercise, equating to approximately 0.1% of the local population. Of those, 16 were library members which is 1.1% of registered library users in Clay Cross. Whilst the proposals to relocate Clay Cross Library

as part of the Town Deal elicited positive comments, some respondents raised concerns, with 44% of people disagreeing or strongly disagreeing with the proposal. NB – it is important to note that where % figures are provided, they represent a very small number of actual respondents, with 18 being the baseline (denominator).

Relocation

- Of those that disagreed with the proposal, 39% of respondents expressed a concern about parking, one stating it was an *'awkward place for car access and out of the way'*. In contrast, one respondent raised that there *'was plenty of parking across the road and in the park area'* although acknowledged that it did need updating.
 - Accessibility was also raised as a concern by 35% of respondents, 50% of whom had a disability.
 - For others that disagreed in general with the relocation, it was commented that the library was better as a *'separate building not part of something else'* and another had concerns about the existing library being *'left to rot'* or *'being knocked down'*.
 - A respondent felt the library was *'well situated'* and moving it *'would not enhance their library experience'*. Another respondent felt that the library would be too far away in the proposed location, although another suggested *'being closer to town would be more convenient'*.
 - Very few of the respondents to the survey said there were no issues with only 10% of people selecting the option

Using Buildings More Effectively

- Perhaps unsurprisingly, the majority of respondents use the library to borrow or return books with 31% of people confirming this. Of the other uses, reading and leisure, using computers and to look for work/job applications were selected.
- Some respondents offered commentary on other uses including *'browsing, local information'* and an interest in *'exhibitions of art'*.
- Another respondent stated that *'a library wasn't a social centre'* and the service should focus on *'anything to do with literacy but not to try to be all things'*. When asked if they would like providers or partner services represented in the library, nearly 40% of respondents agreed with this idea including:
 - Play, reading, rhyming and singing sessions where midwives attended and breast-feeding groups.
 - Job Centre Social Services Health
 - Involvement of health providers/partners to assist support groups benefiting people who feel they are overlooked or do not get chance to talk with others in same situation.

- IT workshops and problem solving

Increasing Membership, Participation and Engagement in the Library Services

- When asked what other possible events and activities the library space could be used for, respondents selected from a number of options. From the results, all available options on activities/events received some selection by respondents, with local history talks being slightly more popular ahead of Author Talks, though Exhibiting Artwork and Craft Activities also received a number of responses.
 - One respondent thought there should be more children's activities and engagement with local schools' and another suggested a book club and *'more children's clubs to involve different age groups in book related activity'*.
 - Another thought, a 'Poetry Open Mic session' would work.
 - In contrast, one respondent suggested that the library should *'not be used for music and crafts'* and new books would be welcome.
- Only one person replied to say they would be interested in volunteering at the library and three responded that they would like to be part of a community group to run events at the library.
- When asked if anything else could improve the library experience, some commented that improved/extended opening hours on an evening and Saturday would be beneficial.
- Few suggested that there should be a wider choice of books and noted that the *'choice of new fiction was limited'*. Another commented that the library experience was *'helped by the knowledge of staff'*.

Summary of Consultation Responses: Staveley Library

- 4.13 A total of 70 responses were received to consultation on the proposed relocation of Staveley library, equating to approximately 0.5% of the local population. Of those, 59 were library members, which is 4.3% of registered library users in Staveley. For all respondents to the consultation, 67% either disagreed or strongly disagreed with the proposal to relocate the library. This compares to 24% who agreed or strongly agreed.

Relocation

- When asked about the library relocation, nearly half of respondents (43%) expressed a concern about parking, though this reduces to only 29% for those that agree or strongly agree with the proposal. Accessibility appeared as less of an issue, with 22% of all respondents and 29% of those who disagree or strongly disagree with the proposal expressing it as a concern.

- For those that agree or strongly agree with the proposal, nearly two thirds (65%) said there were no issues. However, this reduces to only 16% for those that disagree/strongly disagree.
- Cross referencing the demographics shows that people with a disability were more concerned with accessibility, with 50% expressing a concern, whereas those with no disability were more concerned with parking (43%).
- Older age groups also seem more likely to disagree with the proposals - with over 65% of each age group either disagreeing or strongly disagreeing.
- For others that disagreed in general with the proposed relocation, it was commented that the library was '*in a quiet location ideally suited*' and '*one of the best in the country in terms of atmosphere*'.
- One respondent questioned options to explore other sites for redevelopment and another stated there was a '*need to make sure that the current library remained open until the town deal building was built*'.
- For those that agreed or strongly agreed with the proposal, nearly two thirds (65%) said there were no issues. However, this reduces to only 16% for those that disagree/strongly disagree.

Using Buildings More Effectively

- Given users could provide multiple answers to this question, a total of 154 representations were received from the 70 respondents. Perhaps unsurprisingly, most respondents confirmed they use the library to borrow or return books (38%). Of the other options provided, research was the next popular with leisure, to read and to use the computers also getting a reasonable number of responses.
- Others commented they used the printer/photocopier, enjoyed browsing and accessing the Citizens Advice Service.
- When asked if they would like providers or partner services represented in the library, just over 27% of respondents agreed with this idea.
- Many suggestions were around health and wellbeing, such as Health and Mental Visitors, triage services, blood pressure service, local health and wellbeing groups.
- Other ideas included Job Centre and Citizens Advice.

Increasing Membership, Participation and Engagement in the Library Services

- When asked what other possible events and activities the library space could be used for, respondents selected from multiple options. Craft activities and local history talks were slightly most popular. Other ideas included 'a community café area' and 'groups for children

- aged 5-11 years old to encourage a love of reading in younger children’.
- Only a small number of respondents said they would be interested in volunteering at the library or be part of a community group to run events at the library.
 - When asked if anything else could improve the library experience, some commented that the proposed location would be ‘*closer to Town*’ and may offer ‘*better engagement with local primary schools*’.
 - Negative comments mainly focussed on the attachment to the existing building and location.

Conclusion

- 4.14 The level of response to the consultation exercise was very low, despite attempts to engage the local community, including non-users. It is acknowledged that the level of positive engagement that the Town Deal public consultation received, which included discussion about the library, may have resulted in the low response rate. No statistical significance can therefore be applied to the results so qualitative interpretation is an important element of presenting a conclusion and suggested next steps.
- 4.15 Notably, the consultation exercise was launched in advance of the Council’s serious budget challenges being known and there is a clear need to ensure ‘next steps’ are considered within this context.
- 4.16 Relocation – views appear to focus on related issues such as the re-use of the existing building, availability of parking and accessibility rather than the principle of relocation itself. The Council has successfully relocated other libraries recently and so the principle is an established element of the strategic approach to library management; an example is Killamarsh Library which is now co-located with a leisure centre and enjoying significantly increased footfall.
- 4.17 New buildings – and even modifications to existing buildings – are required to meet modern construction standards and be compliant with disability legislation in terms of accessibility and so concerns regarding access would be addressed through this process. The availability of convenient car parking remains an emotive issue and it’s clear that consultation responses vary in this regard. Whilst Staveley library has access to parking within the curtilage of the building, the proposed location in the heart of the town centre would not only increase the visibility of the service but provides improved access via public transport (an important element of the Council’s sustainable travel programme) and Morrison’s car park provides free facilities in close proximity. At Clay Cross, new and improved car parking in the vicinity of the adult

education building is a key part of the masterplan. The Equality Impact Assessment (EIA) at Appendix 4 provides information on the relevant issues and their mitigation.

- 4.18 Some helpful comments were received regarding the use of the buildings and the services offered, along with opportunities for increasing patronage. These will be taken forward and included in the new Library Strategy, and specifically, any service re-design at Clay Cross and Staveley should the proposed relocations go ahead.
- 4.19 It is noted that community capacity and volunteering does not seem to be available to any great extent, however a more visible service in the right location may in fact, encourage current non-users to become more involved in their library facility.

Implications for Derbyshire County Council (DCC)

- 4.20 Appendix 1 sets out the various considerations that need to be applied to proposals such as the potential relocation of library provision to a different building. In summary however, the key considerations that need to be balanced are:
- Finance: The two Town Deals provide an opportunity for DCC to access grant funding that would be used to support improvements to the physical buildings/ new buildings - and potentially improve the range of library services on offer. Modern buildings typically are more energy efficient and there is a further opportunity, through relocation, to reduce some of the controllable elements of spend (utility bills etc); a move to alternative premises could present the Council with revenue savings over the longer term. However, the shape and scale of these potential savings aren't yet fully understood as more detailed building design is required by the respective borough councils before actual running costs can be confirmed. In addition, the 'fit out' costs and removal costs – and their source of funding - also needs to be understood before any final commitment can be given to relocation. Typically, revenue costs aren't included in Town Deal grants so it is important the Council reserves its position.
 - Supporting regeneration ambitions: DCC is keen to play a strong and facilitative role in supporting the regeneration ambitions of district councils and this is reflected in our Market Towns Regeneration Pipeline. Key benefits of the masterplans for both Staveley and Clay Cross include improved public realm, improved access to sustainable travel and transport and the revitalisation of old town centres to increase footfall and facilitate wider socio-economic benefits. Library facilities based on the heart of these areas would benefit from increased visibility and complementary footfall.

- Other issues: such as ability to rationalise existing physical Council assets, subject to leases, disposals etc being satisfactorily addressed. Clawback liabilities connected with the acceptance and use of Town Fund monies - and whether there are any potential implications for the County Council should any aspect of the proposals affecting DCC property or projects not proceed fully or only have limited time in implementation.

Concluding Comments

- 4.21 None of the above issues are insurmountable and the detailed design and costing process that needs to take place as part of the next stage of project development will seek to clarify and resolve them. Having regard to the consultation responses and in balancing other considerations, approval is sought through this report to support the 'in principle' relocation Staveley Library (noting that Clay Cross library relocation received in principle approval in December 2022) and the progressing of detailed work to confirm the full costs of relocation, prior to a final decision being made by the Council.
- 4.22 Comments relating to using buildings more effectively and increasing membership, participation and engagement in the library services will be noted during any relocation should the proposals go ahead.

5. Consultation

- 5.1 Public consultation on the proposed relocation of both libraries took place between 30 June and 22 September 2023. To ensure the consultation was accessible to all, a combination of paper and online questionnaires was used.
- 5.2 Response levels were low - 18 responses were received for Clay Cross and 70 responses for Staveley – and section 4 of this report provides a summary. Appendices 2 and 3 provide a more detailed analysis of the results.

6. Alternative Options Considered

- 6.1 Option 1: Do nothing - This option would result in the two libraries remaining in their existing buildings. The opportunities to secure improvements to the physical buildings – and potentially to service delivery – would not be achieved. Also, the opportunity to secure reductions in running costs would also be lost. North East Derbyshire District Council (NEDDC) and Chesterfield Borough Council (CBC) would not be able to fully implement their Town Investment Plan and would not maximise the opportunities presented by the Town Deal

funding. As such, the residents of Clay Cross and Staveley would not be best served.

- 6.2 Option 2: The refurbishment of the existing Clay Cross and Staveley Libraries - This option is not considered viable for the foreseeable future due to Council's current budgetary challenges and the level of investment that would be required to address the backlog of maintenance on the buildings, particularly at Staveley Library. In addition, both libraries perform very poorly in terms of energy consumption so significant investment would be required to reduce the carbon footprint of each building. Clay Cross library is prone to vandalism and, although anti-vandalism measures have been put in place, due to its location in a public park, the building is still considered vulnerable. Relocation and co-location with other services of mutual opportunities for increased footfall and enhanced service to customer. The refurbishment of existing buildings does not offer this opportunity and therefore is not considered appropriate.

7. Implications

- 7.1 Appendix 1 sets out the relevant implications considered in the preparation of the report.

8. Background Papers

- 8.1 Cabinet Member – Clean Growth and Regeneration report, Clay Cross Town Deal Outline Business Case 21 December 2022 D635 (CGR)
- 8.2 Cabinet report, Proposals to Consult on the Potential Relocation of Clay Cross and Staveley Libraries 15 June 2023, Minute No. 86/23 refers)

9 Appendices

- 9.1 Appendix 1 – Implications.
- 9.2 Appendix 2- Clay Cross Library Consultation Analysis.
- 9.3 Appendix 3 – Staveley Library Consultation Analysis.
- 9.4 Appendix 4 - Equality Impact Assessment.
- 9.5 Exempt Appendix 5

10 Recommendations

That Cabinet:

- a) Notes and accepts the results of public consultation on the opportunities presented by the Town Deal programmes in Staveley and Clay Cross which support the Council's wider ambitions to deliver high quality, value for money services and aid delivery of Council Plan priorities regarding Library Services.
- b) Approves 'in principle support' for the proposal to relocate Staveley library service into a new building (Building 21) within the heart of Staveley town centre.
- c) Notes and accepts the potential implications of specific town deal proposals for Derbyshire County Council services and assets (section 4 and Appendix 1 of the report refer) in supporting the wider regeneration ambitions for Clay Cross and Staveley.
- d) Approves that work, in partnership with Chesterfield Borough Council and North East Derbyshire District Council, progresses at pace to finalise detailed designs and both capital and revenue costings as part of the next steps of project development, ensuring that the full cost of relocation and occupation of new buildings is understood and approves that relocation will not be supported unless such costs are either the same or lower than existing costs of the library service at these locations.
- e) Agrees to further reports being presented for final consideration once the full cost of proposals is understood.

11 Reasons for Recommendations

- 11.1 Relocation of Clay Cross and Staveley Libraries would maximise the opportunities presented by the Town Deal Funding. As such, the residents of Clay Cross and Staveley would be best served.

12 Is it necessary to waive the call in period?

12.1 No.

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details:

Implications

Financial

- 1.1 The Council is currently working to address significant budgetary challenges. Accessing opportunities to help improve the standard of library buildings and achieve efficiencies in running costs is a welcomed approach to service delivery. The two town deals at Staveley and Clay Cross represent such an opportunity.
- 1.2 Detailed work is being undertaken working closely with Corporate Property, to understand the full, current running costs of both libraries and these are set out in Exempt Appendix 5. In helping ensure the Council addresses its budget challenges, it is imperative that the running costs of the new buildings are equal to, or lower than, the current running costs. This needs to include the costs of the new fixtures and fittings and the relocation of the service to the new buildings. Agreement to move will not take place until this has been confirmed.
- 1.3 Relocation presents potential further financial advantage in that the new buildings mean the Council would no longer need to find the funding to refurbish the current buildings and the planned maintenance programme would be positively impacted for some years. Exact figures for this are not known at the time of writing this report.

Legal

- 2.1 The Council undertook a period of consultation with the public and key stakeholders between 30 June and 22 September 2023. The manner of consultation was shaped by the Council's corporate consultation practice to ensure that input from service users and non-users is secured as far as possible and that all groups were provided with the best opportunities for input.
- 2.2 A further report regarding the assets will be required once the asset plans and recommendations are finalised.

Human Resources

- 3.1 Clay Cross library is open for 30 hours per week Monday-Saturday and employs 5 staff on a part time basis (1.62 FTE). Clay Cross library is open for 30 per week Monday – Saturday and employs 4 staff on a part time basis (1.62FTE). There are no proposed changes to the staffing structures as

part of this proposal but clearly, if the proposals go ahead, then the physical staff base of the library will change. In terms of distance from existing buildings, this is minimal and being located closer to the heart of town centres will aid sustainable travel options for staff.

- 3.2 Consultation with staff and trade unions where required on the implications of any proposals will be conducted in line with Council procedures.

Information Technology

- 4.1 If Clay Cross and Staveley Libraries relocate, the Council's Information Technology will be required at each site.

Equalities Impact

- 5.1 An Equality Impact Analysis has been carried out by the Library Service, the results of which are provided at Appendix 4. In summary, the main findings indicate that the proposals to relocate Clay Cross and Staveley Library could impact on people of all ages and a limited number of people with disabilities. Key issues that need to be addressed during relocation are:

- Libraries situated in different locations
- Accessibility for disabled users
- Parking
- Quiet areas

- 5.2 These can be offset by providing adequate parking, ensuring enough space for disabled access and quiet areas is included in plans, and using mobile shelving to create space when needed and seating areas being available.

Corporate objectives and priorities for change

- 6.1 The potential relocation of both libraries is in line with the principles of creating a green and prosperous economy in Derbyshire, and our more specific Regeneration Pipeline which includes market town renewal programmes.

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)

Property and Asset Management

- 7.1 Further information is provided in exempt Appendix 5.

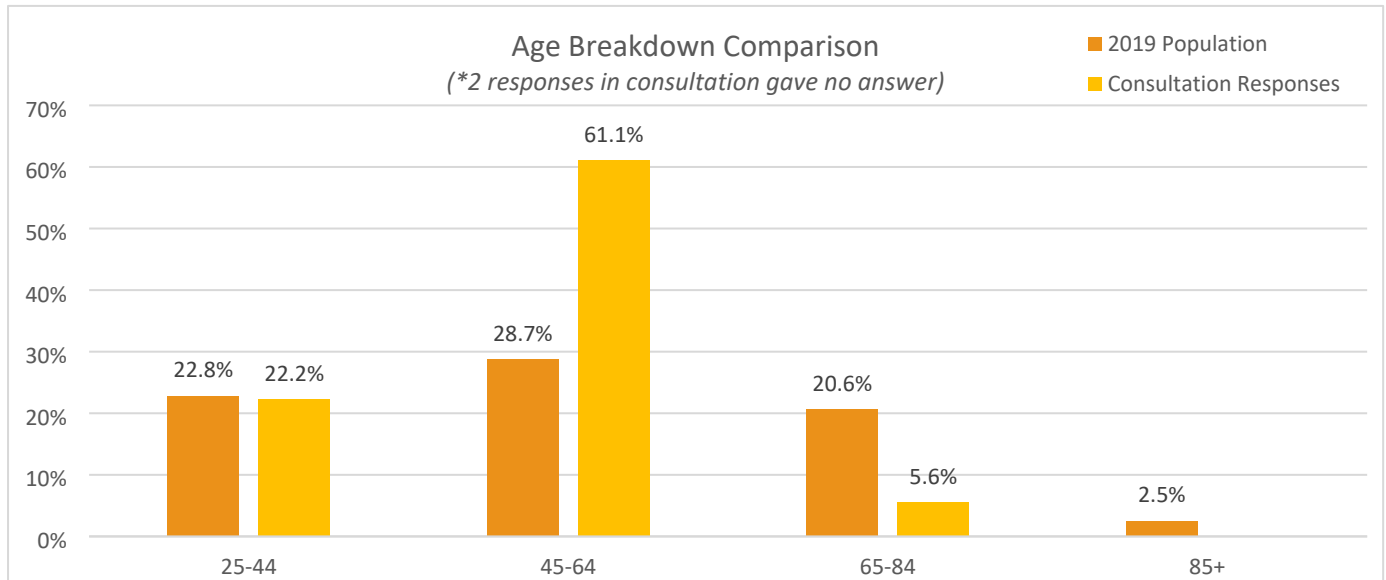
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Appendix 2

Clay Cross Library Consultation September 2023

Background

According to 2019 population estimates, the total population of Clay Cross was 25,361 (This is the combined figure of Clay Cross North & South). Of this 23.1% (5868 people) were over 65.



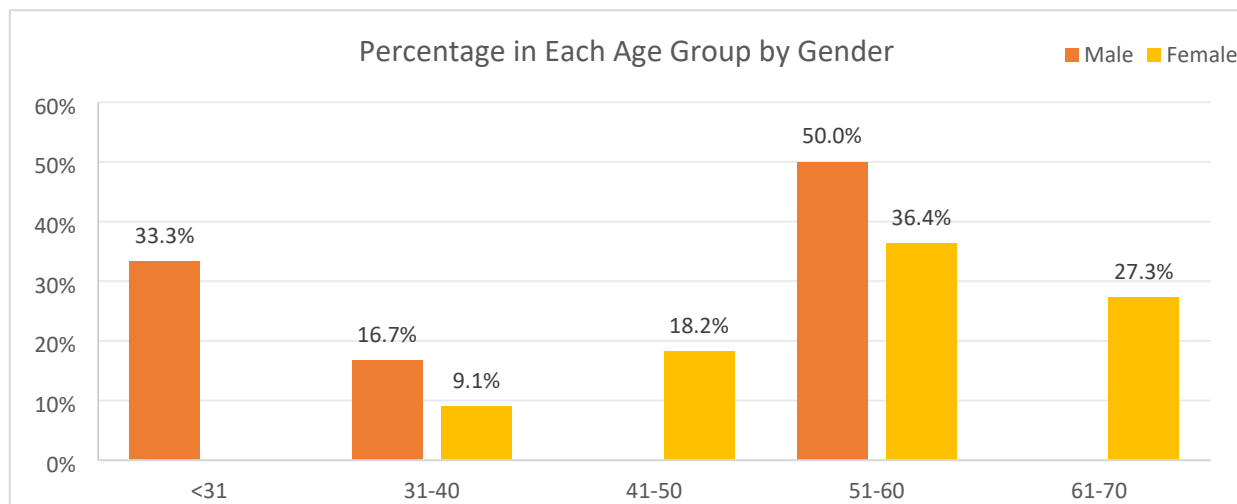
As a result of the consultation for Clay Cross library 18 responses were received, which equates to approximately 0.1% of the population. Of these 16 were library members.

As the consultation for Clay Cross library received just 18 responses in total. This means that any trends and patterns are limited due to smaller numbers. It also means that any breakdown by smaller groups is less relevant as the small proportions are even more significant.

One third of respondents were male (33.3%) with 1 response not specifying, and of those that stated over 58% were over 50 and 17% were over 60 – there was one response who left this question blank.

Average age of all respondents is 50.3 years but is noticeably higher for female respondents at 55.8 compared to males at 41.3. This is partially due to just over 50% (3 of 6) of males are 40 or under compared to 9% (1 of 11) of females.

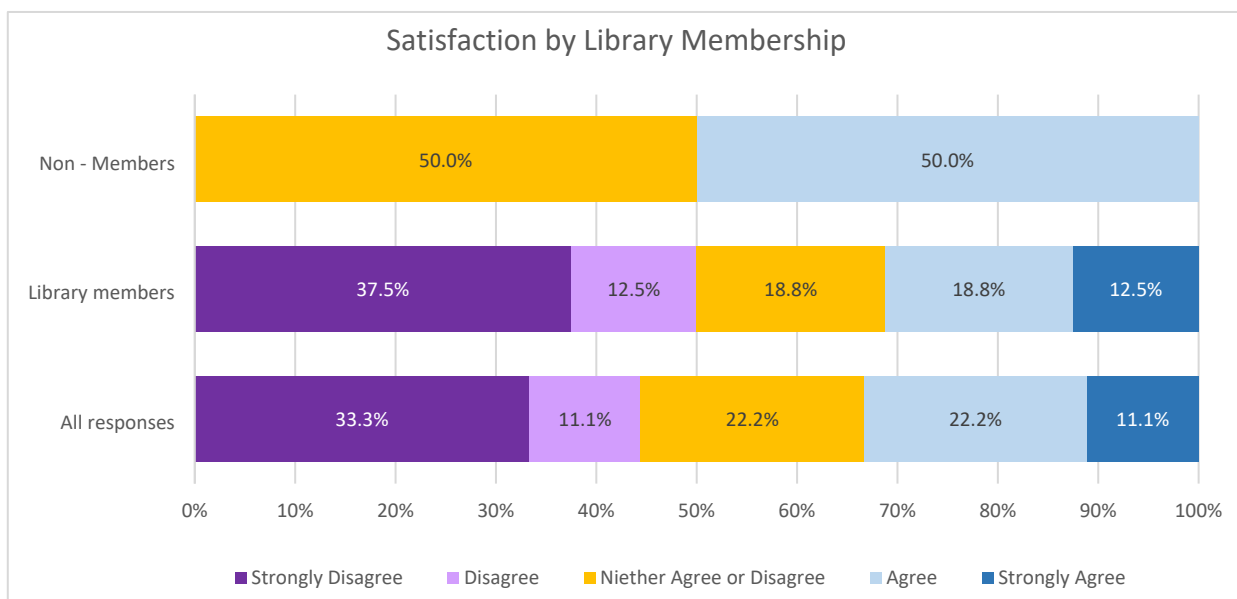
With the exception of one person who didn't specify, all respondents gave their ethnicity as 'White English, Welsh, Scottish, Northern Irish or British'.



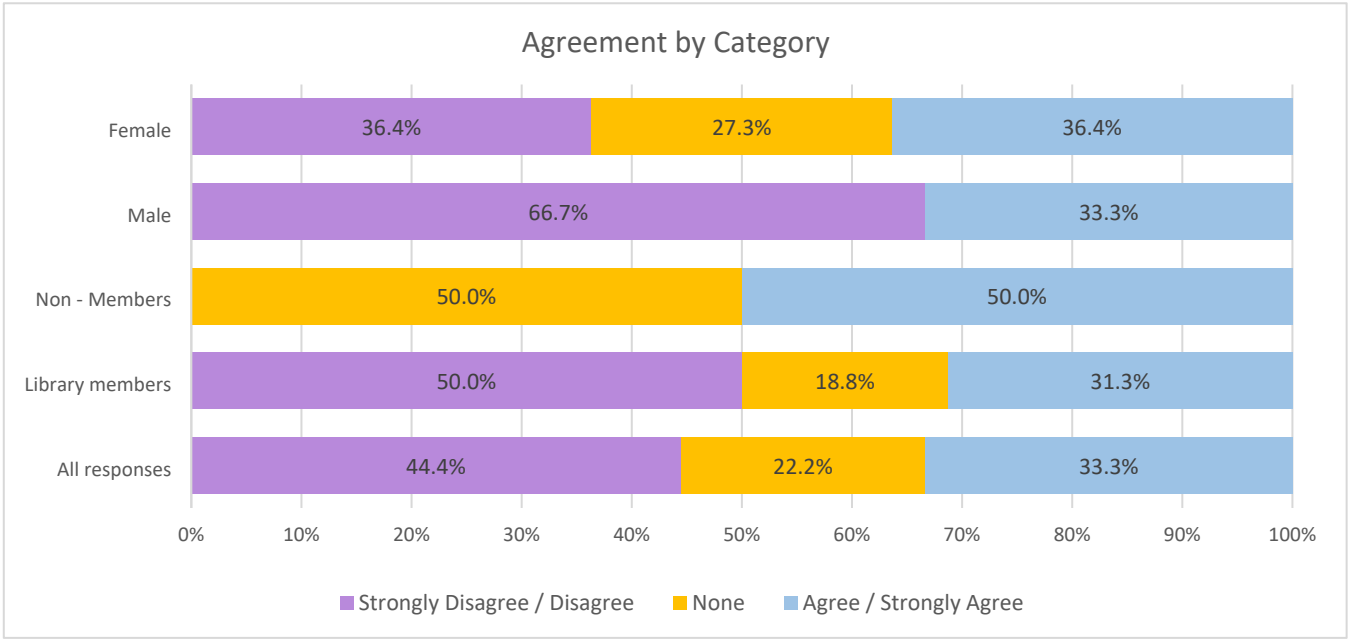
Overall

For all respondents to the consultation, 44% either Disagreed or Strongly Disagreed with the proposal to relocate the library. This compares to 33% who Agreed or Strongly Agree.

Not unexpectedly given the number of non-members who responded, the percentage of members agreeing or strongly agreeing with the proposal is in line with that of the overall number of responses



Looking at the data further, it shows that males are more likely to object with the proposals than females with 67% of males stating they disagree or strongly disagree compared to 36% of females.



Relocation Issues

Context

Users could give multiple answers to the question of relocation difficulties, so there were 31 responses in total from 18 surveys. Of these 28 came from library members and 16 from people who disagreed or strongly disagreed with the proposal. There were also 6 responses from people with disabilities and 19 responses from females compared to 11 from males

When asked about the library relocation 39% of replies expressed a concern about parking, this a consistent percentage between those who agree / strongly agree and those that disagree / strongly disagree with the proposal.

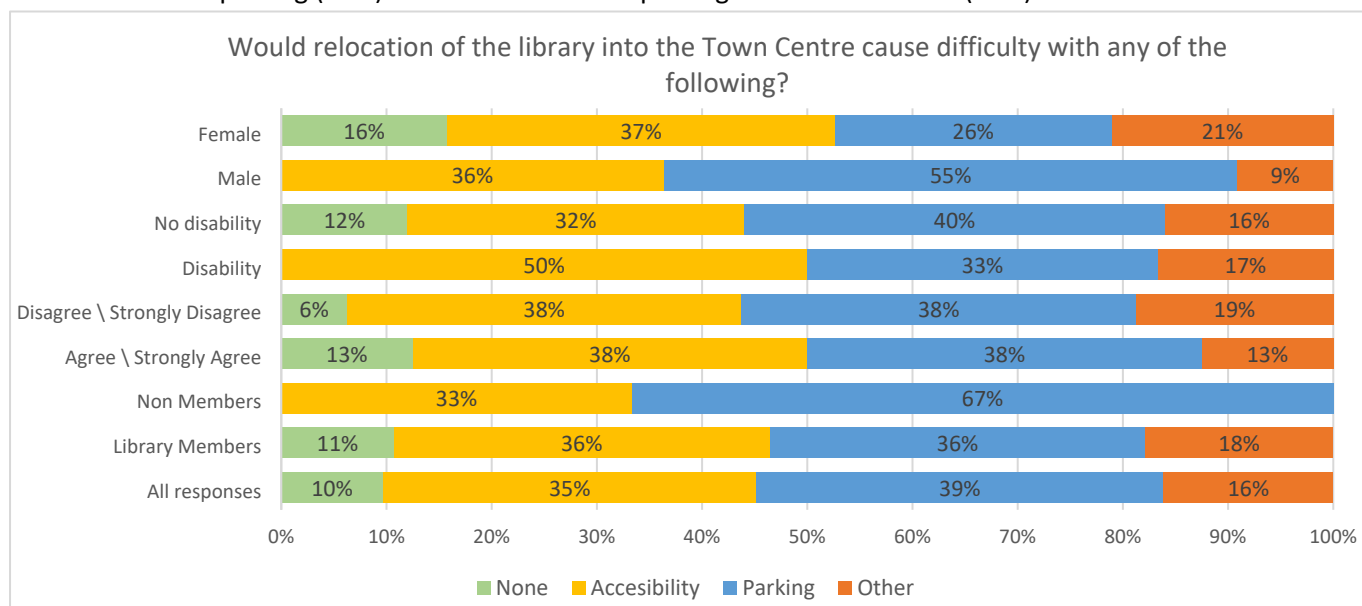
Accessibility is also shown to be a similar issue with 35% of all respondents expressing it as a concern. The figure is also similar for those who disagree or strongly disagree and those who agree or strongly disagree with 38% of both categories highlighting it as an issue.

The group with the highest percentage of respondents selecting accessibility is for those with a disability. With 50% of those selecting it as a difficulty with relocation.

Very few of the respondents to the survey said there were no issues with only 10% of people selecting the option.

Looking at the issue further by cross referencing some of the demographics, it shows that people with a disability are more concerned with accessibility with 50% expressing a concern whereas those without a disability are more concerned with parking (40%) whereas accessibility is only 32%.

Also interesting to note is that female respondents were more like to have no issues (16%) and were also less concerned about parking (26%) than Males who had parking as their main issue (55%).



Throughout all those surveyed there were 5 responses of other where a comment was left- these were as follows:

“Essential 'librariness'”

“Clay Cross is "Clay Cross" because it still holds on to the beauty of a by gone age. A lovely separate building that is "our" library. Not part of something else in another building! We don't want it left to rot with age, should it become empty or even worse - be knocked down. As the old saying goes "if it ain't broke, don't fix it!"”

“Further away for me”

“Library is currently in an ideal location for disabled access children and Holmgate locality. There is plenty of parking both across road and in park area although this needs upgrading.”

“Enjoyment of surroundings / environment”

Library Usage

Given users could provide multiple answers to this question, there were 52 responses in total from 18 respondents with most people choosing multiple options. Perhaps unsurprisingly the majority of respondents use the library to Borrow or return books with 31% of people giving this option. Of the other options provided, Reading and Leisure where the other most popular answers with 11% each, though all of the answers provided received some responses. For library members, the responses for Borrow / Return books increased to 33% - there were no responses with this answer for non-members. The answers provided by non-members were for leisure, to use the computers and to look for work / job applications.

6% of respondents added 'Other' as an answer, and of those there were 3 comments left- all from library members and these are listed below.

"Browsing, please, local information"

"Attend exhibitions of art"

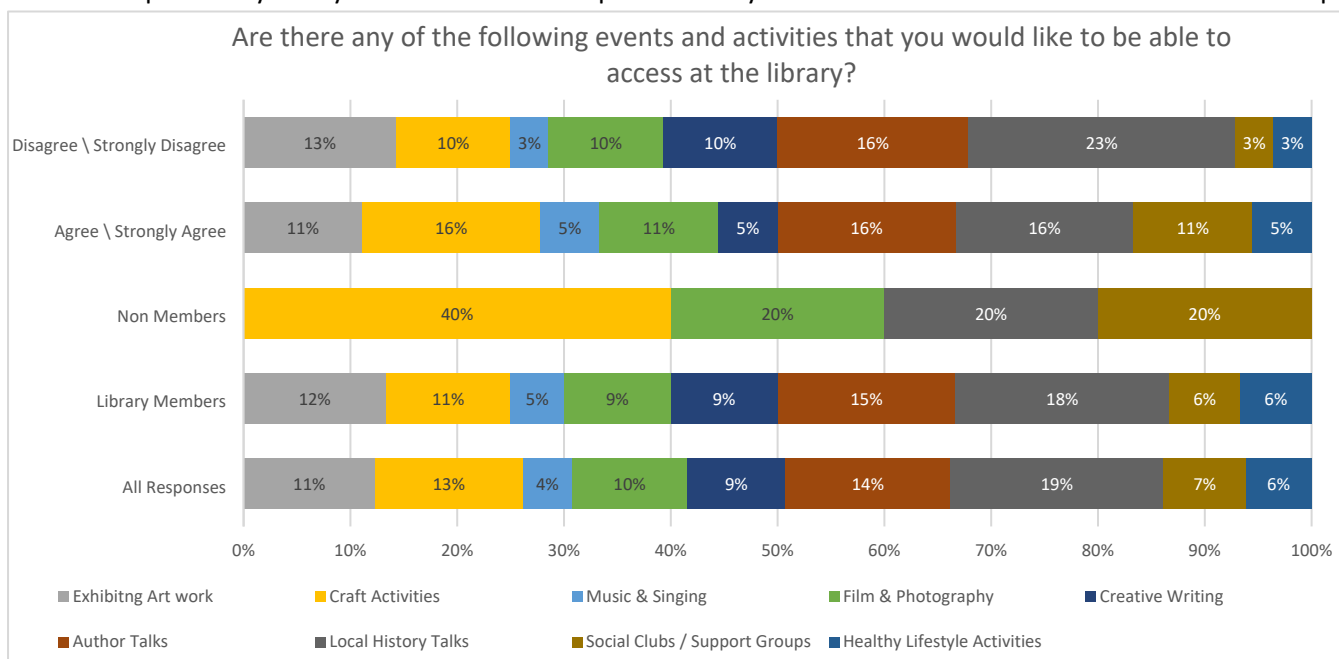
"It is a library not a social centre - we have one of those. Anything to do with literacy is fine but don't muddy the waters trying to be all things"

Other Possible Events and Activities

As with the previous question, this was another where people could fill in multiple responses, and in this case, there were 70 responses in total from the 19 surveys. Of these 65 came from library members, 19 from those who agree or strongly agree and 31 from those who disagree or strongly disagree with the proposal.

From the results all activities / events received some selections, with Local History talks being slightly more popular ahead of Author Talks, though Exhibiting Artwork and Craft Activities also received a number of responses.

From the chart below there appears to be a significant response from non-members for craft activities but as mentioned previously – only 2 non-members completed surveys so its difficult to assess to much from their responses



There was also an opportunity to respond with 'Other' and leave a comment. There were 5 people who did so – all library members and 3 of which answered 'disagree or strongly disagree,' to the proposals. The comments provided are below

"More children's activities and engagement with local schools"

"Book displays"

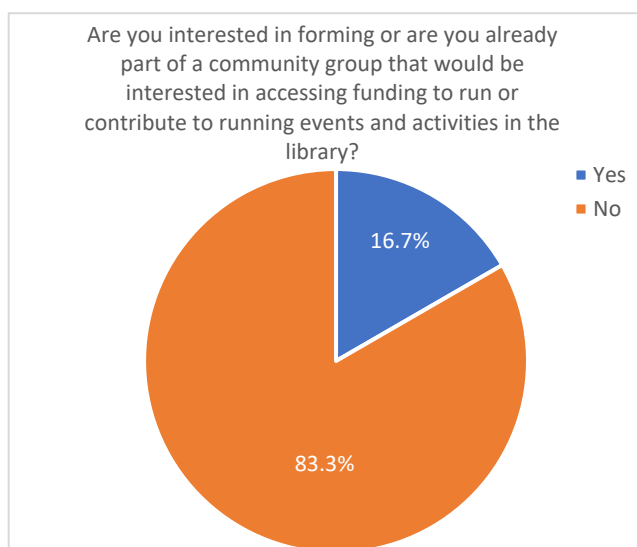
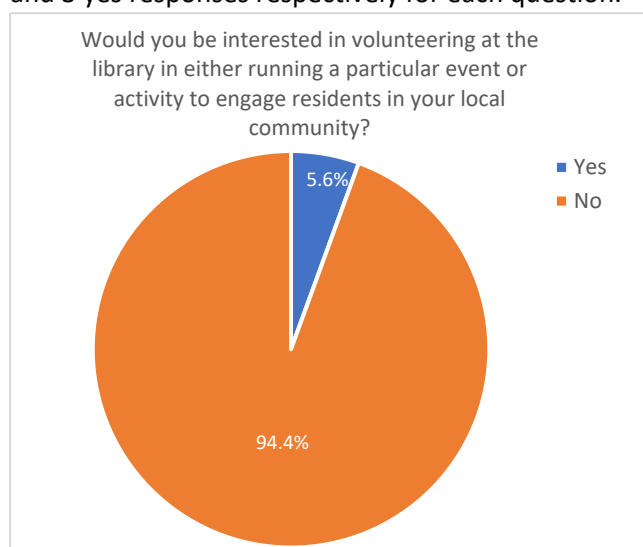
"Book club, more children's clubs to involve different age groups in book related activity e.g. Harry Potter clubs/Jacqueline Wilson clubs"

"It is a library - not to be used for music, crafts. It is for literacy. Some new books would be good."

Interested in Volunteering / Community Groups

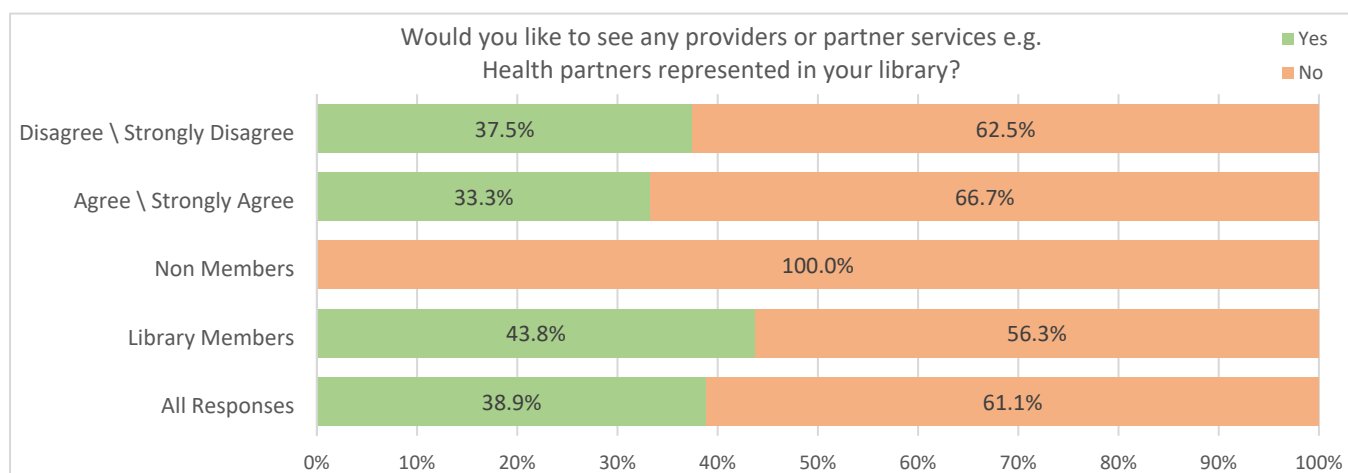
Of all the respondents to these questions, there were disappointingly only a small number who replied positively to say that they would be interested in volunteering at the library or to be part of a community group to run events at the library.

For these questions there are too few yes responses to break down the results by different groups as there only 1 and 3 yes responses respectively for each question.



Other Options

When asked if they would like providers or partner services represented in the library, nearly 40% of respondents agreed with this. Most of the different categories noted had similar responses with the percentage of 'Yes' responses to this ranging from 33% to 44%. The exception is non-members – but that was received from only 2 surveys so is an extremely small sample size.



As part of this question, there were a selection of comments included in the responses. the comments are listed below although 11 out of the 18 responses didn't make any comment:

"any joint working is a great idea, all the schemes come round again sure-start had play, reading, rhyming and singing sessions where midwives attended & breast feeding groups."

"Job Centre Social Services Health"

"Yes"

"Any, if it generated income for new books/resources"

"No - It is a library not a health centre!"

"Involvement of health providers/partners to assist support groups benefiting people who feel they are overlooked or don't get chance to talk with others in same situation."

"IT workshops & problem solving"

Anything else that could improve the library experience

Respondents were given a free text option to comment if there was anything else that could improve their library experience and the comments are below separated by their response as to if they agree with the proposal or not. The vast majority of these comments were made by people who were library members. The one comment made by a non-member is indicated in the table below.

Positive comments include being closer to town and convenience. There were also comments about things that could be done to better utilise the space and encourage more people to use it

Negative comments mainly focus on the attachment to the existing building and limited range of books

Agree	Opening hours extended on some evenings plus Saturday opening, wider choice of books, magazines, rgds audiophile etc. Wider variety of higher level educational books especially university level study books for students.
	I would agree there is a case for relocating this library more centrally as it is in an awkward place for car access and out of the way, and is architecturally unappealing (rather too obviously subject to criminal behaviour) However, having experienced the profound disappointment of the Killamarsh move I would be concerned about the same thing happening, cramming books into a dingy afterthought of a space which no one could feel proud of, doesn't encourage people to use it and makes me miss the old building (a surprise!)
	adequate free car parking (<i>non-member</i>)
	Open at least one evening.
Neither	Library's going into schools more & engaging with young children's, stronger links with schools for reading time, more activities and crafts. put on extra sessions throughout summer to engage with young people for reading, rhyming, storytelling and crafts which all seem to stop in summer when parents really need low cost or free activities.
	Poetry open mic
Disagree	Good opening hours; room hire opportunities, good staff levels
Strongly Disagree	Not moving it from it's current location
	I do not think it should be moved from it's current location. It is a lovely library in a good situation.
	The library should remain at this location. I have been coming to this library for over 50yrs on and off. Moving it will not enhance my library experience. Such a nice location and so convenient for me. What is the point of moving it?
	The choice of new fiction is very limited although books can be ordered. However it can take several weeks for the new titles to arrive.
	A library experience is helped by the knowledge of staff. More copies of new books so you don't have to wait weeks when you order books.

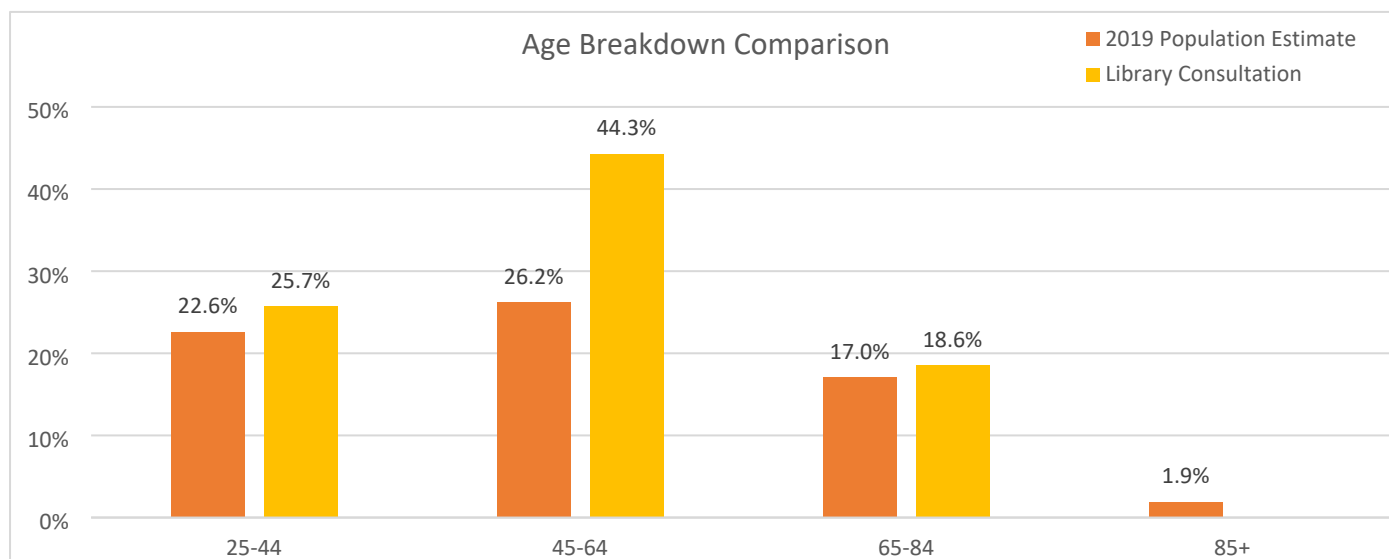
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Appendix 3

Staveley Library Consultation September 2023

Background

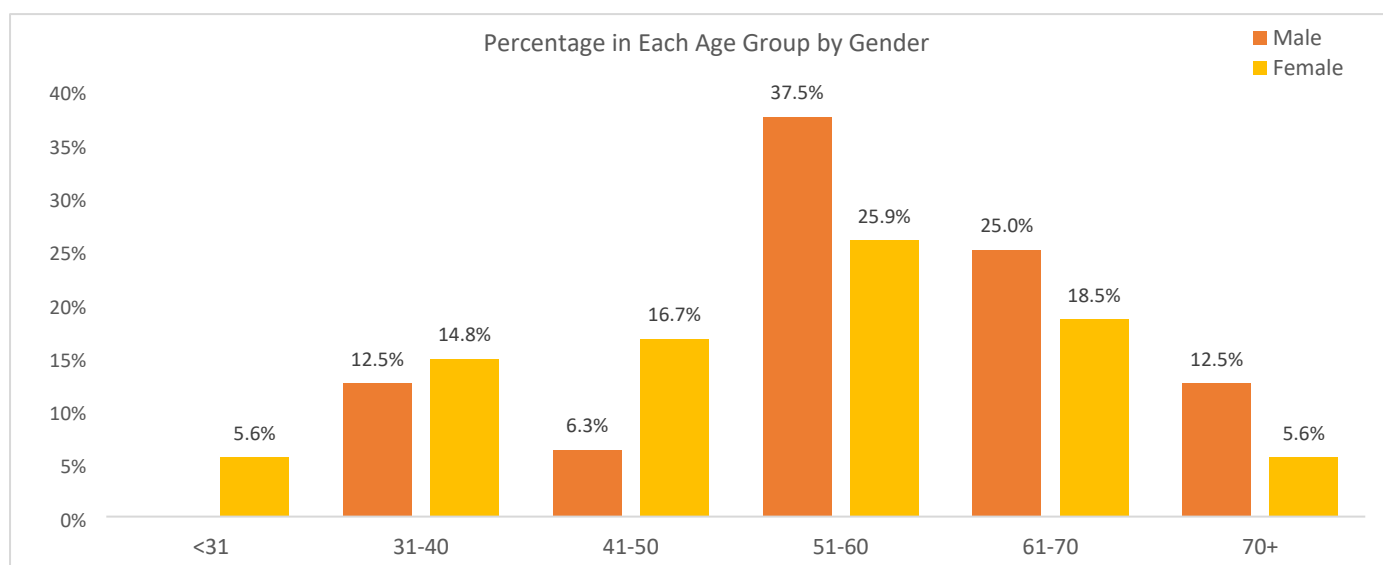
According to 2019 population estimates, the total population of Staveley was 12,693. Of this 18.9% (2409 people) were over 65. *(This is based on the data for the area of Staveley and doesn't include the part within Staveley North & Whittington)*



As a result of the consultation for Staveley library 70 responses were received. Of these, over 85% of those who replied said were library members.

Approx ¾ of respondents were female (77.1%) and of those that stated 56% were over 50 and just over 27% were over 60.

The average age of all respondents is 53.1 years. This figure is slightly lower for females (51.5) compared to males (57.3). This is in part because just over 20% of females are 40 or under compared to 12.5% of males. (2 out of 16)

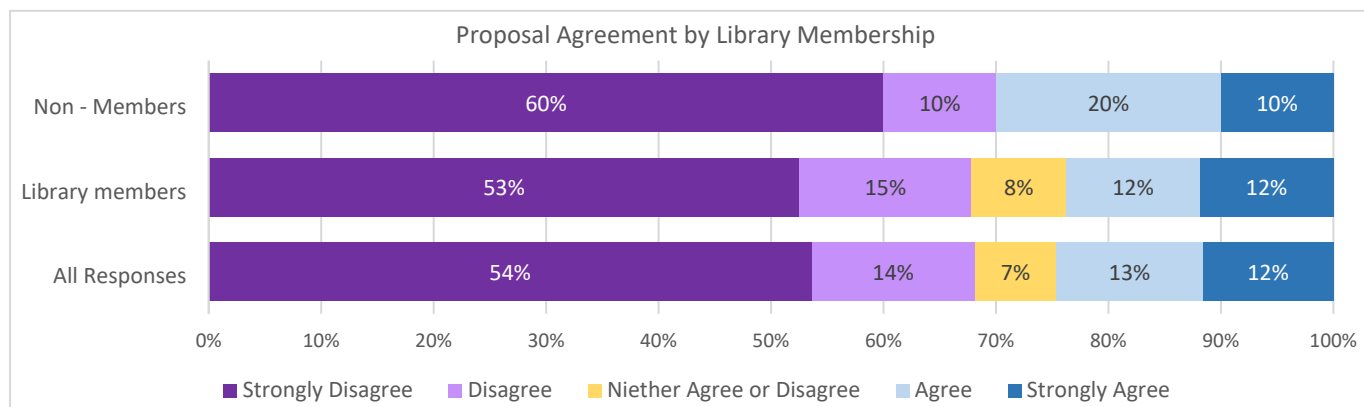


With a handful of exceptions, the vast majority (91%) were 'White English, Welsh, Scottish, Northern Irish or British' and. This figure is not dissimilar to the overall ethnicity breakdown for Staveley where approximately 3% of the population classed themselves as not White British.

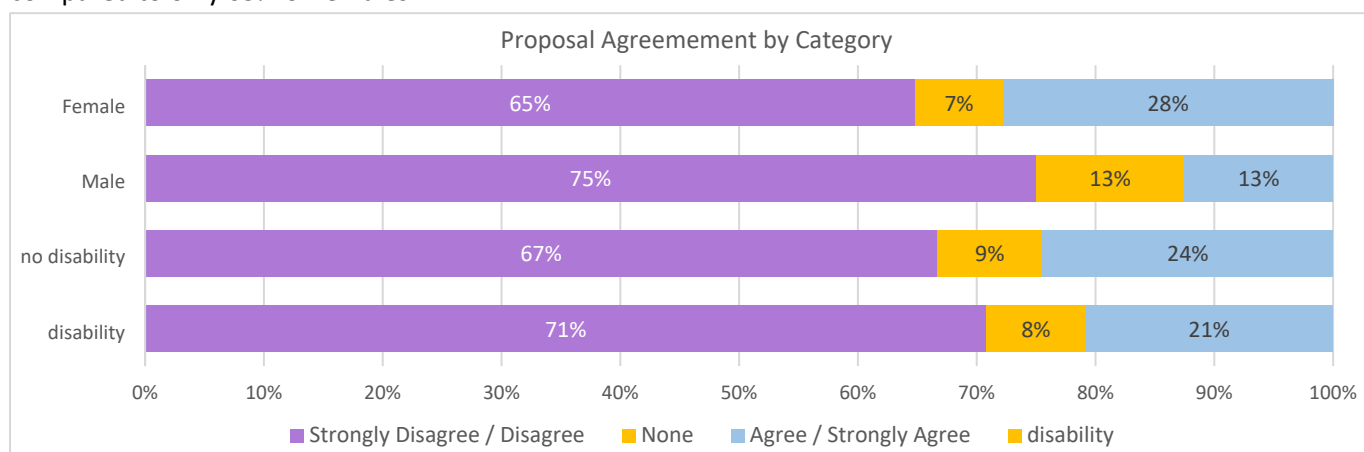
Overall

For all respondents to the consultation, 67% either Disagreed or Strongly Disagreed with the proposal to relocate the library. This compares to 24% who Agreed or Strongly Agree.

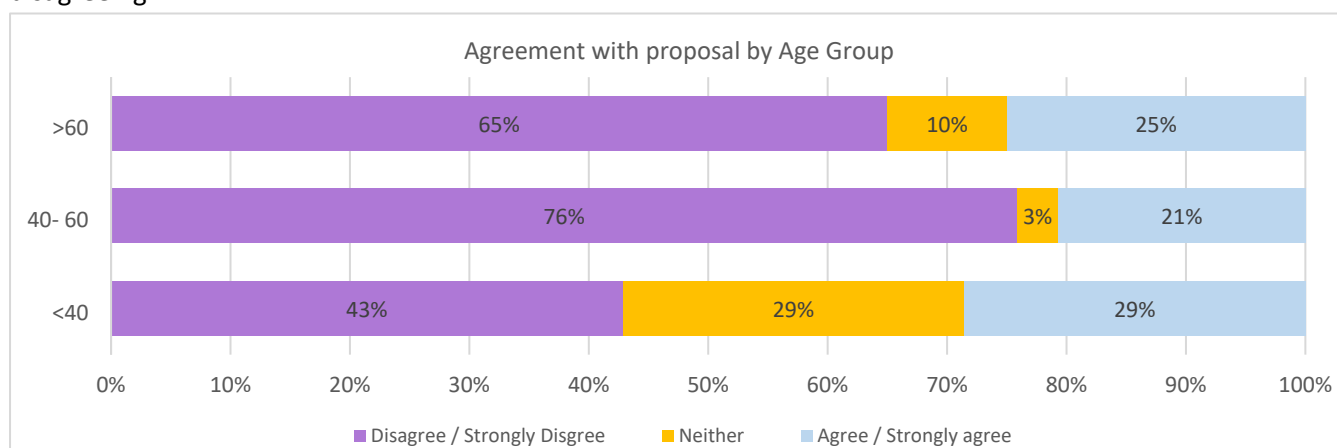
Overall, the proportion of library members who disagreed or strongly disagreed with the proposal is similar to that for non-library members (67% - 70%). Non-members are slightly more likely to Strongly Disagree (60% to 52%) but also are more likely to agree or strongly agree (30% to 23%). However, the proviso with this is that there were 59 library members who replied compared to 10 non-members – so there are limitations when considering the non-member data



Looking at the responses in more detail and considering some of the other demographic data available. From this it appears that females are more likely to agree with 28% of females compared to only 13% of males saying they agree or strongly agree with the proposal. This compares to 75% of males who agree or Strongly Agree with the proposal compared to only 65% of females.



From an age perspective, those under 40 seem to have less strong opinions on the proposal than those in older age groups. With 50% neither agreeing or disagreeing compared to 20% or less in the other categories. Older age groups also seem more likely to disagree with the proposals with over 65% of each age group either disagreeing or strongly disagreeing.



Relocation Issues

Context

Users could give multiple answers to the question of relocation difficulties, so there were 88 responses in total from 70 surveys. Of these 75 came from library members and 63 from people who disagreed or strongly disagreed with the proposal. There were also 34 responses from people with disabilities and 66 responses from females compared to 22 from males

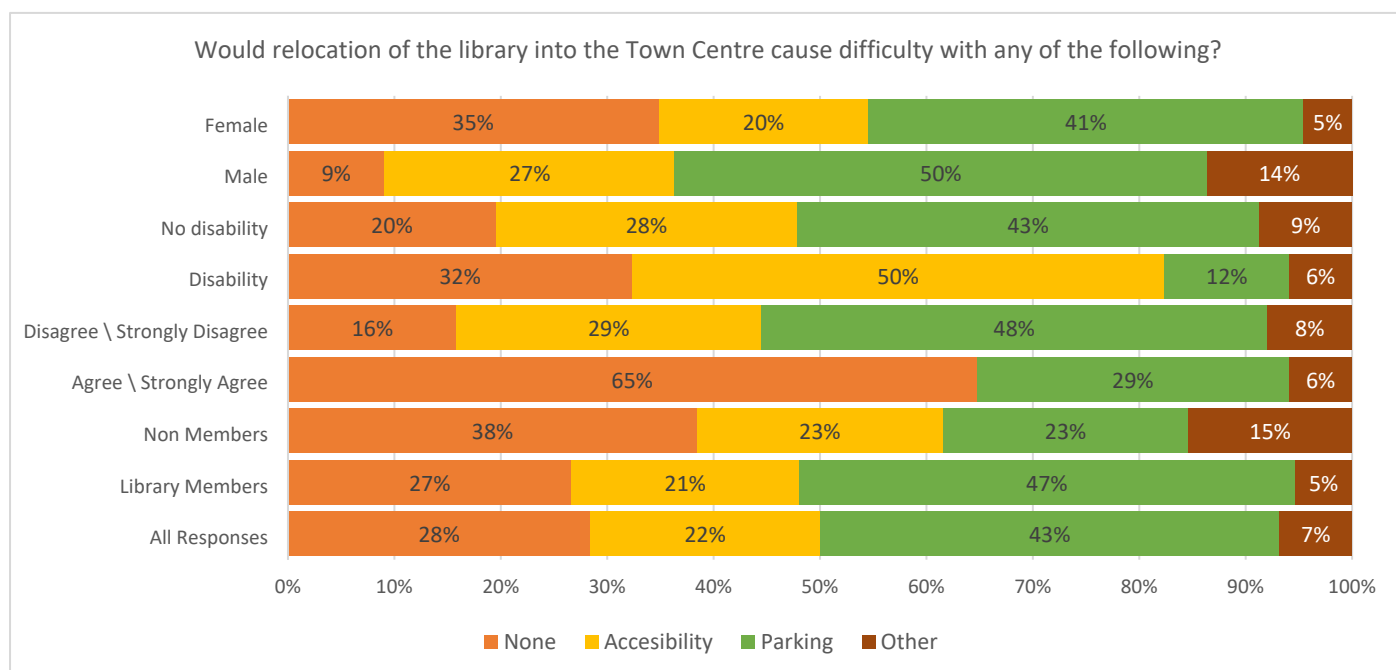
When asked about the library relocation nearly half of respondents (43%) expressed a concern about parking, though this reduces to only 29% for those that agree or strongly agree with the proposal.

Accessibility is less of an issue with 22% of all respondents and 29% of those who disagree or strongly disagree with the proposal expressing it as a concern.

For those that agree or strongly agree with the proposal nearly two thirds (65%) said there were no issues. However, this reduces to only 16% for those that disagree / strongly disagree.

Results for library members tend to follow the to the general pattern, with 47% raising the issue of parking and 21% mentioning accessibility. Non-members have less issues (38% said none)

Looking at the issue further by cross referencing some of the demographics, it shows that people with a disability are more concerned with accessibility with 50% expressing a concern whereas those with no disability are more concerned with parking (43%). Also, a third of females had no issues with the proposal compared to 1 in 10 males.



Only six responses added other as an option and those comments mentioned issues around Safety, anti-social behaviour and that the current location is quiet and has a nice atmosphere some of the comments are below

“Currently the library is in a quiet location ideally suited for it's needs not a busy town centre shopping area with all associated noises and distractions.”

“Staveley Library is one of the best in the county in terms of atmosphere and is a genuinely uplifting place to be. Too many re-locations have resulted in provision which gives a strongly offputting message.”

“Need to make sure that the current library remains open unit the town deal building is built. Why can't we use the Staveley cinema site or redevelop the charity shop betting area of the Town.”

Library Usage

Given users could provide multiple answers to this question, there were 154 responses in total from 70 respondents with most people choosing multiple options. Perhaps unsurprisingly most respondents use the library to Borrow or return books with 38% of people giving this option. Of the other options provided, research (14%) was the next popular with Leisure, to read and to use the computers also getting a reasonable number of responses although all the possible options received at least 6 responses apart from 'look for work / job applications' which only had 1 Other options provided when answering other were to use the printer / photocopier, browsing, peace and to access the citizens advice service and a couple of further miscellaneous comments:

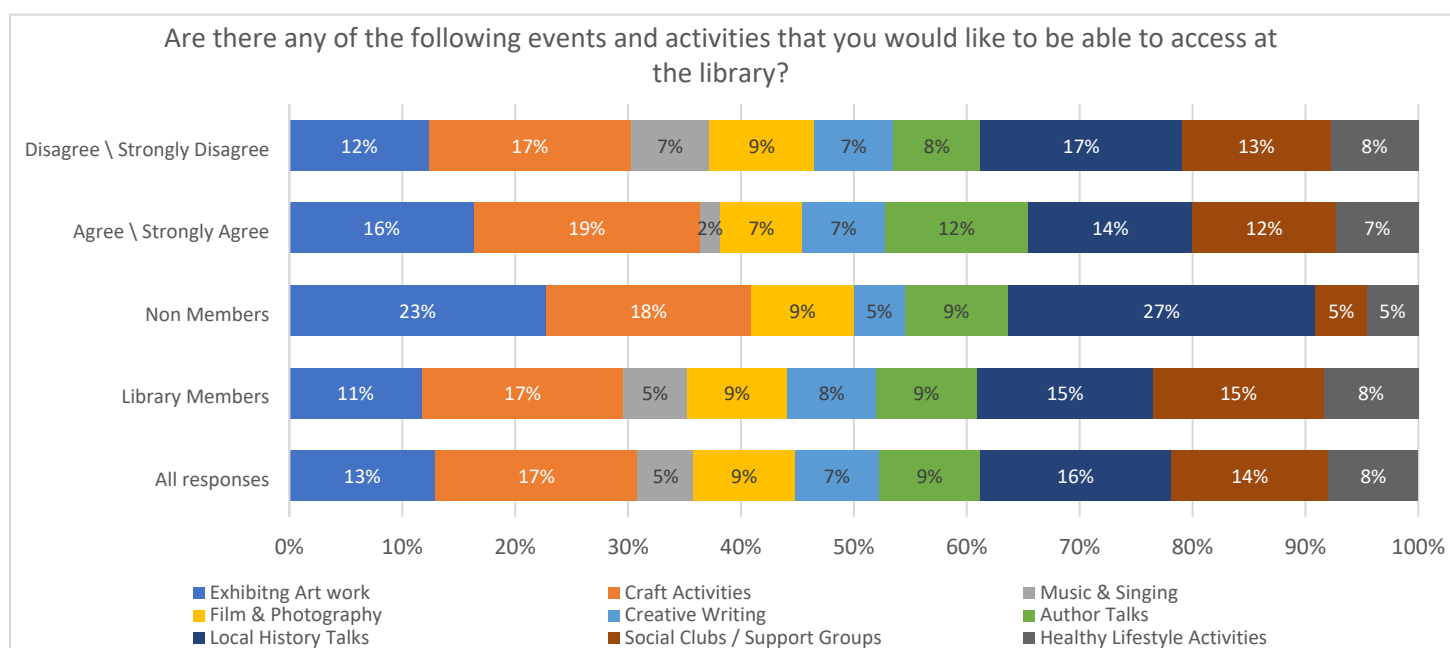
"I don't visit the library but know people who do"

"a beautiful building purpose built for a library service, years of neglect have made this a very expensive project to update."

Other Possible Events and Activities

As with the previous question, this was another where people could fill in multiple responses, and in this cases there were 207 responses in total from the 70 surveys. Of these 185 came from library members, 57 from those who agree or strongly agree and 133 from those who disagree or strongly disagree with the proposal.

From the results all activities / events received over 10 selections, with Craft Activities and Local History talks being slightly more popular.



There were also 6 responses of other – where the comments made were:

"Community cafe area would be nice"

"Groups for children age 5-11 years old. Perhaps short sessions over half terms, book club style? To encourage a love of reading in younger children."

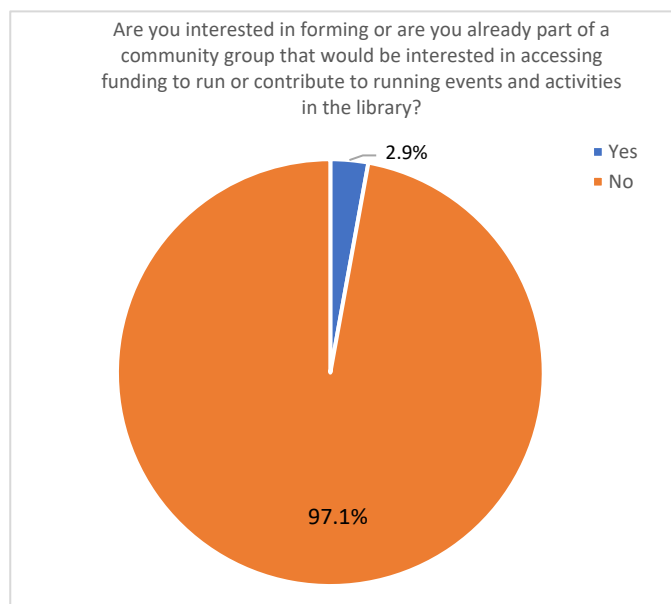
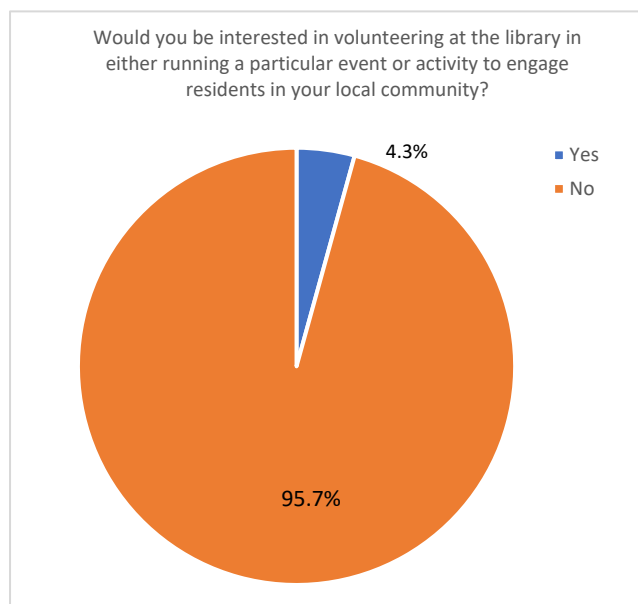
"All of these have at some time and still do take place in this library."

And 3 responses of "None", "None of the above" or "Na"

Interested in Volunteering / Community Groups

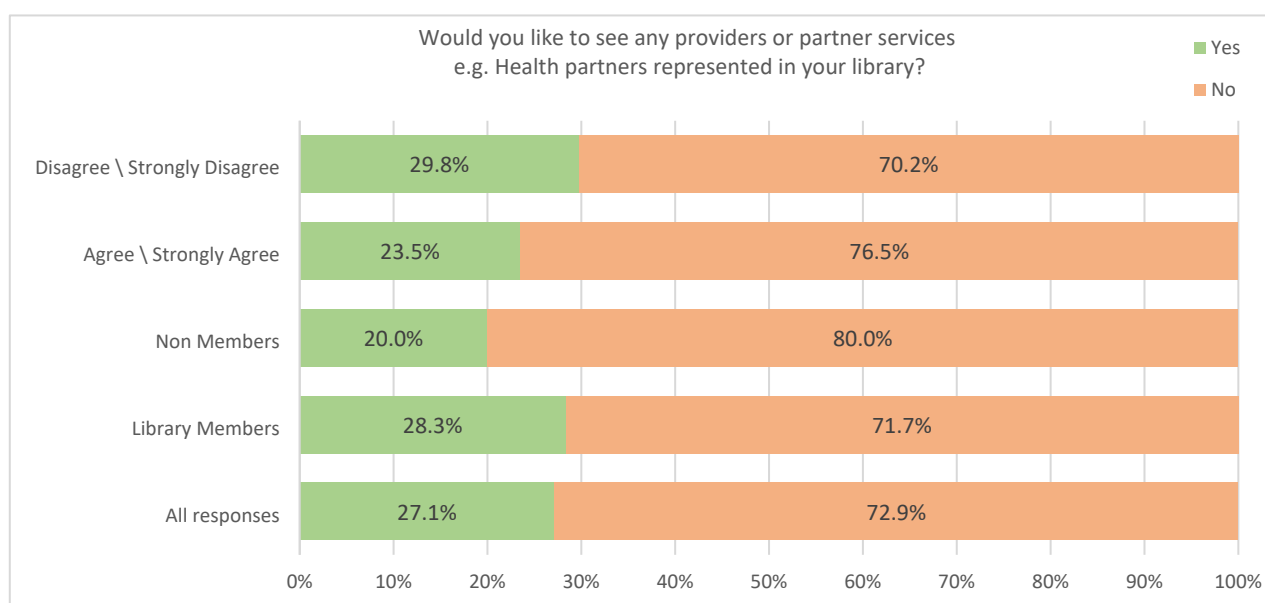
Of all the respondents to these questions, there were only a small number who replied positively to say that they would be interested in volunteering at the library or to be part of a community group to run events at the library.

For these questions there are too few yes responses to break down the results by different groups as there only 3 and 2 yes responses respectively for the questions.



Other Options

When asked if they would like providers or partner services represented in the library, just over 27% of respondents agreed with this. When broken down by different categories, they follow the pattern of the overall share – with 20% to 30% of people being in favour of having other providers / partners in the library with 75 – 80% against. The lowest percentage in favour is for non-members with 20%) whilst for those who disagree / strongly disagree the number goes up to nearly 30%.



As part of this question, there were a selection of comments included in the responses. The main suggestions were related to health & wellbeing services and citizens advice and unemployment advice– the comments are listed below although 51 out of the 70 responses didn't make any comment:

Health & Wellbeing

- Blood pressure and health advice
- Mental health. Help in a quiet place.
- Health visitors. Parent drop in groups.
- Triage services
- Having a walk in service for health checks(blood pressure etc) would help the community.
- Maybe groups about pain & illnesses e.g. fibromyalgia & M.E./ CFS
- It would be easier and quicker for general information on health issues
- midwives, breast feeding groups etc
- Access to blood pressure, advice on diet etc, encourage uptake of vaccinations in children and adults
- Local health and well-being groups such as the local gym, support groups for healthy living, and mental health support

Other

- Any, depending who can find time to be there, it would help the locals too
- Job Centre Health Social Services
- Unemployed workers
- citizens advice center
- Citizens advice

Anything else that could improve the library experience

Respondents were given a free text option to comment if there was anything else that could improve their library experience and the comments are below separated by their response as to if they agree with the proposal or not.

All comments were made by people who were library members. Those who were non-members didn't make any comments in answer to this question.

Positive comments include being closer to town and convenience. There were also comments about things that could be done to better utilise the space and encourage more people to use it

Negative comments mainly focus on the attachment to the existing building and location

Strongly Agree	Using the space to hold sessions to support teenagers in finding training, volunteering or employment opportunities
Agree	It's closer to Staveley town
	Increase the number of large print and spoken word materials.
	Better engagement with the local primary schools, perhaps offering set sessions for classes to come down and explore the library setting, could also encourage more sign ups and better use of the space - eg children encourage their parents to take them. During the winter months encourage the library to be used as a warm space, perhaps offering hot drinks to those who want to come and use the space to meet others, read, research etc.
Neither	I'm currently quite happy with the library. I understand why you might want to move it to a refurbished town centre but careful not to turn it into a noisy place where reading is not encouraged.
	Closer to town so wouldn't have to move the car if going in to town
Disagree	I would just like a guarantee that if Staveley Library building is sold, that the proceeds go back into the town and not into other areas
	Fix the leaks, make improvements to the building and windows in line with listed building it is a thing of beauty, respect and repair it.
	I appreciate the council has its eye on selling Staveley Library. However, this is shortsighted due to the development of the canal basin and the views from the library and more could be done to utilise this.
Strongly Disagree	Staveley Library is a fantastic building run by wonderful staff. To re-locate to the new proposed site would be a disaster on so many levels.
	Keep it where it is now!
	There is nothing to improve it is alright, its in a quite location so avoiding traffic, the staff are great .
	The library in its current format covers all my needs. The library where it is is perfectly accessible, it has a large selection of books, there are computers for people who require their use and friendly helpful staff should you need help or advice. This library was purpose built and is as relevant today as when it opened. We do not need to try to fix or improve something that doesn't need it.
	Nothing, the existing library is excellently placed and is great as it is.
	Leaving it where it is in the historic building with car park
	Keep it where it is
	Keeping the purpose built library OPEN
	More up to date books. In other words spending on books needs to be increased.
	This survey is about using Staveley money to relocate the existing library. Why are you asking about activities that can take place at our existing library? It's not relevant,

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Appendix 4

Equality Impact Analysis Record Form 2021 – Derbyshire County Council

Part 1. Introduction and context

Policy/ Service under development/ review		Proposals to consult on the potential relocation of Clay Cross and Staveley Libraries			
Department/ Enterprising Council Workstream		Place – Libraries and Heritage			
Lead officer/ Workstream Lead		Michelle Parker			
EIA Team:		Michelle Parker, Alison Bailey			
Date analysis commenced:	0/05/2023	Date completed:	13/12/2021	Date approved:	
Updated:	16/10/23		01/11/2023		
Aims/ objectives of the policy/ service?					
To provide access to high quality resources and services (physical and digital) promoting reading for pleasure, information and learning for people living, working or studying in Derbyshire.					
What outcomes will be achieved with the new or changing policy/ service?					
<ul style="list-style-type: none"> • Improve access to Council Services by locating different services within one building • Achieve cost efficiencies and savings as a result of co-locating services in one building • Maintain community's access to library services while paving the way for the redevelopment of the area where the library is currently situated • Increase take up use of library services by raising awareness of its services amongst new audiences / potential customers using the Sports Centre 					

Please list any associated policies, services, or functions?

- Vision Derbyshire – County Council and District Councils working together
- Enterprising Derbyshire – delivering high quality services while ensuring cost effectiveness & best value
- Thriving Communities – bringing services together for the benefit of communities and enabling redevelopment plans for area

Please list the main people or groups that this policy/ service is designed to benefit and any other stakeholder involvement?

- The local community within Clay Cross and Staveley – easier access to services in one place
- Derbyshire Libraries – maintaining library services to the community
- Derbyshire County Council – cost efficiency savings
- North East District Council – redevelop area
- Chesterfield Borough Council- redevelop area

Will the policy/ service and any changes impact on any other organisations such as community and voluntary sector groups?

There are no Community or Voluntary Groups that use Clay Cross Library. Derbyshire Unemployed workers voluntary Group use Staveley Library

Part 2. Supporting evidence

Please list and/ or link to below any recent and relevant consultation and engagement that can be used to demonstrate clear understanding of those with a legitimate interest in the policy/ service and the relevant findings:

- Staveley Masterplan Consultation which was undertaken in 2021
- Clay Cross- a period of extensive consultation with local residents and businesses, a number of projects were drawn up to support the regeneration ambitions of NEDDC and the Town Investment Plan

If there is insufficient consultation or engagement information, please explain what action is being taken to obtain this information and when this consultation/ engagement will be completed and available:

- DCC formal consultation July-Sept 2023.
- According to 2019 population estimates, the total population of Clay Cross was 25,361 (This is the combined figure of Clay Cross North &

South). Of this 12% were recorded as library users (3020 people) and 23.1% (5868 people) were over 65.

- Data from the Library Management System (active users, different ages, specific user groups, educational institutions/groups) – data will be used to analyse the library's current customer base to determine which groups may be affected by the proposed changes so mitigation measures can be put in place.

Please list or link to any relevant research, data or intelligence, Observatory or any other information that is available and will be used to help complete the analysis?

Data from the Library Management system shows:

As at 01.10.23 **Clay Cross** has 1,418 registered users of whom 1,099 are active users

An average of 54 users a month use the public PCs.

Breakdown of customers shows:

35% are adults

0.5% are from Home Library Service

10.9% are seniors

32.6% are under the age of 12

5.3% are teenagers aged 13-17

10.9% are Gold card users

0.2% are visually impaired and print denied

0.3% are B-line 18 cardholders

0.1% are students

2.6% are users on benefits

0.1% have a learning disability

0.1% are reader groups/bookclubs

0.2% are preschools/nurseries/child minders

1.3% are staff

As at 01.04.23 **Staveley** has 1,343 registered users of whom 985 are active users

An average of 55 users a month use the public PCs.

Breakdown of customers shows:

28.2% are adults
 9.1% are from Home Library Service
 8.7% are seniors
 33.4% are under the age of 12
 4.9% are teenagers aged 13-17
 9.5% are Gold card users
 0.2% are visually impaired and print denied
 0.3% are B-line 15-17 cardholders
 0.4% are B-line 18 cardholders
 0.6% are students
 1.5% are users on benefits
 0.7% have a learning disability
 0.9% are preschools/nurseries/child minders
 0.1% are reader groups/book clubs
 1.3% are staff

Please list or link below to any relevant service user/ customer or employee monitoring data and what it shows in relation to any Protected Characteristic (Age, Disability, Gender reassignment, Marriage and civil partnership, Pregnancy and maternity, Race and ethnicity, Religion and belief including non-belief, Sex or gender, Sexual orientation)

QScan – People counter

- Visitor numbers

LMS

- Registered and active users
- Breakdown of users according to age profile (gender, sexual orientation and ethnicity information not collected)
- Number of registered HLS users in the area

Netloan

- User figures

HLS

- Staff records of number of registered HLS users

If there is insufficient information, please outline any plans to remedy this?

Part 3. Analysing and assessing the impact by equality Protected Characteristic group

Use the information, customer feedback and other evidence to determine upon whom the policy/ service and any proposed changes will impact upon and how, highlighting where these are negative or positive, including where this could constitute unfair treatment, additional inequality or disadvantage or result in hardship and exclusion.

Against any identified negative potential impacts you must provide details of any action or options which could mitigate against this, and in serious cases, you should highlight where the Council would be advised not to proceed with a new or changing policy or service, including any proposals which are being considered.

Please use your action plan attached to this analysis to record the action and the monitoring which will take place to deliver such mitigation.

<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
1. Age	<p>Children and Families</p> <ul style="list-style-type: none">• Raised awareness of library service• Easier access to library resources in same place as other facilities• Situated in the Town Centre <p>Young people</p> <ul style="list-style-type: none">• Raised awareness of library service• Easier access to library resources in same place as other facilities• Situated in the Town Centre	<p>Children and Families</p> <ul style="list-style-type: none">• Different location <p>Young people</p> <ul style="list-style-type: none">• Different location

<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
	<p>Elderly</p> <ul style="list-style-type: none"> • Easier access to library resources in same place as other facilities • Some may benefit and feel less socially isolated as a result of a busier environment with a greater range of users <p>Housebound</p> <ul style="list-style-type: none"> • Not affected by potential move 	<p>Elderly</p> <ul style="list-style-type: none"> • Some may struggle to cope with increased levels of noise and interaction with a wider variety of users • Accessibility
2. Disability	<ul style="list-style-type: none"> • Easier access to library resources in same place as other facilities • Library located on ground floor for easier access • Situated in the Town Centre 	<ul style="list-style-type: none"> • Lack of quiet areas for those with dementia or autism
3. Gender re-assignment	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
4. Marriage & civil partnership ¹	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
5. Pregnancy & maternity	<ul style="list-style-type: none"> • Breast Feeding Welcome Policy in place in the library. 	<ul style="list-style-type: none"> • No impact
6. Race & ethnicity	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact

¹ Under EA 2010 – someone in a CP must not be treated less favourably than a married person

<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
7. Religion/ belief ²	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
8. Sex or gender ³	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
9. Sexual orientation	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
10. Human Rights	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
11. Thriving Communities	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
12. Rural communities	<ul style="list-style-type: none"> • Situated in the Town Centre 	<ul style="list-style-type: none"> • Different location
13. DCC Employees	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
14. Community and Voluntary sector organisations working with protected characteristic groups	<ul style="list-style-type: none"> • No impact 	<ul style="list-style-type: none"> • No impact
15. Other not listed above		

Part 4. Summary of main findings

Main findings indicate that the proposals to relocate Clay Cross and Staveley Library could impact on people of all ages and a limited number of people with disabilities. Key issues that need to be addressed are:

- Libraries situated in different locations
- Accessibility for disabled users
- Quiet areas

² Under EA 2010 – must also consider non-religious belief

³ Sex and gender can be used at different times depending upon whether you are referring to the EA 2010 and the different duties which exist

These can be offset by formal consultation gaining feedback on proposed location, providing adequate parking, ensuring enough space for disabled access and quiet areas is included in plans, and using mobile shelving to create space when needed and seating areas being available.

Part 5. Equality Action Plan

Please complete this Action Plan for any negative or unknown impacts identified in the Analysis above.

Issue identified	Action required to reduce impact/ mitigate	Timescale and responsibility	Monitoring and review arrangements
Libraries situated in different locations	DCC formal consultation	July-Sept 2023. M Parker	Review Nov 23
Access for disabled users	Ensure adequate access for disabled users on plans	During planning process	Review Nov 23
Quiet areas	Ensure a quiet area is identified on plans	During planning process	Review Nov 23
Parking	Ensure adequate parking is available	During planning process	

Part 6. Date of any Cabinet/ Cabinet Member or Council Report to which this was attached and their decision:

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FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

CABINET

7 December 2023

Report of the Executive Director - Place

Markham Vale Update on Development Progress
(Cabinet Member for Clean Growth and Regeneration)

1. Divisions Affected

- 1.1 Barlborough and Clowne, Bolsover North, Staveley, Staveley North and Whittington, and Sutton.

2. Key Decision

- 2.1 This is a key decision because it is likely to result in the Council incurring expenditure which is, or savings which are, significant having regard to the budget for the service or function concerned (this is currently defined as £500,000) and is likely to be significant in terms of its effect on communities living or working in an area comprising two or more electoral areas in the County.

3. Purpose

- 3.1 To inform Cabinet of the continuing success and progress being made in bringing forward development at Markham Vale and to provide an overview of economic activity over the period October 2022 to October 2023.
- 3.2 To note the activity planned over the coming years to bring the project to completion.

4. Information and Analysis

- 4.1 Markham Vale is the Council's flagship regeneration project and was set up to create an attractive and accessible business park over 85 hectares (200 acres). Centred around the former Markham Colliery site located between Staveley and Bolsover in the north of the County, this major regeneration project was set up in 2006 to create over 4,000 jobs, improve existing/ build new roads, bring in around £170 million of private sector investment and develop over 3 million ft² of commercial floor space.
- 4.2 In short, Markham Vale was established as a catalyst for regeneration in a deprived former coalfield area of Derbyshire and to generate business rates income for re-investment in the Derbyshire economy over the long term. Progress on development at Markham Vale was last considered by Cabinet on 8 December 2022 (Minute No.210/22 refers) and this report serves as the annual update on progress.
- 4.3 Members will recall that Derbyshire County Council has a development partnership with Henry Boots Development (HBD) to help attract suitable investors and occupiers to the site.

Overview

- 4.4 To date, the Markham Vale project has brought forward 174 of the 200 acres available for development. Of the 174 acres created, 152 acres are now either fully developed or have buildings under construction.
- 4.5 Progress is measured through a number of indicators, one of which is job creation measured through the annual survey undertaken in March each year. The 2023 survey recorded almost 2,700 people in full time equivalent jobs on the estate; although this is a similar level to 2022 and perhaps suggests limited growth, more detailed examination shows that whilst some companies have contracted in response to the wider global economics, others have expanded and increased the size of their workforce. Furthermore, anecdotal evidence indicates that over the last 6 months since the time of the 2023 survey, there has been further growth in some companies - this will be recorded in next year's survey.
- 4.6 The significant progress made in relation to bringing forward individual development sites and construction of new buildings is summarised below:

Markham Vale East

- 4.7 Refer to Appendix 2 Drawing 33A1451-1 Development Land Use and Availability WEST & EAST – Note the red shaded areas indicate the plots that currently are either unprepared or undeveloped.

Plot 1 North – The Sidings

- 4.8 This plot was originally designated for use as a rail sidings facility if required by the occupiers of land adjoining the plot. In addition, the owners of the adjoining Erin landfill site had an option to develop their own sidings on the plot if required. On the first point, all the adjoining land has now been developed and no occupier has a requirement for such a facility. On the second point, Valencia, the owners and operators of the landfill site have confirmed that they no longer require that option to develop a rail sidings facility and therefore the Council have secured clean title on the ownership of the land to develop the plot for other commercial uses. Subject to securing planning approval to change the intended end-use this plot will be brought forward for commercial and industrial development.

- 4.9 Works have been partially completed over the past year in preparing the site in readiness for development. This work has included demolition of the redundant North Tip bridge, and a replacement timber footbridge has been installed further downstream. A small area to the northern part of the plot requires engineering fill to be placed to create a single level plot; it is anticipated that these works will be completed before the end of 2023.

Plot 1 South

- 4.10 A 0.7 acre plot has been created on land to the rear of the Environment Centre; the land was previously used as a storage compound and overspill parking area. This plot will be marketed over the coming weeks to enable the plot to be sold and developed.

Plot 2 South

- 4.11 The building previously occupied by X-Bite Ltd, an internet-based retail company, remains vacated. Officers continue to support the building's owners in securing a new occupier.

Plot 5

- 4.12 Blue Whale Spa has vacated its 27,500ft² building on Greaves Close. Officers are supporting the building owner's in securing a new occupier.

Plot 9a

- 4.13 The 3-acre site continues to be marketed for a range of commercial and industrial uses.

Markham Vale West

- 4.14 Refer to Appendix 2 Drawing 33A1451-1 Development Land Use and Availability WEST & EAST – Note that the red shaded areas indicate the plots that are either unprepared or undeveloped.

Plot 6

- 4.15 Plot 6 South, a 0.7-acre development plot at the southern end of Plot 6 on Enterprise Way is being made available as a works compound on a temporary basis to enable the safe construction of the nearby Gridserve Electric Vehicle forecourt.
- 4.16 The Council's development partner, Henry Boots Development (HBD) have secured detailed planning approval for the speculative development of four buildings totalling 107,250 ft² of industrial and warehousing space. Marketing of these new units is already underway.
- 4.17 Plot 6 East, the 55,000 speculatively built unit owned by HBD has been re-let following the departure of Daher. The new tenants are Gould Alloys who have added this to their existing facility on Plot 2 to meet their growing business needs.

Plot 7

- 4.18 Construction of a 'drive-thru' fish restaurant for Chesterfield-based Chesters Ltd was completed during the year and opened to customers in July.
- 4.19 Planning permission was secured in mid-2023 for the construction of a 'drive thru' restaurant for QFM Ltd on the last remaining plot in the service area. A land sale agreement has been legally completed and officers are waiting to receive details of the construction programme which is likely to commence over the coming three months.
- 4.20 Planning permission and other legal agreements have been secured for the development of an Electric Vehicle Forecourt on Plot 7 West for Gridserve Ltd. The all-electric service station on Enterprise Way will provide 30 charging points for cars, electric lorries and other HGVs, as well as shops and a café. This is a significant development in helping the Council achieve its ambitions for decarbonising transport and attracting future fuel infrastructure. Legal completion on the Development Agreement between Gridserve, the Council and HBD was

achieved in October 2023 and construction is programmed to start in early January 2024. When complete, it will be the region's first all-electric service station offering Derbyshire residents access to environmentally friendly energy services.

- 4.21 HBD has developed proposals for a terrace of seven Trade Park units totalling 31,264ft² on the remaining part of Plot 7 West. Marketing of these units is underway.
- 4.22 Plot 8 was acquired with a legal restriction preventing its use for anything other than as either woodland or greenspace. The plot has been sold back to the previous owners who hold the restriction thereby enabling them to hold clean title to the land and for them to bring forward the plot for future development.

Markham Vale North

- 4.23 Refer to Appendix 3 Drawing 33A1451-2 Development Land Use and Availability NORTH.
- 4.24 Since the last progress report there have been no changes to the businesses based on Markham Vale North. Reflecting the earlier commentary on indigenous growth, three of the seven business based at Markham Vale North have options to increase the size of their facilities as their businesses grow and discussions are ongoing with one of those to assist with their expansion plans.

Markham Vale North Expansion (MVNE)

- 4.25 The Council's development partner, HBD, has established a joint venture company, MVNE LLP, with the Devonshire Group - the owners of adjoining land - to bring forward additional sites for industrial and commercial use. MVNE secured planning approval in 2023 to the new development. The Council has agreed terms for the release of surplus land at Markham Vale to enable the expansion site to be brought forward.

Staveley Basin

- 4.26 Staveley Basin is located on the edge of Staveley town centre and accessed off Eckington Road, Staveley. The site forms part of the Markham Vale estate having been originally acquired to facilitate the construction of the Staveley Northern Loop Road and meet the obligations of the conditions attached to the original Markham Vale planning permission which included the restoration of the Chesterfield Canal in this location. Subsequently, the Council have prepared a

mixed-use masterplan for the Staveley Town Basin site to identify opportunities for regeneration and economic development. The first phase of this development is Staveley Waterside, a two-storey building, offering flexible space for new and existing small businesses, some retail use, and a food and beverage opportunity, with indoor and outdoor dining space, along with an access road, and mooring space. Planning Permission for Staveley Waterside was secured in August 2023.

- 4.27 The Staveley Waterside proposal was one of the projects selected by the Staveley Town Fund Board as suitable for funding and the Council has secured grant funding of £2.9304m (initially £2.664m and subsequent 10% increase of £0.2664) towards the cost of building the project. Tenders to appoint a Design and Build contractor are to be invited in early November with a return of priced tenders in December.
- 4.28 The value of Markham Vale to the local economy is sizeable and growing. The current tally of private sector investment secured at the site is estimated to be in excess of £270m, generating over £7m annually in business rates; these figures will increase as further development sites are completed.
- 4.29 Marketing of the remaining development plots continues and it is likely that additional infrastructure provision will be required for each new development to meet occupier and business needs.
- 4.30 One of the original concepts for the Markham Vale project was to facilitate sustainable travel options for both home-to-work routes and for the benefit of the local community to access and enjoy the newly restored landscaped areas. Several routes to, from and through the site have already been constructed but some phases remain to be completed. One such cycle route runs for approximately 2.2km between the Environment Centre and Seymour Link Road which is now under construction and due to be completed by the end of 2023. A grant of £750,000 to meet the construction costs was secured from seed capital funding as part of the Council's Devolution Deal for low carbon projects.

Planning and Environmental Quality

- 4.31 The Council continues to work closely with the district/borough planning authorities in the preparation and submission of planning applications for either new, individual development proposals and/or the discharge of the outstanding conditions relating to the various phases of the overall Markham Vale site; the three local planning authorities are Chesterfield, North East Derbyshire and Bolsover.

- 4.32 The Walking Together art installation which forms the basis of the Markham Vale Mining Memorial was completed last year. The installation comprises 106 figures that represent those individual miners killed in the three colliery disasters at Markham.
- 4.33 Following the celebration event to unveil the final phase of the installation, funding from the National Lottery Heritage Fund enabled the Council to publish a ten-year commemorative book and a video as a culmination of the Walking Together project.

Other Services

- 4.34 The Council has a growing reputation and success in assisting new businesses to identify and fulfil recruitment and training needs. The 'Grow Your Workforce' service aims to connect businesses with other organisations and resources to help secure employment and training opportunities for local people. Discussions are ongoing with existing businesses, and the new ones locating to Markham Vale, to identify areas where the Council can assist including support and promotion of recruitment and careers fairs where businesses have been encouraged to attend and resulting in the successful recruitment of new employees.
- 4.35 The Markham Vale Team continues to make use of social media to help businesses promote vacancies and job creation news to as wide an audience as possible. Over the past year, the rate of new job opportunities being created has remained constant and between 80 and 100 vacancies are promoted each month.
- 4.36 The local business community is supported by the availability of conference and training facilities at the Environment Centre to support businesses in delivering courses and conferences to meet their growing needs. The Environment Centre also hosts several small and start-up businesses in varying sized offices and workshops. The Council provides a range of signposting and support services to help them grow their businesses. Over the past year, a small number of these businesses have grown to the extent that they have left the Environment Centre to locate to larger premises and likewise, the Council has welcomed new ones; companies which have recently located to the Environment Centre include Atlas Productions (a sound engineering company), ADI Fire and Security and AIMS (a land surveying company).

Governance: Partnership Working with HBD

- 4.37 Henry Boots Development (HBD) is the Council's private sector partner to develop the Markham Vale project. A Partnership Agreement is in

place and requires both partners to work in a spirit of mutual trust and co-operation and sets out key elements and roles of each partner.

- 4.38 A number of boards have been established to oversee delivery of Markham Vale, including an Operations Board which undertakes day to day supervision of site and infrastructure development; a Senior Officers' Board which manages implementation of the development as a whole; and a Partnership Board to oversee the Development Partnership. Each Board consists of three representatives from the Council and three from HBD.
- 4.39 Legal advice on managing the Partnership Agreement between the Council and HBD and the individual development disposals continues to be provided by Geldards LLP.
- 4.40 The Council continues to provide a range of site management and maintenance services across the wider 900 acres Markham Vale site under the branding of Markham Vale site facilities. The costs of providing services will be fully met when the site is fully occupied by income from the site facilities charge levied on all the businesses based at Markham Vale. This index-linked charge is based on the acreage that the businesses occupy. Currently, the development site is approximately 76% sold and occupied.

Next Steps in Driving Completion of Markham

- 4.41 As outlined earlier in this report, priority over the past year has been focused on securing new occupiers and completing developments. The anticipated progressive development on Markham Vale West and the infill development on Markham Vale East will require the completion and installation of plot-specific infrastructure over the coming 2-3 years, along with completing outstanding planning obligations.
- 4.42 A planned completion date for the whole estate, based on current development rates, is December 2025, although pace and momentum in the final stages of the project will be dependent on external market forces and completion of construction at Staveley Waterside.
- 4.43 Ensuring effective project and programme delivery to meet the timely requirements of inward development investment challenges is aided by the Council's approach to delegated approval aligned to the Executive Director – Place, and the Leader of the Council. To support continued programme delivery, the Place Department will continue its approach to project and programme management, ensuring critical alignment of available resources to support delivery.

- 4.44 In the meantime, and having full regard to the Council's continuing budget challenges, a fundamental review of fees and charges, including services provided in and around the Environment Centre, is being undertaken to ensure compatibility with market rates, full cost recovery and to maximise the Council's return on investment. Work is also commencing to explore future delivery models for the estate post-completion of development and options will be presented to Cabinet members in due course.

5 Consultation

- 5.1 None required in relation to the contents of this report, although Cabinet should note that individual proposals for plot development are subject to public consultation as part of the planning process.

6 Alternative Options Considered

- 6.1 Option 1: Do Nothing – the Council has a partnership agreement with Henry Boots Limited to bring forward sites and secure their development. This is therefore not an option.
- 6.2 Option 2: Slowdown the rate of progress and deprioritise site development. It is considered this would be counter-productive to job creation and achieving the much-needed rate of return on the Council's previous level of investment. Ensuring timely and effective progress against the planned delivery programme is essential in supporting growth in this deprived area of Derbyshire.

7 Implications

- 7.1 Appendix 1 sets out the relevant implications considered in the preparation of the report.

8 Background Papers

- 8.1 Markham Vale Development Framework (Confidential).

9 Appendices

- 9.1 Appendix 1 – Implications.
- 9.2 Appendix 2 - Drawing 33A1451-1 Development Land Use and availability WEST & EAST.

9.3 Appendix 3 - Drawing 33A1451-2 Development Land Use and Availability NORTH.

10 Recommendations

That Cabinet:

- a) Notes the continuing success and progress made in bringing forward development at Markham Vale and the economic activity that has taken place over the period October 2022 to October 2023.
- b) Notes and approves the activity planned over the coming years to bring the project to completion.

11 Reasons for Recommendations

- 11.1 To ensure Cabinet members are provided with accurate and timely information on the development of Markham Vale and the return on investment.

12 Is it necessary to waive the call in period?

- 12.1 No.

Report Author: Peter Storey

Contact details: Peter.Storey@derbyshire.gov.uk

Implications

Financial

Budget 2022-23

- 1.1 The Capital budget for 2022-23, incorporating slippage from the previous year, resulted in an outturn expenditure of £0.719m.
- 1.2 Remaining capital budget at the end of 2022-23 was £1.934m. The works remaining to complete the project are estimated to be contained within this approved budget and briefly comprise remaining land disposal legal fees, provision of infrastructure as each plot is brought forward for development, works to meet the outstanding planning and contractual obligations, remaining landscaping works and all associated design fees. The costs of these remaining works can be fully funded from capital receipts from the sale of the remaining development plots currently, but all opportunities will continue to be identified to secure alternative grant funding where appropriate.
- 1.3 The Markham Vale project will see the creation of up to 200 acres of new development land sold and occupied to the private sector. The remaining area of over 600 acres largely comprises woodland, water features, grassland and other amenity land and on completion of the project, is intended to be managed and maintained through the Markham Vale Site Facilities which is fully funded through an index-linked charge levied on each occupier based on the acreage they own/occupy.
- 1.4 The current charge amounts to £1,396.50 per acre and in this financial year, generates a revenue income of approximately £211,000 towards the Site Facilities Maintenance costs of £279,300; the shortfall is currently funded by part of the surplus generated by rental income from the business units at the Environment Centre. As each plot is sold and developed then the revenue generated from the Site Facilities Charge will increase, such that when the site is fully developed the service will be cost neutral.
- 1.5 The budget and programme will be kept under review and regular reports made to Cabinet. Members should note the review of fees and charges which has commenced to ensure full cost recovery of key areas of work.

Legal

- 2.1 Advice on managing the Partnership Agreement between the Council and HBD and the individual development disposals continues to be provided by Geldards LLP.

Human Resources

- 3.1 None directly related to this report.

Information Technology

- 4.1 None directly related to this report.

Equalities Impact

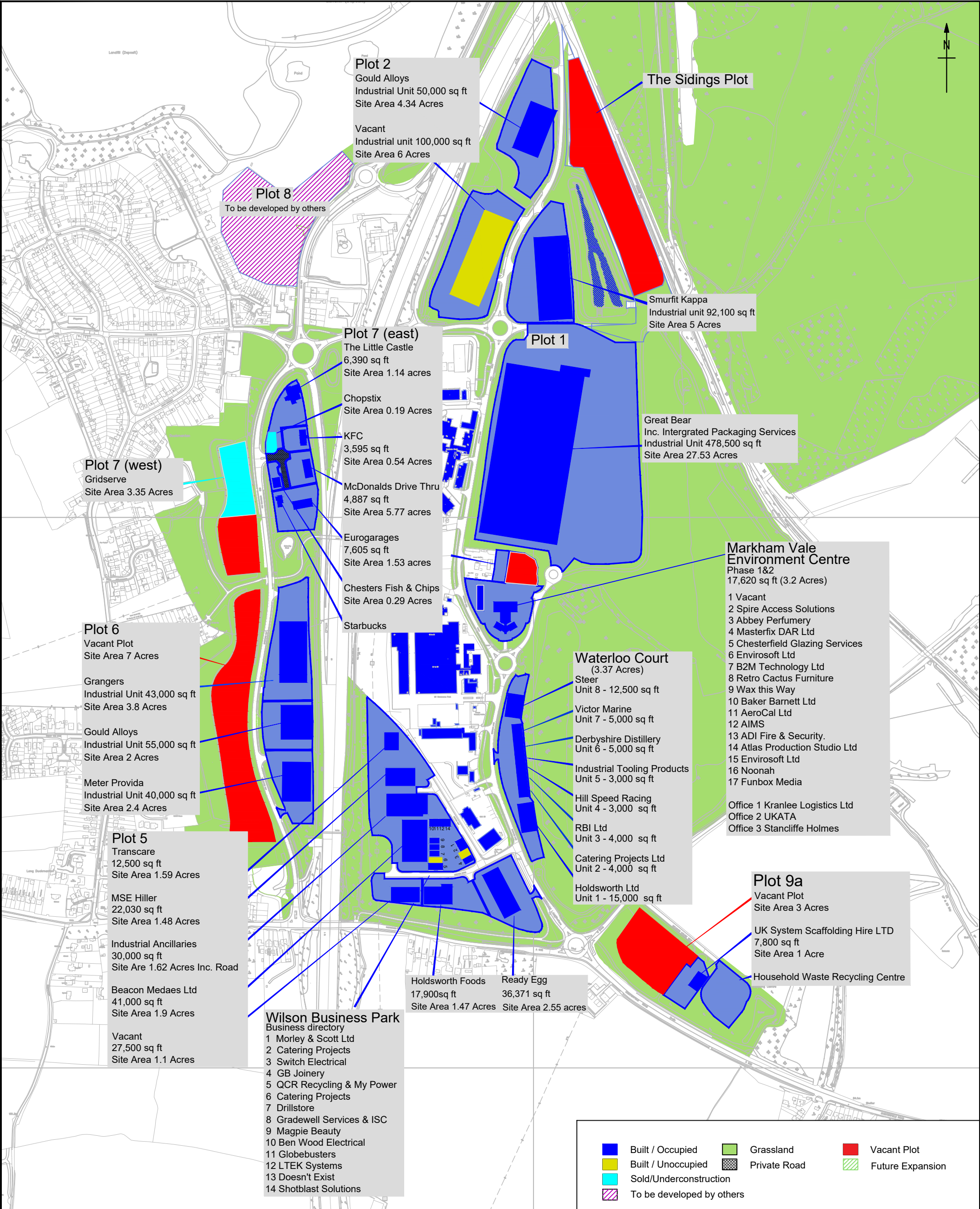
- 5.1 Work with developers and new occupiers at Markham Vale is undertaken to support recruitment of labour from the local economy, ensuring workforce profiles are reflective of local communities. The installation of walking and cycle routes around the estate and immediate area also helps ensure households without access to private vehicles have opportunities for low cost travel to work.

Corporate objectives and priorities for change

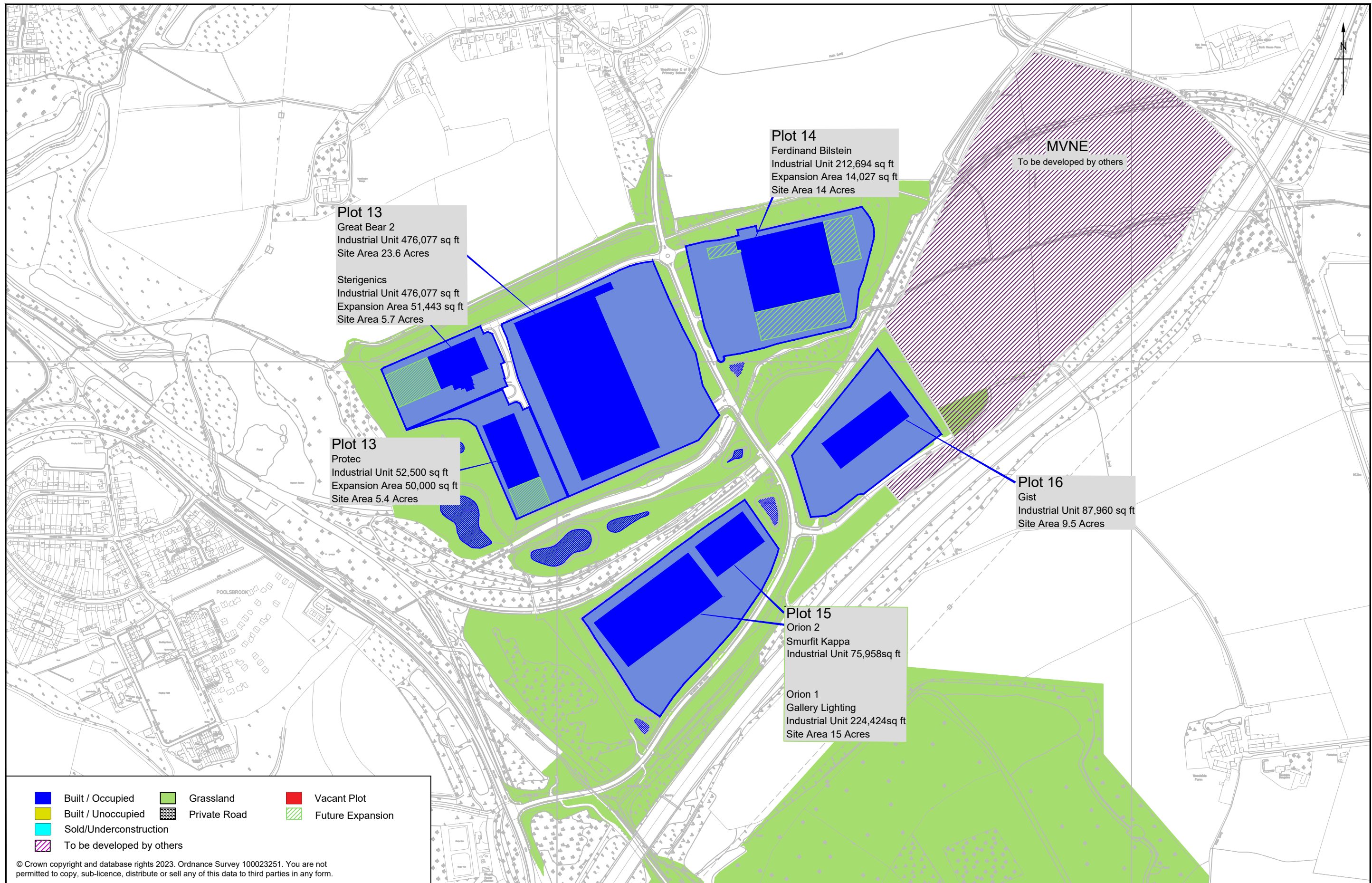
- 6.1 The continued redevelopment of Markham Vale directly supports the Council's objective to create a 'Green and Prosperous Derbyshire' as set out in the Council Plan 2023- 2025. Specifically, increasing levels of inward investment into the county and connecting people to local job opportunities are stated priorities in the Council Plan.

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)

- 7.1 None.



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Chris Henning
Executive Director - Place

Land Reclamation Section
Highways Division



Plot information Updated

AMENDMENT DETAILS

BY	CHKD	APVD	DATE	N0.
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PROJECT TITLE	
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DRAWING TITLE

Development Land Use and Availability
(2 of 2)

DRAWN

I Moss

Date 1st November 2023

CHECKED

Date

APPROVED

Date

Project Reference No.	9033
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Drawing Number 9033/1451-2B

Print Date 01 Nov, 2023 - 9:08am

SCALE

N.T.S

At A3 (420 x 297mm)

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FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

CABINET

7 December 2023

Report of the Executive Director - Place

Green Towns Consultation Outcome

(Cabinet Member for Highways, Assets and Transport)

1. Divisions Affected

- 1.1 Buxton North and East, Buxton West, Long Eaton, Petersham, and Sawley.

2. Key Decision

- 2.1 This is a key decision because it is likely to be significant in terms of its effect on communities living or working in an area comprising two or more electoral areas in the County.

3. Purpose

- 3.1 To inform Cabinet of the findings of the public consultation on the proposed introduction of 20mph speed limits in areas surrounding the town centres of Buxton and Long Eaton and recommend the next steps based upon these findings.

4. Information and Analysis

- 4.1 At the meeting on 12 January 2023, Cabinet approved the carrying out of a consultation and public engagement exercise for the introduction of 20mph speed limits under the Road Traffic Regulation Act 1984 on roads in areas surrounding the town centres of Buxton and Long Eaton (Minute No. 8/23 refers).

- 4.2 A public exhibition was carried out in Buxton on 23 and 24 January 2023 at the Pump Room in the town centre, and in Long Eaton on 31 January and 1 February 2023 in the Council Chamber at the Town Hall. This coincided with the launch of an on-line questionnaire which was open for a period of 12 weeks (19 January 2023 to 13 April 2023).
- 4.3 The statutory advertisement of the speed limit proposals, which forms part of the Speed Limit Order making process, was carried out from 18 May to 9 June 2023. Eighty seven street notices were erected in Buxton and 179 in Long Eaton to coincide with the Notice being advertised in the local press (Buxton Advertiser and Derby Evening Telegraph).
- 4.4 Further evening exhibitions were held to coincide with the statutory Speed Limit Order consultation. These were both from 3.00pm until 8.30pm at Long Eaton Town Hall on Wednesday 24 May and Buxton Pump Room on Thursday 25 May 2023. Twenty seven people attended the Buxton event with 7 being in favour of the proposals, 19 not in favour and 1 unsure. Twenty-three people attended the Long Eaton event with the majority not being in favour of the proposals, albeit some did appreciate the scheme intentions but had significant reservations about the application of a 20mph speed limit to the A and B classified roads within the scheme extents.
- 4.5 The on-line consultation yielded 142 respondents from Buxton and 218 respondents from Long Eaton.
- 4.6 The Council carried out extensive media communications on the two proposed schemes, with a media release on 19 January 2023, which went to 17 separate media outlets. This was in addition to social media posts via the Council's media respective channels and e-newsletter. A further media release was carried out on 15 May 2023 for the Buxton event on 25 May which went to 18 different media outlets, whilst the media release for the Long Eaton event on 24 May, went out to 10 different media outlets on the same day.
- 4.7 Statutory and stakeholder consultation was also carried out. The Police raised "*grave concerns*" about the blanket implementation of 20mph speed limits without any physical traffic calming measures (or similar) to aid compliance. There were concerns about the strategic routes that the 20mph speed limit affected. The Police view is that the speed limit proposals would present them with an unreasonable enforcement task. The lower speed limit would raise the expectations of the public and generate a high level of calls for enforcement for perceived non-compliance which they would not be able to react to with their current

resources. This could create further issues with public confidence in the Police authority.

- 4.8 High Peak Buses lodged an objection to the proposal as it considers that it will have significant negative consequences for its business and the overall efficiency of its services. No comments were received from Public Transport operators in relation to Long Eaton.
- 4.9 Based on consultation outcomes of Buxton and Long Eaton, the Council has no further proposals to trial 20mph Speed Limits at other locations within the County. Any future requests will be considered in line with the guidance provided in the Speed Management Protocol Policy.

5. Consultation

- 5.1 Buxton Response: A total of 205 responses with 104 in favour and 100 against (1 blank response). The MP for the High Peak, Robert Lorgan, also carried out his own consultation on the proposal which yielded 409 responses with 70 agreeing with the proposals, 201 disagreeing with them and 138 suggesting that 20mph should only apply in residential areas and around schools and not on main roads.
- 5.2 Long Eaton Response: A total of 306 responses with 63 in favour and 184 against (59 blank responses). Several responses were supportive of the scheme in Long Eaton if the Council was to remove the A-Road and B-Road network from the scheme, as they felt this proposal would only add further congestion to an already congested road network with vehicles driving at or below 20mph.

6. Alternative Options Considered

- 6.1 Option 1 – Implement the proposed Green Towns 20mph speed limit trial in Long Eaton and Buxton as proposed within the consultation. While the pilot scheme has significant merits, it relies on both public support and pro-active police enforcement to work effectively. The police response set out that enforcement would be very difficult without engineering measures being taken – which are not contained within the proposal. It is clear from the consultation feedback that we would not be able to rely on public support in either area, thus undermining the objectives of the pilot. This option is therefore rejected.
- 6.2 Option 2 – Do not implement the trial schemes, for the reasons set out in this report. This is the recommended option.

7. Implications

- 7.1 Appendix 1 sets out the relevant implications considered in the preparation of the report.

8. Background Papers

- 8.1 The County Council's Highway Network Management Plan
<https://www.derbyshire.gov.uk/site-elements/documents/pdf/transport-roads/roads-traffic/highway-network-management-plan.pdf>
- 8.2 The County Council's Speed Management Plan
<https://www.derbyshire.gov.uk/site-elements/documents/pdf/council/meetings-decisions/meetings/cabinet/2017-11-16-speed-management-plan.pdf>
- 8.3 The Traffic Signs and General Directions Regulations 2016
<https://www.gov.uk/government/publications/traffic-signs-regulations-and-general-directions-2016-an-overview>
- 8.4 Report to Cabinet 20mph Speed Limits in Derbyshire, dated 31 January 2019 (Minute No. 03/19 refers).
- 8.5 Department for Transport commissioned study on 20mph speed limits on roads – 22 November 2018
https://www.gov.uk/government/publications/20-mph-speed-limits-on-roads?utm_source=4a35f8cc-0f02-429c-b984-0a590e326628&utm_medium=email&utm_campaign=govuk-notifications&utm_content=immediate
- 8.6 Report to Cabinet, Council Plan Refresh 2023-23, dated 10 March 2022 (Minute No. 58/22 refers).
[Council Plan Refresh 2022-23](#)
- 8.7 Report to Cabinet 20mph Speed Limits in Derbyshire, dated 3 May 2016 (Minute No. 132/16 refers).
- 8.8 Report to Cabinet, Green Towns, dated 12 January 2023 (Minute No. 8/23 refers).

9. Appendices

- 9.1 Appendix 1 – Implications.

10. Recommendations

That Cabinet:

- a) Notes the findings of the public consultation on the introduction of 20mph speed limits in areas surrounding the town centres of Buxton and Long Eaton.
- b) Approves that the Council does not proceed with the introduction of 20mph speed limits in areas surrounding the town centres of Buxton and Long Eaton.

11. Reasons for Recommendations

- 11.1 Following the extensive consultation exercises carried out as approved by Cabinet on 12 January 2023, the feedback received does not demonstrate a majority in favour of such a scheme being introduced. The point of the exercise was to gauge public opinion and not taking the proposals forward will accord with that public opinion in both Buxton and Long Eaton.

12. Is it necessary to waive the call in period?

- 12.1 No.

Report Author: Steven Alcock

Contact details: Steven.Alcock@derbyshire.gov.uk

Implications

Financial

1.1 There are no financial implications for the Council.

Legal

2.1 The County Council has powers under the Road Traffic Regulation Act 1984 to make such Orders, following The Local Authorities' Traffic Orders (Procedure) (England and Wales) Regulations 1996, as it deems necessary for the purpose of controlling traffic on any highway for which it is the highway authority.

Human Resources

3.1 None.

Information Technology

4.1 None.

Equalities Impact

5.1 Not required.

Corporate objectives and priorities for change

6.1 None.

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)

7.1 None.



FOR PUBLICATION

DERBYSHIRE COUNTY COUNCIL

CABINET

7 December 2023

Report of the Executive Director - Adult Social Care and Health

**Charging Policy for Local Residents in Receipt of Adult Social Care
Support in the Community**

(Adult Social Care and Health)

1. Divisions Affected

Countywide.

2. Key Decision

2.1 This is a key decision because, if the proposed changes are made, it is likely to:

- a) result in the Council incurring expenditure which is, or savings which are significant having regard to the budget for the service or function concerned.
- b) be significant in terms of its effect on communities living or working in an area comprising two or more electoral areas in the County.

3. Purpose

3.1 To inform Cabinet of the response to the consultation on the current Charging Policy for people receiving Adult Social Care support in the community and the current Disability Related Expenditure process.

- 3.2 To inform Cabinet of the outcome of the updated Equality Impact Analysis.
- 3.3 To seek approval for the implementation of the proposed revised Charging Policy for people receiving Adult Social Care support in the community and recommendations about the preferred course of action.

4. Information and Analysis

4.1 Background and Context

- 4.1.1 The Council is committed to achieving good outcomes for local residents who require Adult Social Care support; recognising that local residents want to remain living in their own homes, wherever possible, for longer. The Council is keen to offer support which promotes independence and offers local residents choice and control over this support.
- 4.1.2 Due to the increasing demand for Adult Social Care, to meet needs for care and support alongside the need to continue to deliver high quality services, the Council must now consider how to sustainably fund Adult Social Care support. The Council needs to consider how it can ensure Adult Social Care support will meet the needs of local residents, not only now but also in the future.
- 4.1.3 The Council must be able to meet its statutory duties whilst being able to provide support to those who need it most. The offer of Adult Social Care support must be sustainable and equitable. Under the current charging policy, the projected income for this financial year is £10.552m with the projected spend on Adult Social Care long term community support being £127.2m.
- 4.1.4 Local Authorities are required to provide certain functions under the Care Act 2014 relating to Adult Social Care support. These include ensuring local residents:
- Receive support that prevents their care needs from becoming more serious or delays the impact of their needs.
 - Can get the information and advice they need to make good decisions about care and support.
 - Have a range of provision of high quality, appropriate support to choose from.

- 4.1.5 Under the Care Act 2014, Local Authorities have discretion to choose whether to charge for Adult Social Care community support provided to meet eligible needs, except where it is required to arrange care and support free of charge (such as certain types of community equipment or if the care is to be provided free under other legislation for example section 117 of the Mental Health Act which entitles people to receive free aftercare following compulsory detention in hospital).
- 4.1.6 The regulations issued under the Care Act 2014 and LAC (DHSC) (2023)¹ set the current levels of capital (savings and assets) a person can have whilst qualifying for financial support from their local authority. The current upper capital limit is £23,250. People with capital between £14,250 and £23,250 are charged a tariff income of £1 for every £250.
- 4.1.7 The capital limits described above are mandatory for care home residents but for adults receiving Adult Social Care support in the community, local authorities have discretion to set a higher upper capital limit, a higher tariff income and a lower financial contribution rate.
- 4.1.8 People receiving local authority-arranged support other than in a care home need to retain a certain level of income to cover their living costs. Under the Care Act 2014, charges must not reduce people's income below a certain amount, but local authorities can allow people to keep more of their income if they wish. This is a weekly amount and is known as the Minimum Income Guarantee. The rates of the Minimum Income Guarantee are set annually and the current rates may be found [here](#).
- 4.1.9 There is a national statutory framework taking into account extra expenditure that people incur in relation to disability or long term health condition, known as Disability Related Expenditure. A Local Authority must take this expenditure into account in financial assessments to make sure that people who pay towards their care and support have enough money to live on. Where a person feels the additional cost of Disability Related Expenditure is over and above that already allowed in the contribution determination, they are entitled to an individual assessment of their Disability Related Expenditure. The purpose of this assessment is to establish whether a full or partial reduction in the contribution would be appropriate.
- 4.1.10 In contrast to the NHS where services are *generally* free, charging for Adult Social Care is not a new concept and a significant number of

people across the Country pay towards the cost of their care and support, as all Local Authorities charge a contribution.

- 4.1.11 Under the Care Act 2014 and its associated guidance and regulations, the Council has discretion as to what charges should be applied for non-residential care and support packages incorporating the treatment of both income and capital, as long as the Minimum Income Guarantee is protected. The Council has, to date, decided to charge less to those people receiving adult social care support in the community than allowed by the national guidance.

The current charging policy for local residents in Derbyshire who receive social care support in the community is as follows:

- People self-fund their care if they have savings above £50,000.
- For those who have savings of less than £50,000 and are in receipt of a benefit or allowance specifically made available for an assessed care/support need, such as Attendance Allowance (AA), Disability Living Allowance (DLA) or Personal Independence Payment (PIP), the maximum amount they contribute towards their care is £51.07 (75% of the benefit) per week or less.
- Tariff income is calculated at £1 for every £500 but people are not charged tariff income. It is applied solely to calculate if their income is of a high enough level to make a contribution towards their care costs.

The Council also operates a Disability Related Expenditure process.

- 4.1.12 On 15 June 2023, Cabinet approved the following:

- a. Commencement of a 12-week public consultation
- b. To receive a further report following the conclusion of the consultation process including an updated Equality Impact Analysis.

- 4.1.13 The report to Cabinet on 15 June 2023 set out three options available to the Council to revise the current charging policy. During the consultation alternative suggested options could also be made.

Option One

To change the charging policy for local residents in receipt of support in the community to:

- The national position concerning the capital limit of £23,250
- The national position concerning charging tariff income of £1.00 in every £250 for those with capital between £14,250 - £23,250
- To charge on 100% of disposable income with a £20 per week Disability Related Disregard (*subject to the below).

Option Two

To change the charging policy for local residents in receipt of support in the community to:

- The national position concerning the capital limit of £23,250
- The national position concerning charging tariff income of £1.00 in every £250 for those with capital between £14,250 - £23,250
- To charge on 90% of disposable income with a £20 per week Disability Related Disregard (*subject to the below).

Option Three

To change the charging policy for local residents in receipt of support in the community to:

- The national position concerning the capital limit of £23,250
- The national position concerning charging tariff income of £1.00 in every £250 for those with capital between £14,250 - £23,250
- To charge on 80% of disposable income with a £20 per week Disability Related Disregard (*subject to the below)

(*Under national guidance where a person feels the additional cost related to their disability, Disability Related Expenditure, is over and above that already allowed in the contribution determination, they are entitled to an individual assessment of their disability related expenditure. The purpose of this review is to establish whether a full or partial reduction in the contribution would be appropriate.)

4.1.14 Alongside the above proposals, to ensure a transparent and accessible approach to Disability Related Expenditure, the Council also as part of the consultation, consulted on revising the current Disability Related Expenditure process.

4.1.15 To ensure a standardised approach to charging for people who live in the community, it was also proposed to include the charging for short term residential respite within the proposed revised charging policy.

4.2 The Consultation

4.2.1 The formal consultation on the future of the charging policy ran from the 3 July 2023 to 4 October 2023. The consultation aimed to reach all potentially impacted people or their financial representative and/or other interested parties to inform them of the proposed changes to the policy, as well as wider members of the public.

4.2.2 Officers enabled as many people as possible to take part, by offering a range of ways in which people could share their views:

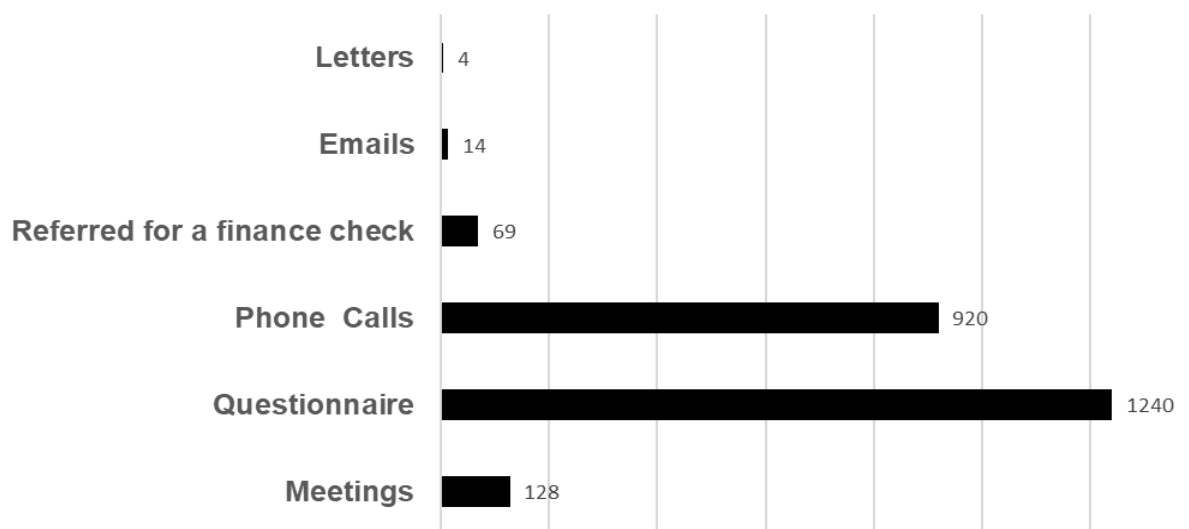
- Media releases were issued during the consultation and news releases were published on the Derbyshire County Council website. Articles were included in the council's e-newsletters and information was posted regularly on the council's corporate facebook and twitter pages. Posters encouraging people to take part were sent to be displayed at all the county council's libraries as well as GP practices, district and borough council offices.
- All current residents receiving Adult Social Care support in the community and their financial representatives (formal and informal) received an initial letter detailing the proposed changes to the charging for the service.
- Within this initial letter there was a printed version of the questionnaire, with a stamped address envelope and explanatory information to help the recipient understand the proposals and how they may impact on them.
- There was also an invite to the planned meetings 5 online (held at different times of the day) and 6 face to face held across Derbyshire.
- Questionnaire in different formats, such as other languages or larger print were offered if this was more appropriate.

- A specific Derbyshire Consultation webpage was established, detailing the proposals and to enable completion of the online questionnaire.
- People were given opportunity to write into the Council via a letter or dedicated email address.
- Additional colleague resources were deployed in the Stakeholder Engagement team to ensure telephone interviews could be offered for those people requiring support to complete the questionnaire.
- An online calculator was developed so that respondents had the opportunity to input their personal financial circumstances to enable them to understand how each proposal might impact on them.
- This online financial calculator offer was enhanced allowing people to have a phone call from a finance specialist to assist with completing.
- A further letter was sent during the consultation to remind people of the closing date and inviting them to a further 7 meetings (both online and face to face)
- A British Sign Language (BSL) video was uploaded onto the Derbyshire County Council website describing to the deaf community how to get involved with the consultation.

4.3 Response to the Consultation

- 4.3.1 In total 2375 people responded to the consultation. The graph below shows a breakdown of the methods used by the respondents to engage in the consultation.

**Analysis of method of response to Consultation on
changing the charging policy fo local residents in receipt
of adult social care support in the community**



4.4 Analysis

4.4.1 The main themes are highlighted below:

- **Negative Impact on Personal Finances:** respondents commented on the negative impact the proposals would have on their personal finances not only in terms of their weekly incomes and the current cost of living but also being a disincentive for people to save. Many respondents considered the percentages too high.
- **Disagree with the proposals:** most respondents disagreed with the proposals. A number of respondents stated the £50,000 capital limit should remain in place and considered the percentages to charge on weekly income too high. Respondents considered the current charging policy should remain and people in receipt of Attendance Allowance or Personal Independence Payments should not pay more towards their social care support.
- **Alternative Suggestions:** respondents, although recognising the budget pressures, suggested alternative options including a phasing in of approach and a reduction of the percentages. Some respondents suggested the Derbyshire Minimum Income Guarantee should remain in place rather than the introduction of the National Minimum Guarantee.

- **Complexity of Consultation:** respondents commented on the complexity of the consultation. This is acknowledged as charging for Adult Social Care is complex and terms used within the national guidelines are not easy to interpret. Respondents attending the online or face to face meetings feedback was that these were useful and due to this a further 7 sessions were planned. Additional colleague resources were made available to the Stakeholder Engagement Team and the route of a phone call proved popular.
- **Agree with proposals:** some respondents agreed with the proposals. Whilst many responses to the consultation were not in favour of any changes to the charging policy, 21% respondents agreed with the proposal to charge on 80% of disposable income (Option 3), with 5.9% favouring 100% (Option 1) and 3.3% favouring 90% (Option 2).
- **Impact on People and Carers:** some respondents raised the negative impact that these proposals would have for people with a disability or those living with a long-term health condition. They stated that this group may be influenced to cancel their care if these proposals went ahead.

Detailed information about the consultation and feedback received is outlined in Appendix 4 and must be read alongside this report.

4.5 Recommendations

- 4.5.1 Over the last nine years, since the introduction of the Care Act, the Council has not made any fundamental changes to its community charging policy. Consequently, social care charges in Derbyshire are significantly lower than the limits allowed by the national charging guidelines and those applied by many other local authorities across the country. This has been the Council's position for many years, with the most recent amendments to non-residential charging being in 2014.
- 4.5.2 The Council currently charges for services at a lower rate than the real cost of delivery. It delivers care and support by provision of a subsidy for some who may have the financial means to pay the full cost or could afford to pay more. The Care Act 2014 and the wider legislation provides a national framework for local authorities to charge, providing charges are reasonable and appropriate ensuring people retain a certain level of income to cover their living costs.

- 4.5.3 It is important the Council finds solutions to manage its limited resources in ways that are equitable to all current users of Adult Social Care support, as well as those who may require this type of support in the future. All the proposed options align the Council's community charging policy closer to the national guidance and those applied by other Local Authorities. The national framework is the driver for the impact on disabled people.
- 4.5.4 Demand and costs are rising, and the Council can no longer afford to fund the current Charging Policy within the existing or future budget available. This concern for the sustainability of funding arrangements was emphasised within the consultation. The Council's current financial position announced on the 13 September 2023 brought affordability for Adult Social Care into even sharper focus.
- 4.5.5 To ensure the Council can continue to fulfil its statutory responsibilities, a decision is required to protect Adult Social Care provision for people who most need support from the Council.
- 4.5.6 By moving to option 1, the council would align with the national guidelines and many other Local Authorities. This would also support the Council's overall budget challenges recognising the Council has a statutory and fiduciary duty to balance the budget and has to consider all duties within this. However, it is acknowledged that applying the national guidelines in this way would have the most significant financial impact for disabled people and people with long term health conditions. Since the consultation, officers have come to consider that option 1 is not viable.
- 4.5.7 By moving to option 3, the Council would still ensure Derbyshire County Council operates a more generous policy than other surrounding Local Authorities and would continue to assist people, with lower capital and income levels to financially pay for social care support whilst generating additional income. However, given the current Council budget position this would not ensure sustainability for Adult Social Care going forward.
- 4.5.8 Therefore, the preferred option is option 2. This still ensures that Derbyshire County Council continues to operate a more generous policy than the national minimum and other surrounding Local Authorities. This option balances the need to continue to assist people, with lower capital and income levels to financially pay for social care support whilst generating additional income and ensuring sustainability for the future.

- 4.5.9 In addition to the above it is recommended that the Council adopts a new Disability Related Expenditure Process. This would include a standard £20 disregard but would permit people to apply more of their expenditure defined as Disability related. The Council would also disregard the difference between the lower and higher rate of Attendance Allowance and Person Independence Payments (Daily Living Component) and the difference between the mid and high rate of Disability Living Allowance. This would ensure that additional daily living cost incurred by disabled people or people with a long term health condition are recognised and protected.
- 4.5.10 It is considered that offering standard rate of disregard would make the process less onerous for disabled people. If no standard disregard is offered, this would require a large number of people to go through the Disability Related Expenditure Process. This would be more onerous for people receiving Adult Social Care support in the community and would place an additional administrative burden on them. Therefore, if an individual's Disability Related Expenditure is generally £20 or less, they would not need to go through this administrative process. The Council believes that this level would cover the majority of additional daily living costs faced by disabled people and people with a long term health condition.
- 4.5.11 Careful consideration has been given to the right level for any standard disregard rate. To this end, research was completed across other local authorities who currently charge in line with the national guidance. This showed that a number of local authorities do not offer a standard disregarded amount. For those Local Authorities who do offer a standard rate, the average disregard sum varies. In the end, the Council has identified the rate of £20 per week, which is offered by Nottinghamshire County Council. This rate was arrived at by Nottinghamshire County Council in cooperation with people with relevant lived experience. This standard rate would be reviewed on a yearly basis.
- 4.5.12 People whose Disability Related Expenditure exceeds this level would be able to make an application for a higher amount to be disregarded. A specialist team would be established to support disabled people and people with a long term health condition who consider their daily living costs linked to their disability or long term health condition to be higher. This would ensure any additional claims can be dealt with by colleagues who have specialist knowledge, applying a transparent, accessible and straightforward process.

- 4.5.13 Implementation of the recommendations would include transfer of charging contributions for short breaks within a residential setting to the proposed revised community charging policy. Currently people who access short breaks within a residential setting are charged under the residential policy and pay standard rate contributions on top of any charge for their community support. This change would ensure people requiring this type of support are not penalised, and charging would take account of the whole of the person's support and their individual financial circumstances.
- 4.5.14 If the proposed changes are to be implemented, it is recommended that the Council should provide a notice period to give people time to prepare and organise their finances appropriately. It is therefore proposed that any changes to the Charging Policy would come into effect for everyone on the 15 July 2024.
- 4.5.15 Subject to approval being given by Cabinet to adopt the amended Charging Policy, permission has been obtained from the Director of Legal Services, Corporate Procurement and Director of Finance in accordance with Protocol 2(a) of the Council's Financial Regulations to use the G-Cloud to directly award a contract to a specialist external provider to complete the consequential financial assessments required at a cost of approximately £200k.
- 4.5.16 At the beginning of each financial year, people's financial assessments are reviewed and upwardly adjusted to reflect inflationary rises on welfare benefits and other sources of income. If Cabinet agrees to the proposals, it is recommended that the annual uplift that would apply to the current scheme in April 2024 be deferred until July 2024 when the new charging policy would commence. This would avoid people having two increases to their co-funding contribution in the same financial year, allowing people to prepare and avoid any confusion. The financial loss to the council resulting from the delay in applying the inflationary uplift would be £142,000.

4.6 Next Steps

- 4.6.1 There are approximately 6535 people who are in receipt of Adult Social Care support in the community who are financially contributing to their support.
- 4.6.2 It is recognised that many people already in receipt of community support are likely to be financially affected. The projections, based on a sample of 300 cases, identified if the recommendation is approved by Council, people would be affected as follows:

Effect	No of People	% of People
Remain at Nil Cost	48	16.0%
From Nil to paying a contribution	17	5.7%
Increase in Charge	188	62.7%
Decrease in Charge	4	1.3%
Become Full Cost Payers	43	14.3%
Total	300	100.0%

- 4.6.3 Every person already in receipt of adult social care support in the community would be offered a review of their care and support plan, unless a review has been undertaken in the last 6 months to ensure they are in receipt of the most appropriate support for their needs.
- 4.6.4 Under the proposals each person receiving chargeable care would have an individual means-tested full financial assessment based on their specific situation. This moves away from historical light touch financial assessments. It is proposed the assessment process would begin in January 2024 to ensure people have prior notice to prepare for the new charges.
- 4.6.5 During the transition period, the Council would ensure sufficient support, information and guidance was available to assist people. This may include referrals to Welfare Rights or people signposted, where appropriate, to the online *Welfare Rights Better Off*, to maximise their income.
- 4.6.6 If, after a financial assessment, people felt they were not able to support themselves with their remaining income then they would be able to seek an individual assessment of their Disability Related Expenditure to establish whether a full or partial reduction in their contribution would be appropriate. This process would ensure no-one would suffer undue financial hardship. Charges would only be levied

against those whom the law says can afford to pay them, following individual financial assessment.

- 4.6.7 If the outcome of the financial assessment concludes the person must pay for the full cost of their care, the provision of their care and support needs remains the priority and the Council would if required continue to commission the appropriate levels of support on their behalf.

5. Consultation

- 5.1 The Council conducted a public consultation exercise, including consultation with members of the public, people currently receiving Adult Social Care support in the community and / or their financial representative and / or any other interested parties. The consultation has enabled the Council to:

- Provide information on the options and seek views and concerns.
- Understand whether there are any other viable options the Council has not considered.

- 5.2 The Improvement and Scrutiny Committee – People also wished to consider the consultation and provide its views to Cabinet. On 1 November 2023, the Committee considered the public consultation undertaken and the key themes raised. The Committee was supportive of the way in which the public consultation was conducted.

6. Alternative Options Considered

- 6.1 Whilst a high number of respondents supported the option of doing nothing, this is not viable for the Council. This would affect the sustainability of Adult Social Care support for the Council.

- 6.2 The main other alternative suggestions being made through the consultation were:

- Retain existing or set a more generous capital limit than the national framework.
- Retain Derbyshire County Council Minimum Income Guarantees and do not introduce the national Minimum Income Guarantees.
- Retain or increase the current capped cost by inflation or another amount and do not move to the national position or the 90% or the 80% concerning weekly income.

- Change the charging policy for new users of the Adult Social Care Support only.
- 6.3 Whilst raising the Adult Social Care precept is still an option for the Council for 2024/2025, each 1% increase would only generate approximately £3.7M per annum and there are further significant pay, price and demand pressures for the whole of the Authority to be addressed for 2024-25
- 6.4 Demand and costs are rising, and the Council can no longer afford to fund the current Charging Policy within the existing or future budget. This was emphasised within the consultation. The Council's current financial position announced on the 13 September 2023 has brought affordability for Adult Social Care into even sharper focus. To ensure the Council can continue to fulfil its statutory responsibilities, a decision is required to protect Adult Social Care provision for people who most need support from the Council.
- 6.5 The Council cannot treat existing people receiving Adult Social Care support differently from new people approaching Adult Social Care for support as this would result in indirect discrimination based on age and /or disability.
- 7. Implications**
- 7.1 Appendix 1 sets out the relevant implications considered in the preparation of the report, including how the Council would fulfil its obligations under the Care Act 2014.
- 8. Background Papers**
- 8.1 Current Co-Funding Policy for Non-Residential Care Services
- 8.2 Cabinet Paper 17 June 2014- Report of the Executive Director For Adult Social Care Changes to Adult Social Care Policies on Transport, Client Contributions and The Eligibility Threshold
- 8.3 Cabinet Paper 15 June 2023 Report of the Executive Director for Adult Social Care and Health: Proposal to Consult on Changing the Charging Policy for Local Residents in Receipt of Adult Social Support in the Community

9. **Appendix**

- 9.1 Appendix 1 – Implications
- 9.2 Appendix 2 – Explanation of Terms
- 9.3 Appendix 3 – Benefits Available
- 9.4 Appendix 4 – Consultation Report on Changing the Charging Policy for Local Residents in receipt of Adult Social Care Support in the Community
- 9.5 Appendix 5 – Equalities Impact Analysis
- 9.6 Appendix 6 – Revised Adult Social Care Charging Policy: Adult Social Care Charging Policy for People receiving Adult Social Care Support in the Community
- 9.7 Appendix 7 – Case Studies

10. **Recommendation(s)**

It is recommended that Cabinet:

- a) Following consideration of the full report on the consultation responses received at Appendix 4 to the report and the content of the Equality Impact Analysis received at Appendix 5 approves the changes to the Charging Policy for people receiving Adult Social Care support in the community, as detailed in the recommended Option 2 outlined in this report.
- b) Approves the revised Adult Social Care Charging Contribution Policy for people receiving Adult Social Care support in the community to apply from 15 July 2024.
- c) Approves the procurement through G-Cloud for an external specialist provider to undertake the financial assessments at an approximate cost of £200k
- d) Approves the decision not to apply the 2024/2025 uplifts In April 2024 at an initial loss of income to the Council of approximately £142,000.

11. **Reasons for Recommendation(s)**

The reasons for the recommendation

- a) Adult Social Care has made, and continues to make, significant improvements and efficiencies to the way it delivers Adult Social Care in Derbyshire. This has already achieved efficiencies whilst trying to minimise the impact on our residents and focusing on delivering more independent outcomes to its residents. However,

it is important the Council finds solutions to manage its limited resources in ways that are equitable to all current and future users.

- b) The Council would continue to exercise discretion. People would retain 10% of their disposable income to assist with current inflation impacting the cost of living. This option balances the need to continue to assist people, with lower capital and income levels to financially pay for Adult Social Care support whilst generating additional income and ensuring sustainability for the future. A standard £20 disability related expenditure disregard would be applied to all, with the process of applying for further incurred expenses linked to disability or long term health condition being clear and transparent.
- c) This option would ensure people with the lowest amount of income would continue to pay proportionately and only pay what they would be assessed as able to afford. There would be circumstances based on disposable income where some people would, following a financial assessment, continue not to contribute towards their care and support costs.

12. Is it necessary to waive the call in period?

No

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Implications

Financial

- 1.1 The projected income for the financial year is £10.552 with the projected spend on Adult Social Care support being £127.2m.
- 1.2 The estimated annual income generated for the three options is as follows:

	Additional FYE Annual Income
Option 1	£14.299m
Option 2	£11.780m
Option 3	£9.201m

- 1.3 The proposals also contribute to a significant budget pressure reduction of approximately £9m
- 1.4 The above predictions are based on 2023/2024 rates

Legal

- 2.1 Section 1 Care Act 2014 imposes a general duty on the Council to promote an individual's well-being whenever exercising any function under Part 1 Care Act 2014. 'Well-being' is not defined within the Care Act 2014 and is a broad concept. Section 1(2) lists nine individual aspects of well-being as follows:
- (a) personal dignity (including treatment of the individual with respect);
 - (b) physical and mental health and emotional well-being;
 - (c) protection from abuse and neglect;
 - (d) control by the individual over day-to-day life (including over care and support, or support, provided to the individual and the way in which it is provided);
 - (e) participation in work, education, training or recreation;
 - (f) social and economic well-being;
 - (g) domestic, family and personal relationships;
 - (h) suitability of living accommodation;
 - (i) the individual's contribution to society.

- 2.2 Although the well-being principle applies specifically when the local authority makes a decision in relation to an individual, the Care and Support Statutory Guidance is clear that the principle should also be considered by the Council when it undertakes broader, strategic functions.
- 2.3 The Care Act 2014 and the Care and Support Statutory Guidance set out the circumstances in which a social services authority can and cannot charge for adult social care. There are circumstances in which a local authority must meet need (a duty) and circumstances in which it can charge (a power). Accordingly, local authorities are permitted to set local policies that offer more than the *minimum* thresholds in the legislation.
- 2.4 The report includes information that decision makers will need to consider regarding the Minimum Income Guarantee (the MIG) and the Disability Related Expenditure (DRE).
- 2.5 The statutory guidance makes clear that a local authority's policy must be sustainable in the long term
- 2.6. Any proposal to make policy changes as significant as those in the proposed alternatives would require the council to have carried out consultation with the public and those directly affected, including service users, their family/carers, staff and relevant stakeholders.
- 2.7 Case law has established minimum requirements of consultation, which are:
- a) Consultation must be at a time when proposals are at a formative stage.
 - b) Sufficient information must be given to permit a person to "give an intelligent consideration and response";
 - c) Adequate time must be given for consideration and response; and
 - d) The results of the consultation must be conscientiously taken into account in finalising any proposal and provided to the decision maker to inform their decision
- 2.8 In assessing these proposals, the Council should also have regard to the Public Sector Equality Duty (PSED) under the Equality Act 2010.

2.9 The PSED requires public authorities to have "due regard" to:

- The need to eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the Equality Act 2010 (*section 149(1) (a)*).
- The need to advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it (*section 149(1) (b)*). This involves having due regard to the needs to:
 - remove or minimise disadvantages suffered by persons who share a relevant protected characteristic that are connected to that characteristic.
 - take steps to meet the needs of persons who share a relevant protected characteristic that are different from the needs of persons who do not share it (*section 149(4)*); and
 - encourage persons who share a relevant protected characteristic to participate in public life or in any other activity in which participation by such persons is disproportionately low.
- The need to foster good relations between persons who share a relevant protected characteristic and those who do not share it (*section 149(1)(C)*).

2.10 The methods and content of the consultation were designed so as to fully reflect the needs of the relevant protected groups, in particular older people and disabled people, and thereby enable decision makers to understand such needs and pay the regard due under the PSED as described above. Decision makers should carefully consider the contents of the consultation report.

2.11 The Equality Impact Analysis (EIA) at Appendix 5 has been prepared to enable decision makers to understand issues that were raised during the consultation process and ensure that adverse impacts along with any potential mitigation can be fully assessed, as part of the need to perform the PSED described above. Although impacts, for example on disabled people, may rightly be seen as originating in the national framework ultimately created in legislation, Cabinet members nevertheless must have careful regard to the entirety of the EIA.

Human Resources

- 3.1 None directly arising.

Information Technology

- 4.1 None directly arising.

Equalities Impact

- 5.1 The Council has a duty to recognise and mitigate the impact of any changes it proposes upon people in protected groups. The proposals in this report affect people who are currently in receipt of social care support in the community.
- 5.2 The delivery of the proposals would have implications for people with regards equalities, but the mitigations proposed have been designed to address these. The national regulations are the driver for the impact on disabled people not the Council in choosing to align closer to the national guidelines. A full Equality Impact Analysis has been undertaken and is at Appendix 5.

Corporate objectives and priorities for change

- 6.1 In the Council Plan 2021 – 2025 the Council states that listening to, engaging, and involving local people to ensure services are responsive and take account of what matter most to people, as being a core value.
- 6.2 The Council commits to work together with its partners and communities to be an enterprising council, delivering value for money and enabling local people and places to thrive, and to spend money wisely making the best use of the resources that it has.

Other (for example, Health and Safety, Environmental Sustainability, Property and Asset Management, Risk Management and Safeguarding)

- 7.1 As set out in the report.

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EXPLANATION OF TERMS

Capital

In general capital refers to financial resources available for use. Examples are savings in banks and building societies, money in current accounts, buildings, land, stocks and shares, etc. When assessing a client for contributions towards community-based care the value of the primary residence is excluded, but any other property is included.

Care & Support Plan Review

When you receive a re-assessment of your needs and you and the people in your life look at whether the services you are receiving are meeting your needs and helping you achieve your chosen outcomes. Changes can then be made if necessary.

Council Plan

Sets out the vision and aims for the Council and how these are going to be delivered through areas of focus and priority projects.

Digital financial self-assessment calculator

A method used to work out how much a person's care and support will cost, based on how much assistance you need with daily living. You will be asked about everything that you might need help and support with, and the calculator then works out the cost of providing that help and support.

Disability Related Expenditure (DRE) Disregard

Some people have to pay for equipment or services or have higher than average outgoings because they have a disability or long-term health condition. These costs may be allowable as DRE when working out how much they need to pay towards the cost of your support arranged by the Council. The council proposes to allow a standard £20 per week for these costs in all cases, but if the client feels this isn't enough to cover their DRE, a higher amount may be allowed based on an individual assessment.

Disposable Income

The amount of money left after the Minimum Income Guarantee and DRE amounts have been deducted from the client's overall income.

Financial Assessment

The process where the person's income and expenditure is assessed to calculate the amount of disposal income available against which charges can be levied.

Income Maximisation

Aims to help you achieve your maximum possible entitlement to welfare benefits.

Minimum Income Guarantee (MIG)

Local authorities must ensure that a person's income is not reduced below a specified level after charges have been deducted. The amounts are set out in the Care and Support (Charging and Assessment of Resources) Regulations. The purpose of the minimum income guarantee is to promote independence and social inclusion and ensure that they have sufficient funds to meet basic needs such as purchasing food, utility costs or insurance.

Prevention

Any action that prevents or delays the need for you to receive care and support, by keeping you well and enabling you to remain independent.

Preventative Services

Services you may receive to prevent more serious problems developing. These services include things like reablement, telecare and befriending schemes. The aim is to help you stay independent and maintain your quality of life, as well as to save money in the long term and avoid admissions to hospital or residential care.

Short term Service

A way of helping you remain independent, by giving you the opportunity to relearn or regain some of the skills for daily living that may have been lost as a result of illness, accident or disability. It is similar to rehabilitation, which helps people recover from physical or mental illness. It includes a service for a limited period in your own home that includes personal care, help with activities of daily living, and practical tasks around the home.

Tapered Charge

Where a client has been assessed to have disposable income under the standard Co-funding charge of £51.07, a reduced or tapered charge will be levied in order to comply with the MIG. Dependent on the level of income available this will be between £2 and £51.07 per week (we do not charge clients whose assessed contribution is under £2 per week).

Tariff Income

Tariff income is the term used to refer to notional income charged against capital. Tariff income is charged on a sliding scale and, for the revised Co-funding proposal, the council would use the levels set in the charging guidance issued by the DHSC (Care and Support Charging and Assessment of Resources) Regulations 2014), of £1 per every £250 of capital over £14,250. Tariff income does not represent the amount of interest earned from capital.

The Care Act

A law passed in England in 2014 that sets out what care and support you are entitled to and what local councils have to do. According to the law, councils have to consider your wellbeing, assess your needs and help you get independent financial advice on paying for care and support.

The Care and Support (Charging and Assessment of Resources) Regulations 2014

It gives the Council the power to charge adults for care and support. This applies where adults are being provided with care and support to meet needs identified under Section 18, Section 19 or Section 20 of the Care Act 2014.

Wellbeing

Being in a position where you have good physical and mental health, control over your day-to-day life, good relationships, enough money, and the opportunity to take part in the activities that interest you.

Universal information and advice

Information and advice that is available to everyone in your local area. This should cover what care and support services are available in the area, how you can get these services, where you can find financial advice about care and support, and what to do if you are concerned about the safety and wellbeing of someone who has care and support needs. Councils are required by law to make information and advice available to everyone, regardless of who pays for the care and support you need.

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Current Benefits provided to support Older and Disabled People

- Attendance Allowance: Can be claimed by anyone over the state pension age who requires support with personal care (including self-funders). There are two rates £61.10 or £101.75
- Disability Living Allowance: a payment to help with care and mobility needs if you're living with a long term disability, this is being phased out and replaced by Personal Independence Payment only those born prior to 8 April 1948 remain eligible.
- Personal Independence Payment: can be claimed by those under the state pension age with a long term physical or mental health condition or who are disabled. Two components:
 - Daily Living Component – standard £61.10 enhanced £101.75
 - Mobility Component –standard £26.90 enhanced £71.00

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Consultation Report on Changing the Charging Policy for Local Residents in receipt of Adult Social Care Support in the Community

1. Purpose of the Report

A report was presented to Cabinet on 15 June 2023 which sought approval to launch a public consultation, including consultation with local residents and their carers/ families who are receiving Adult Social Care support in the community on:

- a) Three options concerning a proposal to update and change the current Co-Funding Charging policy for Adult Social Care.
- b) The current Disability Related Expenditure process

Following Cabinet approval, the public consultation took place between the 3 July – 4 October 2023. This report summarises the views and opinions submitted by all the respondents during this period.

2. Methodology and Approaches

The consultation used a quantitative and qualitative approach to gather people's views about the proposed changes.

Officers enabled as many people as possible to take part by offering a range of ways in which they could share their views:

- a) Media releases were issued during the consultation and news releases were published on the Derbyshire County Council website.
- b) All current residents receiving Adult Social Care support in the community and their financial representatives (formal and informal) received an initial letter detailing the proposed changes to the charging for the service.
- c) Within this initial letter there was a printed version of the questionnaire, with a pre-paid envelope and explanatory information to help the recipient understand the proposals and how they may impact on them.
- d) There was also an invite to one of five online or six face to face meeting across Derbyshire.

- e) A questionnaire was available in different formats.
- f) A specific Derbyshire Consultation webpage was established, detailing the proposals and to enable completion of the online questionnaire.
- g) Opportunity to write to the council via a letter or dedicated email address.
- h) Additional colleague resources were deployed in the Stakeholder Engagement and Consultation team to ensure telephone interviews could be offered for those people having difficulty completing the questionnaire.
- i) An online calculator was developed so that respondents had the opportunity to input their personal financial circumstances and know how each proposal might impact them.
- j) This online financial calculator offer was complimented by the option to have a phone call from a finance specialist to assist with completing.
- k) A further letter was sent during the consultation to remind people of the closing date and inviting them to a further 7 meetings (both online and face to face).
- l) A British Sign Language (BSL) video was uploaded onto the Derbyshire County Council website describing to the deaf community how to get involved with the consultation.

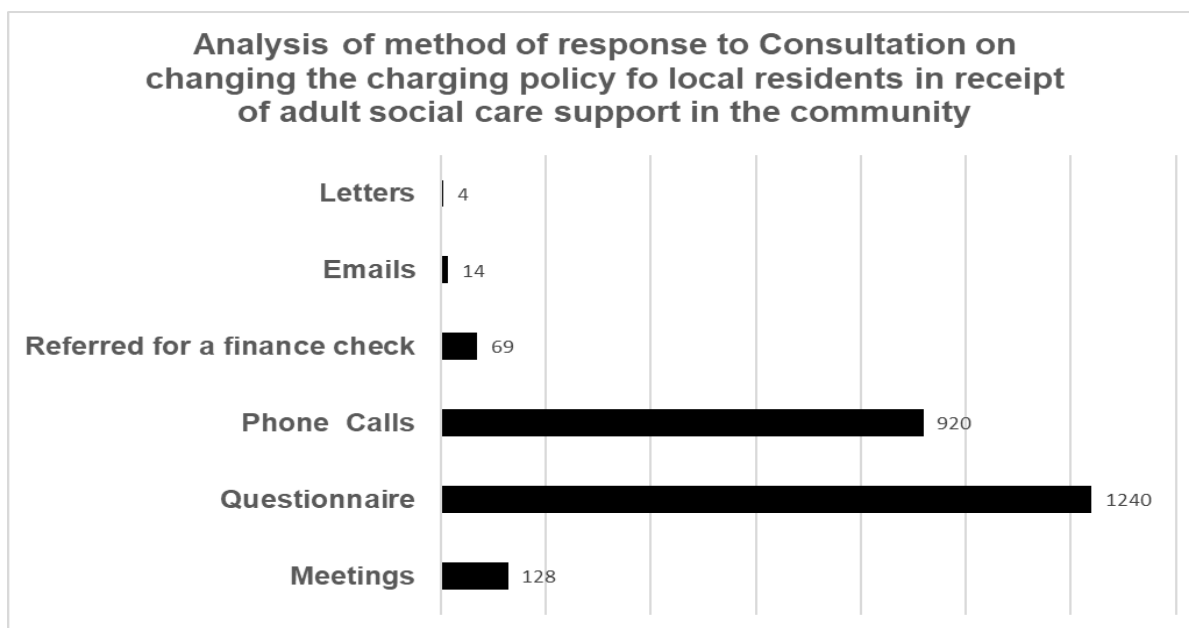
3. Qualitative Approach

There were 3 distinct approaches to the analysis of the qualitative material.

- a) Information gathered during face to face and virtual meetings.
- b) Information gathered from letters, emails, and telephone calls.
- c) Qualitative information contained in the online and paper questionnaires, both the standard and easy read versions.

4. Summary of Themes

In total 2375 people responded to the consultation. The following graph shows a breakdown of the methods used by the respondents to engage in the consultation.



The responses highlighting the same issues were themed. In the contents of this report, we have provided examples of the themes with 10 or more comments. All the themes are listed as follows alphabetically:

- **Agree with proposal**
- **Alternative suggestion**
- **Calculator – Better Off Derbyshire Calculator**
- **Complexity of consultation**
- **Data**
- **Disagree with proposals**
- **Distrust in consultation process**
- **Making the choice to stop care due to financial implications of consultation**
- **Mistrust of Derbyshire County Council**
- **Negative impact on clients and carers**
- **Negative impact on personal finances**
- **Quality of care**
- **Validity of consultation.**

5. Qualitative analysis of the Letters, Emails and Telephone Calls

- 14 emails were received stating people's response to the consultation proposals.
- 920 phone calls were received with 73 of these phone calls from respondents who wished their feedback to be recorded via the telephone.

- 4 letters were received.

The following are the themes emerging from the 95 comments captured from these:

The top theme with 34 comments was “**Complexity of the Consultation**”

Examples:

- "Stroke 7yrs ago. Stated that he has been trying to understand the form for over 3 hours, was shaking and panicking. Thanked me for explaining and said a cloud had been lifted once we finished the online version. Thanked me for being calm and understanding of his speech and confusion."
- " Got given letter from friend asking what it meant. He is not surprised, he thinks most difficult questionnaire to fill in he has ever seen, how anyone even with a slight learning difficulty is supposed to understand is beyond him."
- "Documents quite complex and difficult to understand. Glad of telephone support."
- "Questions too complex."
- "Stated she is disgusted that this would be sent out and that a simpler shorter questionnaire would have been more suitable. Said that whoever put this together clearly hasn't sat down with an actual person and gone through it with them. Said she is too busy to fill such a ridiculous form in and said that people will not reply as its too complicated and the council will take that as people not being bothered and do what they want regardless."

The second theme with 24 comments was “**Negative impact on personal finances**”

Examples:

- Caller thinks the changes are terrible, her mum doesn't have much but will now have even less. Her mum has managed to save a bit through her life by being careful but now will have to spend it on care, it's not fair the people who have not got anything carry on same or the people with lots will hardly be affected.
- Caller stated that she knows the council have already made its decision and just needs members of the public to tick boxes and agree. Has stated that if we put up the Co-funding her dad pays, they will cancel his care. She is appalled that people have paid into the system all their lives and now the council are trying to squeeze every drop out of them.

Annoyed that people who have never paid into the system will get away with paying nothing.

- It won't leave her or her mum enough to live on. Says her mum will never afford to be able to leave the house.
- Very grateful for the care she received from DCC in the past, is hopeful other people will be able to receive it in the future. These letters are scary and hard to understand and hopes this won't put people off asking for care when they need it. Understand the council has costs and needs to make saving but taking off people who have so little is very harsh. Not had a penny off the council all my life, and if I was to need it now would have to pay a lot towards.
- Whilst I understand the need for the council to seek to alleviate the very high costs of Adult Social Care, I am concerned at the very high costs to be borne by some residents who are far from well off, and the impact of the new charges on their living standards.

The remaining comments were regarding:

- Data - 8
- Alternative suggestion - 8
- Compliments – 4
- Better off Derbyshire Calculator - 3
- Disagree with proposal – 3
- Mistrust in Derbyshire County Council – 3
- Agree with proposals – 2
- Negative impact on clients and carers – 1
- Other (didn't fall into a theme) – 8

6. Qualitative analysis of the meetings

In total 128 people attended the 11 meetings with 301 comments captured. The following is an analysis of the comments which were captured at these meetings:

The top theme emerging was **negative impact on personal finances**

Examples

- "Think carefully about young people just starting out, don't penalise them when they want a life, job, hobbies and holidays like everyone else."
- "I have done the online calculator for my mum, and she could lose a huge amount of income. She may not be able to heat her home as much as she needs"

- “My disposable income and savings are to replace my 20-year-old car or boiler; I don’t want to be rushed by DCC to replace them. If I don’t buy them now you will take the money for care. I want to be able to say when doing my financial assessments that these are things we need and is what the savings are for. “
- “These proposals will push more people into poverty, by your own figures 50% of people will pay more.
These proposals do not take into account the family carers. They are on a low income because they are caring for someone. These proposals affect the whole family’s finances.”
- “My sons electric and water are the same as they are now despite his age of 23 – where they received reduced benefits due to their age – this is not fair on him.”

The second theme emerging with 44 comments was regarding **the complexity of the consultation**.

Examples

- “If you didn’t have the carers, particularly family members supporting people, then all this information would be so confusing. We need support to understand all this financial information. No full-time carer wants to give up their caring role as this all gets too much.”
- “This questionnaire for people with disabilities is just so very difficult to understand – how are they supposed to have their say if it is impossible for them to comprehend the contents of the consultation.”
- “The wording on this consultation is just so complex and confusing – how are we supposed to understand and make our views known if we don’t properly understand the implications.”
- “I am worried about the people who can’t come along to these meetings or make phone calls – that they won’t understand the proposals and be able to have their say.”
- “Carers are not clear on what the proposals are – they are very confusing.”

The third theme emerging with 42 comments from the meetings was regarding **disagreeing with the proposals**.

Examples

- “I don’t want to vote for any of these options – that’s why we put our money on one side so we could have a comfortable retirement – not for you to just take it away in care fees.”
- “I could put Mum into a home as looking at the forecast cost for her care then it will be unaffordable in the future – hope you have 6500 places in your care homes as I am sure there will be a lot of people thinking the

same way as us. We gave up work to look after Mum in our own home and now we are told that she will have these care costs and will have barely a quality of life as she will not be left with hardly anything to live on.”

- “People save for emergencies, a new car, boiler etc, £20,000 isn’t a large sum of money. It is unfair to take these savings.”
- “You are penalising people that have worked hard. £20,000 is such a low amount to people to have to pay for all of their care. The £20,000 would soon go.”

The fourth theme emerging with 37 comments was **alternative suggestion**

Examples

- “Given the overriding concern is long term sustainability, have you looked into making change slower? There could be a phased approach over a number of years.”
- “This may sound simplistic but could you not just raise the care cap.”
- “People who get PIP should have those payments ringfenced and not taken by the council.”

The fifth theme emerging with 25 comments was **validity of the consultation**

Examples

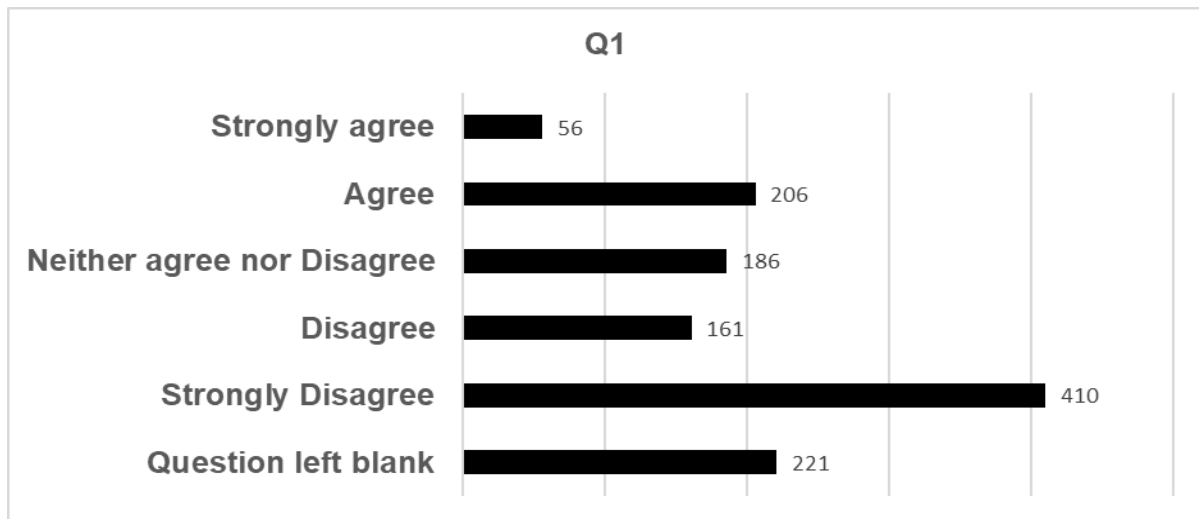
- “You haven’t offered the option of no change in the document.”
- “The fact ‘no change’ isn’t an option on the questionnaire means that it has already been decided.”

The remaining comments were:

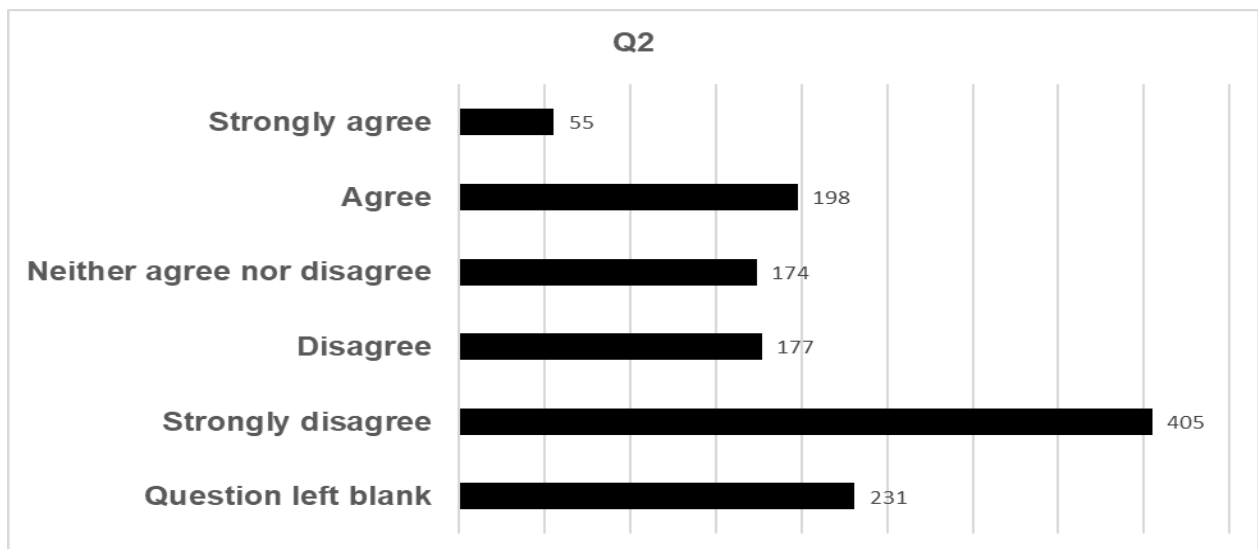
- Mistrust in Derbyshire County Council – 18
- Negative impact on clients and carers – 11
- Other – 10
- Quality of care - 5
- Agree with proposal – 1

The tick boxes on the questionnaire both on-line and paper version were analysed, and graphs produced from the data with the following results:

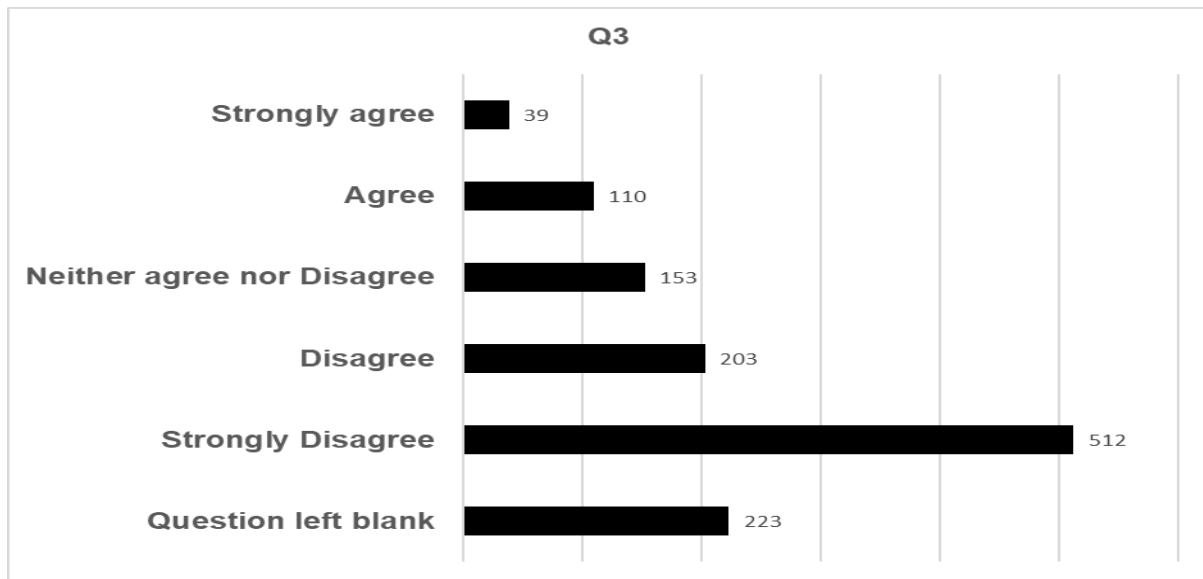
Q1 How strongly do you agree or disagree with the proposals to adopt the national Minimum Income Guarantee rate which would then be used to calculate a person's disposable income?



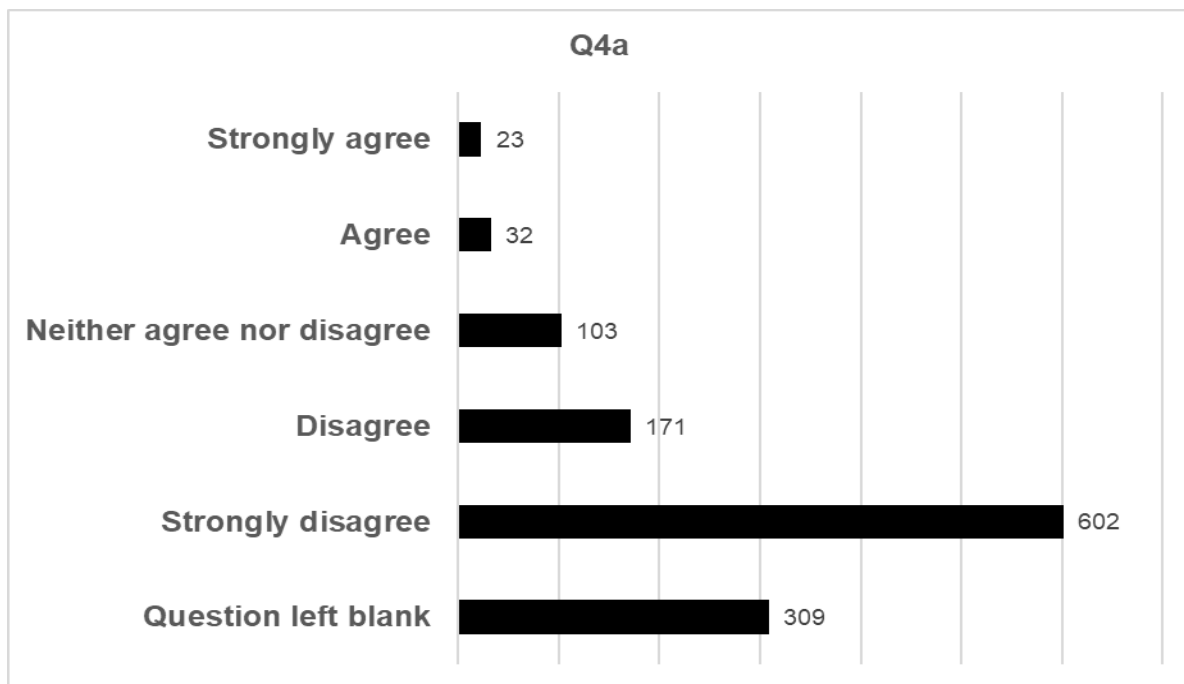
Q2 How strongly do you agree or disagree with the proposal that charges would be based on disposable income regardless of whether or not a person is in receipt of Attendance Allowance, Personal Independence Payment or Disability Living Allowance?



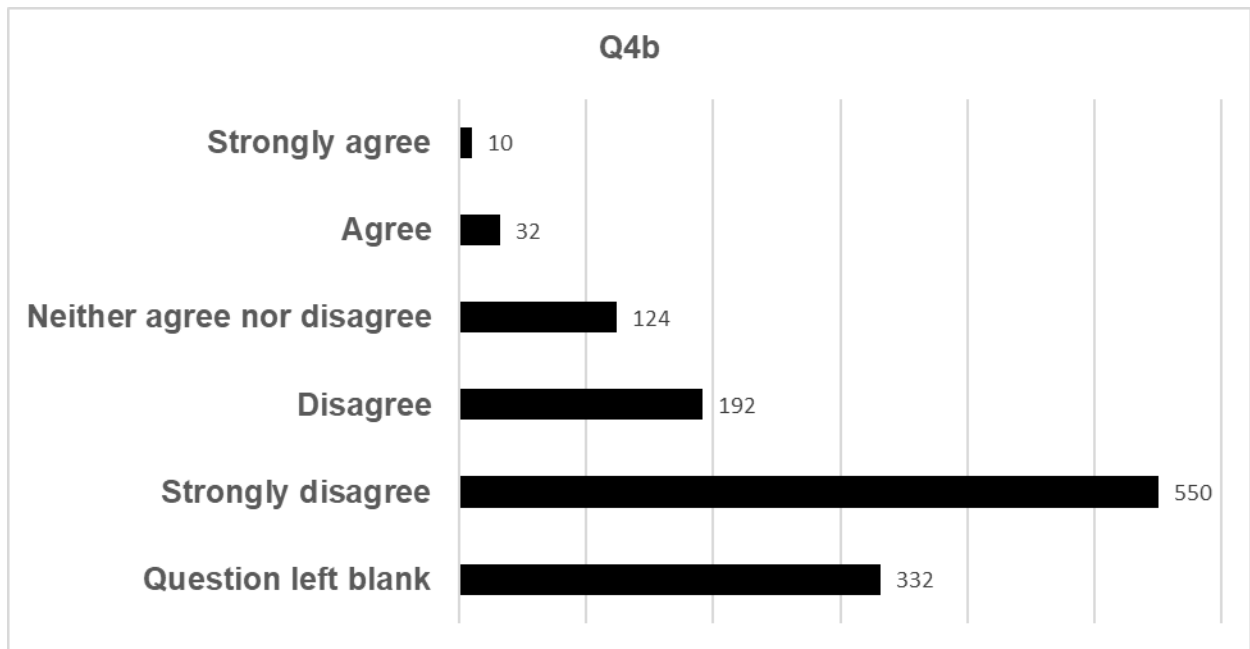
Q3 how strongly do you agree or disagree with the proposal to remove the cap on the standard weekly Co-funding charge, which for the 2023/24 year is £51.07?



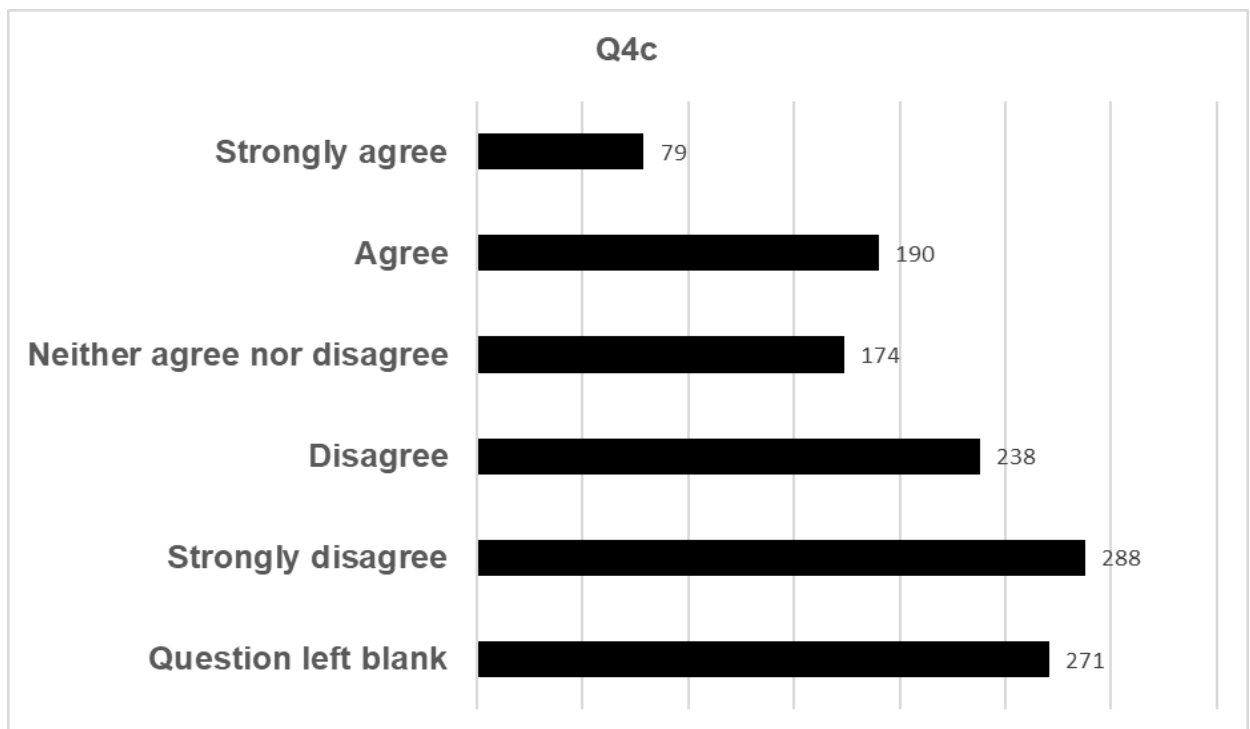
Q4a How strongly do you agree or disagree with the proposals to charge on the following percentages of disposable income - 100% of disposable income?



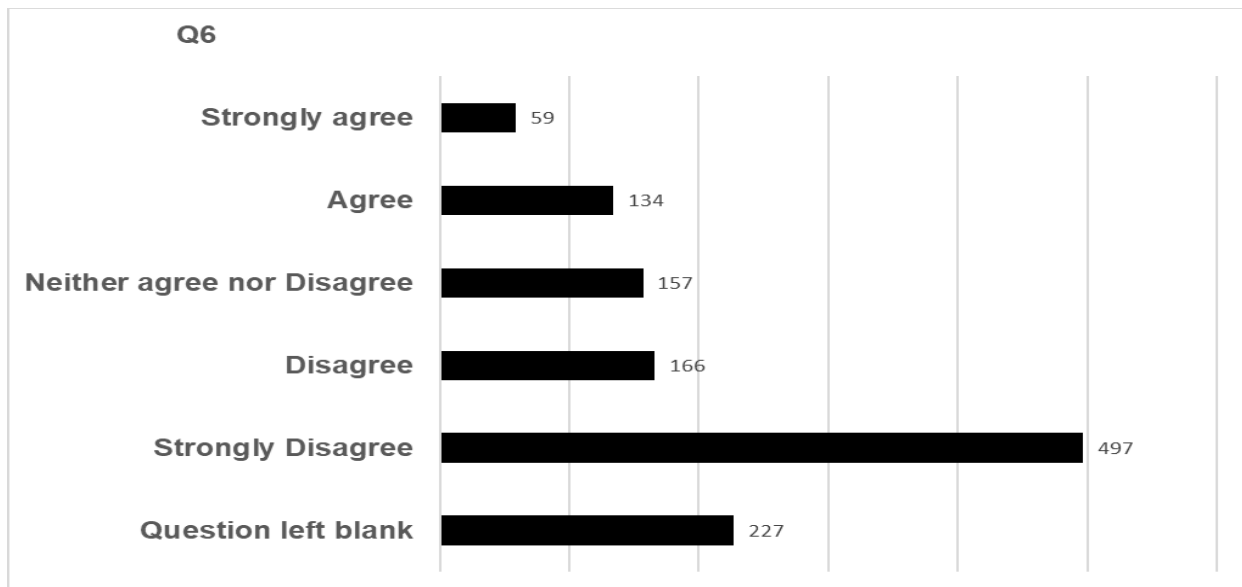
4b How strongly do you agree or disagree with the proposals to charge on the following percentages of disposable income - 90% of disposable income?



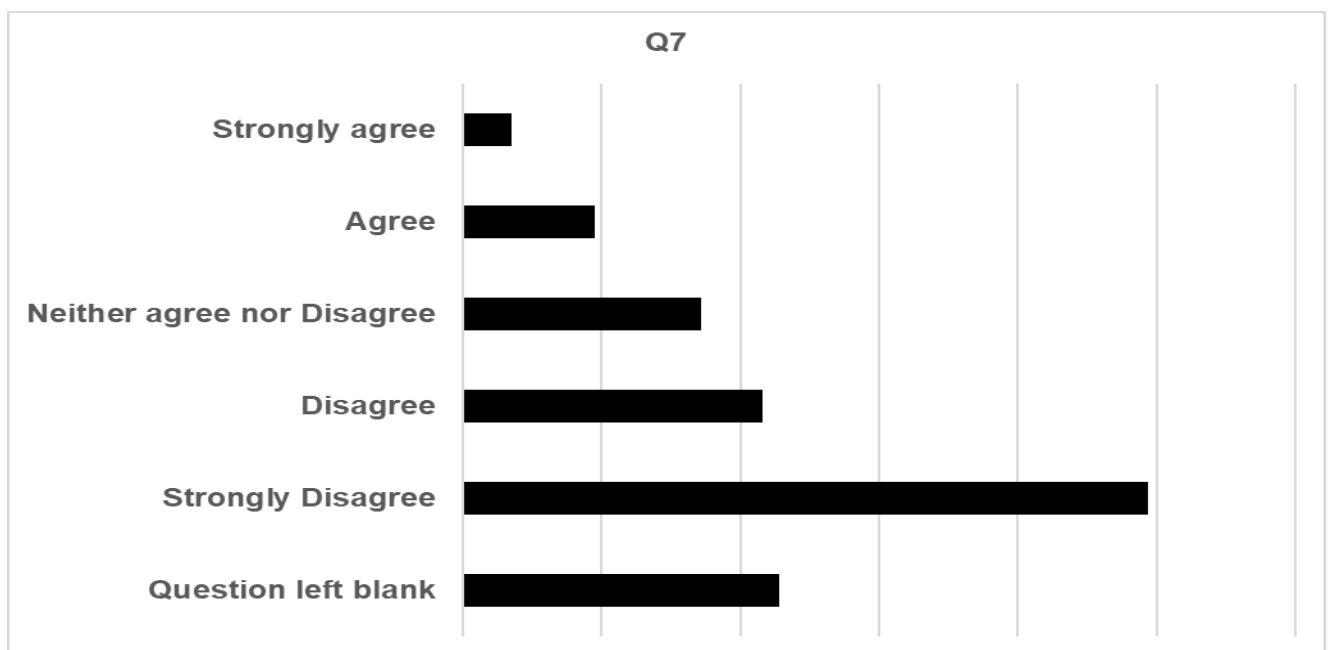
4c How strongly do you agree or disagree with the proposals to charge on the following percentages of disposable income – 80% of disposable income?



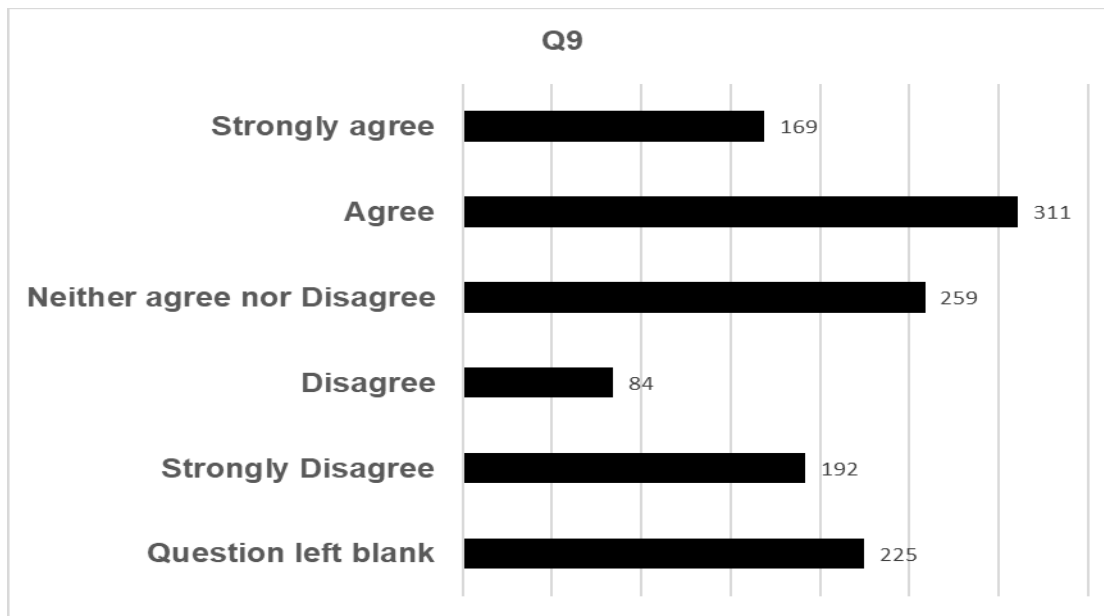
Q6 How strongly do you agree or disagree with the proposal to lower the upper capital assts limit, from £50,000 to £23,250 in savings or assets (not including their main home), when people have to pay themselves for all the care they receive?



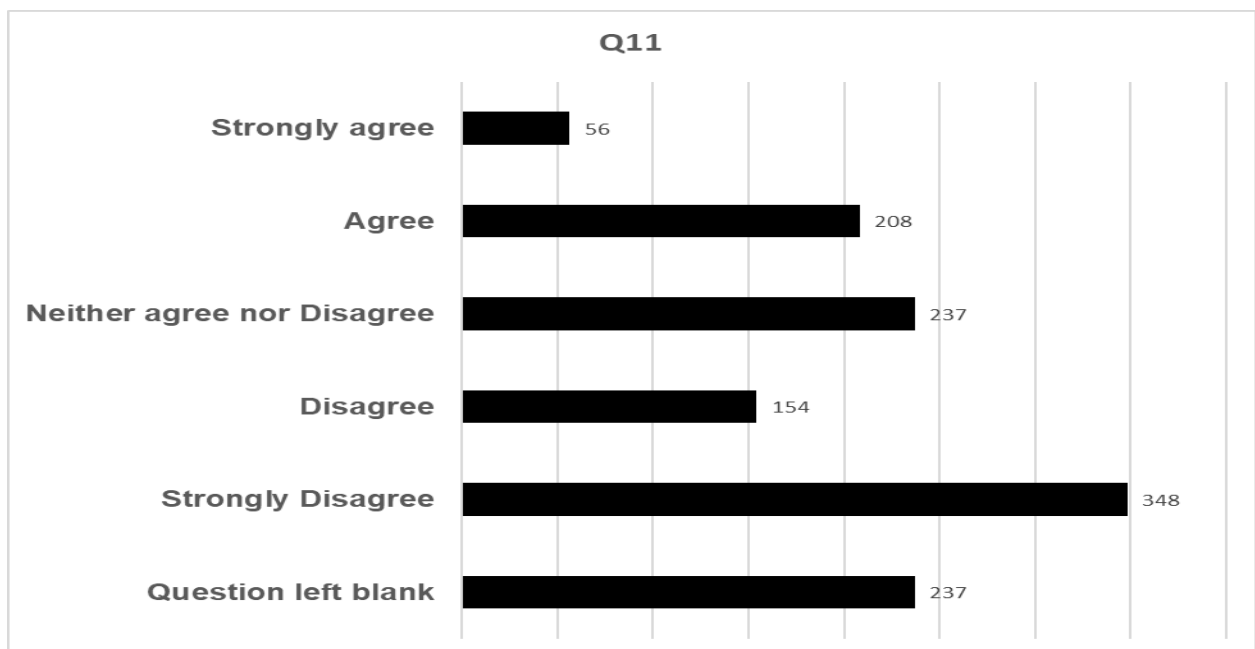
Q7 How strongly do you agree or disagree with the proposal to increase the tariff income arising from capital included within the financial assessment from £1 in every £500 to £1 in every £250 for those with capital between £14,250 -£23,250?



Q9 How strongly do you agree or disagree that the Council should review its current procedure for Disability Related Expenditure, to make it clear what may be considered as disability related expenditure and to enable them to provide evidence in support of an application to seek a higher disregard due to their personal circumstances?



Q11 How strongly do you agree or disagree that respite care charging should be included within the Charging Policy for local residents in receipt of adult social care support in the community, so people would pay based on their capital and disposable income and their individual circumstances?



7. Qualitative analysis from the questionnaire

1240 respondents chose to complete the questionnaire – either online or via the paper version which was sent out to everyone who received the letter. Paper copies were also available on request by telephoning the Stakeholder Engagement and Consultation Team (SECT) who assisted by recording any feedback and/or completing the questionnaire online via telephone. The text boxes were analysed and coded by the SECT in order for themes to emerge from the individual questions. The following are the results:

Q5 If you have any comments regarding how disposable income could be treated under the proposals, please enter these below:

Overall, 265 comments were captured under this question with the top theme with 98 comments being **negative impact on personal finances**.

Examples

- “The most vulnerable in society are once again being selected as easy financial targets.”
- “We are struggling to pay bills now (utilities) and do not get wage rises e.g (up to 27% some are asking. Its more burden on pensioners who are unpaid carers.”
- “Percentages are too high (way too high) cost of living expenses have increased so much that disposable income has reduced significantly. It may get a point that i cannot afford to keep my disabled son living with me and have to consider full time care - an additional cost to adult services!”
- “Taking more disposable income from people will lead to more people falling into poverty which's means more use of food banks, discretionary fund etc. It will also result in some vulnerable people refusing care as they will feel they can't afford it or are causing their partner/family financial hardship. Social care should be free at the point of need as the NHS is and this should be done by increased taxation at a national level.”
- “It is disgusting that you are introducing proposals that will make over 70% of the elderly receiving adult care worse off, it's bad enough with the cost of living rises, energy costs rising, food costs rising that you are proposing to take more money from the elderly.”
- “I can only just about afford the current capped Co-funding amount. After filling in the calculator I will be paying more. My DP helps me to have assistance to attend hospital. If the Co-funding charge is increase i won't be able to afford this support and would not be able to go to appointments.”

The second theme with 75 comments was **alternative suggestion**.

Example

- “I think only a small amount of disposable income should be considered 20-30% at most.”
- “65%-70% of disposable income as a maximum seems more reasonable. What happens if your disposable income isn't much to begin with?”
- “I think the move to any of these arrangements in one move will likely cause distress and hardship. Your current scheme is particularly generous” service users will notice a huge change in the amount they are charged. Could you consider a more staged or staggered approach?”
- “The reduction in the capital allowance from £50k down to £23,250 is too big a step. This adjustment should be done over say 2-3 years.”
- “Disposable income assessment should take into consideration all potential expenditure that helps improve quality of life as well as things like clothing etc.”

The third theme with 66 comments was **disagree with proposal**.

Examples

- “Individuals that have worked all their lives and been cautious with their money should not be penalised for having savings. Everyone should be given the same.”
- “Obviously, people will opt for option 3. Who's going to ask to pay more??? Why isn't there an option 4 - leave things as they are. Elderly and disabled people are always discriminated against.”
- “I believe that with the present cost of living that £14,250 is dangerously low to start relieving people of their capital.”
- “Cost of living increases over time- it does not diminish. The £50k limit should stand. To reduce it takes even more of the assets any disabled person has acquired.”

The fourth theme with 16 comments was **complexity of the consultation**.

Examples

- “I honestly do not completely understand this.”
- “An old person would not be able to understand the proposals. Unable to get on your website to find out more information. The proposals are too complex to follow for 99% of the population!”
- “I'm really struggling with this form I don't understand half of what's being asked, and we certainly don't have that kind of money.”

The remaining comments were:

- Other (not falling into a theme) – 5
- Negative impact on client and carer – 2
- Agree with proposal – 3

Q8 If you have any comments regarding how capital would be assessed if these proposals are adopted by the Council – please enter these below:

Overall, 175 respondents chose to answer this question with the top theme with 76 comments being **disagree with proposal**.

Examples

- “This completely penalises people who work and save - instead encouraging people to not work and to spend what they have. Each council should have the power to set its own limits/ values not take the national.”
- “Just another attack on people who have worked hard and saved their money. People who have not worked or spent all their money don’t pay anything.”
- “I don’t believe that peoples hard earned savings should be taken into account and that people should be penalised for having been responsible and saved money for retirement. We have the highest levels of tax ever and social care should be funded from this. Looking after the elderly should be the first priority of any civilised society.”
- “Unfair that married couples can have saving at 50,000 when a single person (23,500) may be more in need of savings.”
- “You cannot assume a fixed rate of tariff income unless you are sure this could reasonably be achieved under any circumstances. Investing capital in say a fixed term ISA does not produce income until maturity so having to pay tariff income assumes an ‘income’ which surely limits investment opportunities?”
- “Why should I pay more. When there are thousands who don’t pay anymore. There is something wrong with the system.”

The second theme with 46 comments was **alternative suggestion**.

Examples

“Anyone receiving help with care should’ve been made more aware of benefits that they are able to claim. As I wasn’t aware of disability related expenditure.”

- “Take living costs into account such as board/rent.”

- “It should be changed gradually not all at once.”
- “If you are co-funded- the proposed charges are too great. Can't Derbyshire have a limit midway between 50k + 23500? i.e., 36,750 at 35,000.
- “I think that allowing people to previously build up savings to £50,000 and to now take it away is unfair. The council should also take into consideration that some people have savings to enable them to pay for equipment or large items i.e., an adapted vehicle or wheelchair that cost large amounts of money and aren't provided by any other means.”

The third theme with 32 comments was **negative impact on personal finances**.

Examples

- “These proposals do not address all the extra costs, outside dcc provision that disabled people face e.g., taxi's, dietary requirements, transport to more appointments, cost of medication.”
- “If you save for things your penalised being disabled, I desperately need a new kitchen to help me become more independent but that will not be considered!”
- “The disabled and vulnerable in society have little reserve in their benefits in a cost-of-living crisis to cope until the proposed reductions. It is immoral and irresponsible.”
- “I am concerned that people are already dipping into savings to pay for additional health services - particularly hearing services, assistive technology aids, wheelchairs, mobility scooters etc. £23,500 doesn't go far especially if people are in own homes + may need to pay for new boilers roof repairs etc.”

The fourth theme with 10 comments was **complexity of consultation**

Examples

- “Increasingly difficult to understand these questions.”
- “More clarity is needed regarding 'evidence'. What exactly would be required? Is this just another way to make claiming difficult and a way to deter potential claimants?”
- “Most parents/ carers who I have spoken to do not understand this form and feel threatened by it.”

The remaining comment were:

- Agree with proposal – 7
- Quality of care – 1
- Other (did not fall into a theme) - 3

Q10 If you have any comments regarding how Disability Related Expenditure would be treated under the proposals, please enter these below:

Overall, 165 respondents chose to answer this question with the top theme emerging with 53 comments being **alternative suggestion**

Examples

- “I believe a standard charge would make admin easier and probably be more cost efficient.”
- “Disability disregard should include all additional costs which are expected to be borne by the disabled person. For example, a wheelchair adapted vehicle costs the user in excess of £1000 per year, in our experience.”
- “Thinks it should be made clearer to clients and they should be given the information as if they don't know about it, they wouldn't know to ask.”
- “The council needs to actively enable people to claim DRE with dedicated officers, and no additional care charges should be introduced for any individual without an assessment of their DRE and additional benefits.”
- “Look at people’s circumstances increase amount to £35. £20 is too low for disabled people needs to be £35.00 much more realistic. We know some people will say much higher amounts. You have to be realistic.”
- “Assessment of a disabled person’s needs should be done face to face by experienced health experts and require evidence. A generic questionnaire cannot possibly ensure a fair assessment.”

The second theme emerging was **negative impact on personal finances**

Examples

- “£20? With the cost of living so high is a joke.”
- “£20 disregard is ludicrous, with heating bills and food bills rising people have to choose between heat or eat or having carers in. £20 doesn't go far, maybe senior officers and councillors may want to try a month in the shoes of an elderly person who needs care.”
- “Given increased cost of fuel. Other items, I feel £20 pw is on the low side. My housebound relatives heating costs are particularly high. Some people may not have the support to collect evidence and apply for a higher disregard, so you should not make the process too onerous.”
- “People with long term disability are more unlikely to manage their heating and appliance themselves. They have more washing, need more heating and a healthy diet.”
- “People have extra needs they should be allowed extra money.”

The third theme emerging with 34 comments was **disagree with proposal**

Examples

- “This proposal is both mean and callous and wholly discounts the difficulties many people face in life.”
- “When initial assessments were done for my severely autistic son were carried out, the forms and hoops we had to jump through were exhausting, repetitive and sometimes dismissive and lacking empathy, treating people in this manner is appalling, so to suggest further reviews as to how disabled someone may be is wrong.”
- “You are making disabled people who need care into even more of a stigma and having to jump through unnecessary and humiliating hoops. I am disgusted.”
- “This is an attack on the disabled again!”

The fourth theme emerging with 21 comments was **complexity of consultation**

Examples

- “I don't understand the £20 question.”
- “I am educated to degree level and have no idea what this question means.”
- “Find these questions difficult to understand.”

The fifth theme emerging with 10 comments was **agree with proposal**

Examples

- “The proposal seems fair in the fact that people with a genuine need should still be able to get the help that they need.”
- “As long as it is transparent and fair it should be fine.”

The remaining 2 comments did not fall into a theme and were classed as other.

Q12 If you have any comments regarding how respite care changing would be treated under the proposals, please enter these below:

Overall, 174 respondents chose to comment on this question with the top theme emerging as **disagree with proposal**

Examples

- “Yet again, it is unfair to charge people differently for the same care. You are forcing massive issues on a very small proportion of the community who are extremely vulnerable.”
- “Respite is a need, not a luxury, not a want. I don't need or want to go to turkey. I do need respite to provide me and my carer a break it's a prescription item and should be viewed as such.”
- “Respite care is an essential break for carers as well as the person being cared for. I think changing the charging policy is going to create a barrier to the respite considerations on a financial basis.”
- “Carers are under constant pressure and need respite. An increase in charges will lead to pressure to minimise respite care to save money. This will be to the detriment of both the carer and of the disabled person.”
- “Fund things properly and care for the most challenged people in society rather than hurting them more!”
- “This does not affect me personally at present but I disagree completely with the proposition.”

The second theme emerging with 40 comments was **alternative suggestion**

Examples

- “I believe the standard weekly amount is a fair approach, but also believe this should be an up to or capped amount at an amount or % over the minimum income guarantee. Being in residential or respite care does not mean that a person has no other expenses. The weekly amount should not take a person under the M I G.”
- “All people should pay same and not have to use savings.”
- “Respite care should be limited to 2 weeks a year for children and adults, but this should be free. this is for families caring for a disabled person.”
- “Charges should be the same for all if they are getting the same care. It's unfair for some to pay more than others because they have earned more money at work during their working lives. They have worked long hours in the past at work which has helped the country in terms of tax etc. They are then punished for working hard throughout their lives. Could looking at the amount they have given to the country throughout their working years be considered? Otherwise, there's no real incentive to work.”
- “If this is arranged in an emergency situation then there may not be time to assess the costs before the person is admitted. Could there be an initial standard cost while the person, their family and/or care workers evaluate the patients' needs/ability to pay.”

The third theme emerging with 22 comments was **negative impact on clients and carers**

Examples

- “Respite is just that, short-term care giving a carer a break or rehab after hospital. Charging for it will put a strain on already burnt-out carers and families.”
- “Respite is an important part of keeping people who care well. Without regular respite, carers will end up having carer breakdown and not be able to cope so the person they care for will end up in full time care.”
- “Respite care is essential for the health and wellbeing of carers, who are already unpaid or underpaid, and whose health suffers as a result of caring responsibilities. 40% of carers die before the person they are caring for. It is inhumane to deprive carers of respite care on the grounds of cost. Most elderly people will refuse respite care if they have to pay so much for it, which fails to help carers at all.”
- “Respite care is already a difficult & emotive subject to raise with loved ones & the new charging proposals would just make it more challenging with the cost more likely to fall to relatives rather than the recipient.”

The fourth theme emerging with 21 comments was **agree with proposal**

Examples

- “It seems fair to charge based on individual financial circumstances.”
- “This has been lapsed for many years and many cases need to be looked into.”
- “If you have a lot of money, then you should contribute more.”

The fifth theme emerging with 15 comments was **complexity of consultation**

Examples

- “Very hard to understand as there is no starting or end figures.”
- “Question is not understandable.”
- “Do not understand!”

The sixth theme emerging with 11 comments was **negative impact on personal finances**

Examples

- “This is something they cannot afford.”
- “Respite is what carers need not the worry of more costs!!”

The remaining 9 comments did not fall into a theme and were therefore classed as other.

Q13 If you have any comments regarding the proposals that have not been captured above, please enter them below:

Overall, 178 respondents chose to answer this question with the top theme emerging with 41 comments as **negative impact on personal finances**

Examples

- “If savings are to be considered - this will be a disincentive for people to save money and more people will be pushed into debt and have to be funded by the state. It is not fair to penalise who have worked hard and made additional provision for their retirement.”
- “Is this proposal just another way to keep disabled people in poverty”
- “Proposals seem drastic! Implemented in one step, some people’s contributions could leap up!”
- “This is a dreadful change, too much too soon. Many elderly people will be unable to pay care costs and heat their homes adequately. The Council should be ashamed to even suggest such a huge increase in costs (6-fold for this household) during a cost-of-living crisis.”
- “The jump from current fees of £51 per week to these levels are unmanageable for elderly people on pensions and are likely to frighten many of them from turning on their heating, eating properly or accessing the care they need to keep them safe. The council should be ashamed that they are even considering such proposals.”
- “I understand there needs to be some changes to sustain adult social care but some of the proposed plans are just too harsh and would leave people struggling in cost of living crisis that we are in.”

The second theme emerging with 40 comments was **disagree with proposal**

Examples

- “I believe that anyone with savings up to £50000 should be left alone. We pay enough at the moment with the high rise in the cost of living.”
- “It is grossly unfair for someone who has worked all their lives and saved a little money to be charged more than someone who has not done either.”
- “You are asking for more money from vulnerable people, at a time when you have just reduced day services and closed day centres for disabled people. Disgusting.”
- “I care for my 93-year-old mother and have done the financial calculator. I am shocked by the results. Based on the 100% option, you will basically take every spare penny of her monthly income. By the time she has paid her costs (electric, gas etc), she will only have £22 per month left over - how is she even supposed to feed herself with such a small amount of cash? I strongly disagree with this proposal. It

is grossly unfair and I daren't tell my mother as it will scare her to death."

The third theme emerging with 30 comments was **alternative suggestion**

Examples

- "I think the current M I G should be retained rather than adopting the national figure, and there should be a % option which is far lower 80% probably 30% there should also be a way to review the care which is being provided and so if we are getting value for our money,"
- "All final decisions should be based on each individual circumstances taking on board costs which may be incurred to help improve quality or life and mental wellbeing."
- "To conclude there should be a graduation of capital assets when being care for in your home. Not parity of £23500. The carer is clearly saving the government, the taxpayer, dcc as to being in care home or nursing home."

The fourth theme emerging with 29 comments was **complexity of consultation**

Examples

- "I am disappointed with this consultation the online calculator provided to enable families to assess the proposed impact of the changes required too much detailed information. I think you could have provided a much simpler tool that would have enabled families to assess the potential impact without performing the full financial assessment. I had more to say - you should have provided a bigger text box for this field."
- "For older people and younger, these questions are very difficult to understand, and we are unable to really fully give people answers. They are frightening to people living on their own."

The fifth theme emerging with 11 comments was **negative impact on personal finances**

Examples

- "If savings are to be taken into account - this will be a disincentive for people to save money and more people will be pushed into debt and have to be funded by the state. It is not fair to penalise those who have worked hard and made additional provision for their retirement."

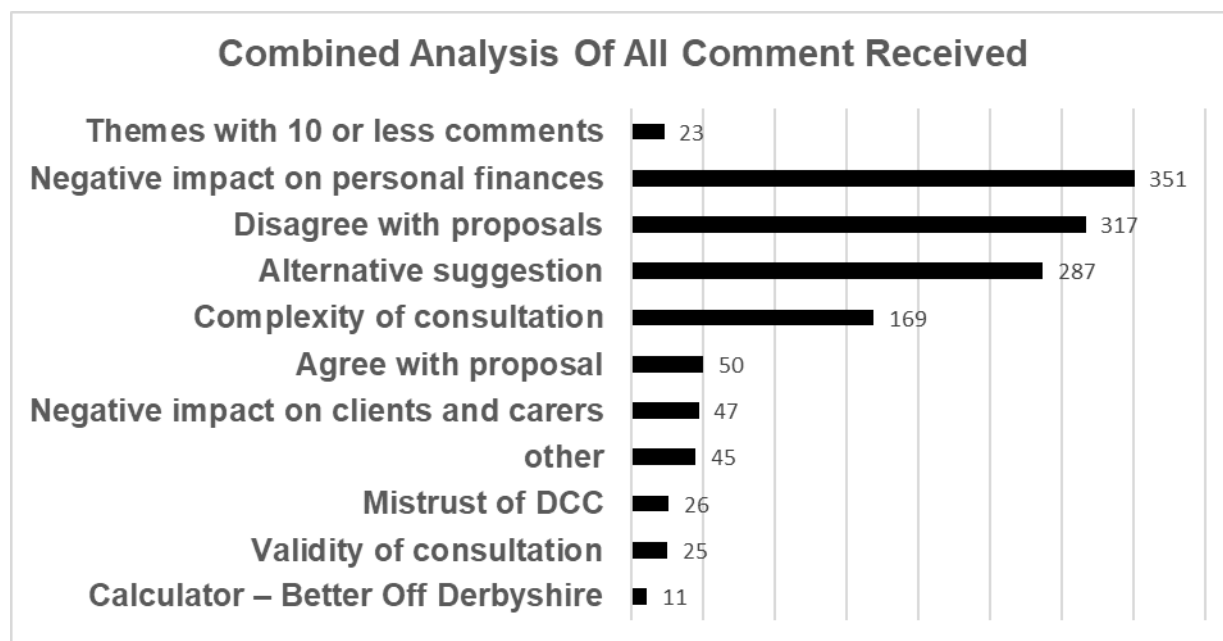
The remaining comments were:

- Agree with proposal – 6
- Distrust in consultation process – 3
- Making the choice to stop adult care services – 3
- Mistrust in Derbyshire County Council – 6
- Other (did not fall into a theme) – 8

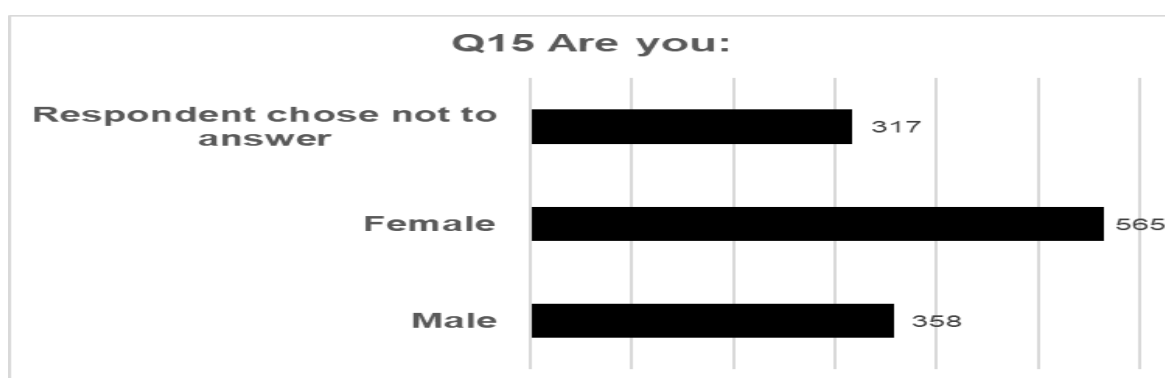
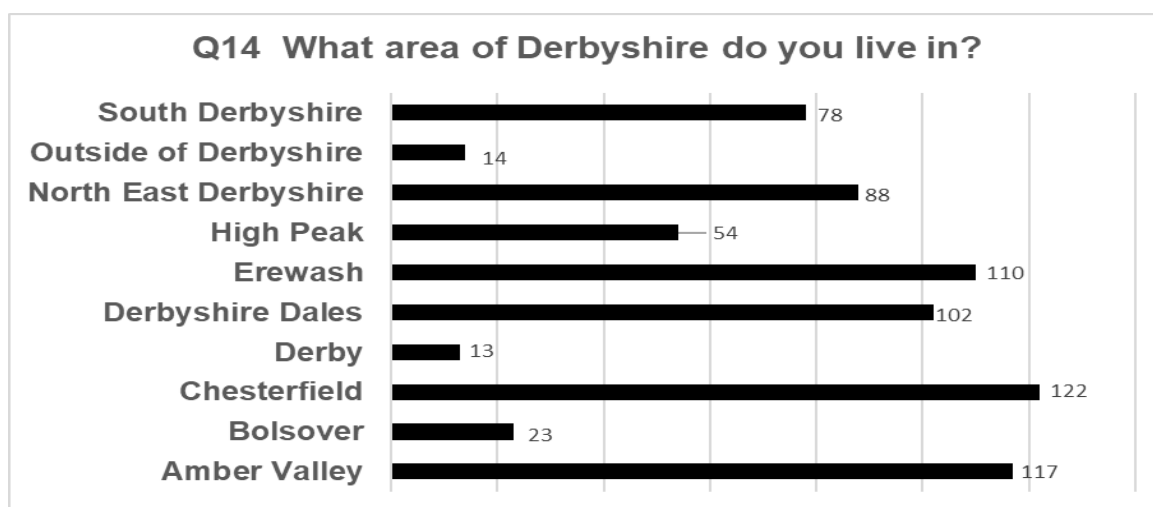
8 Overall Comments

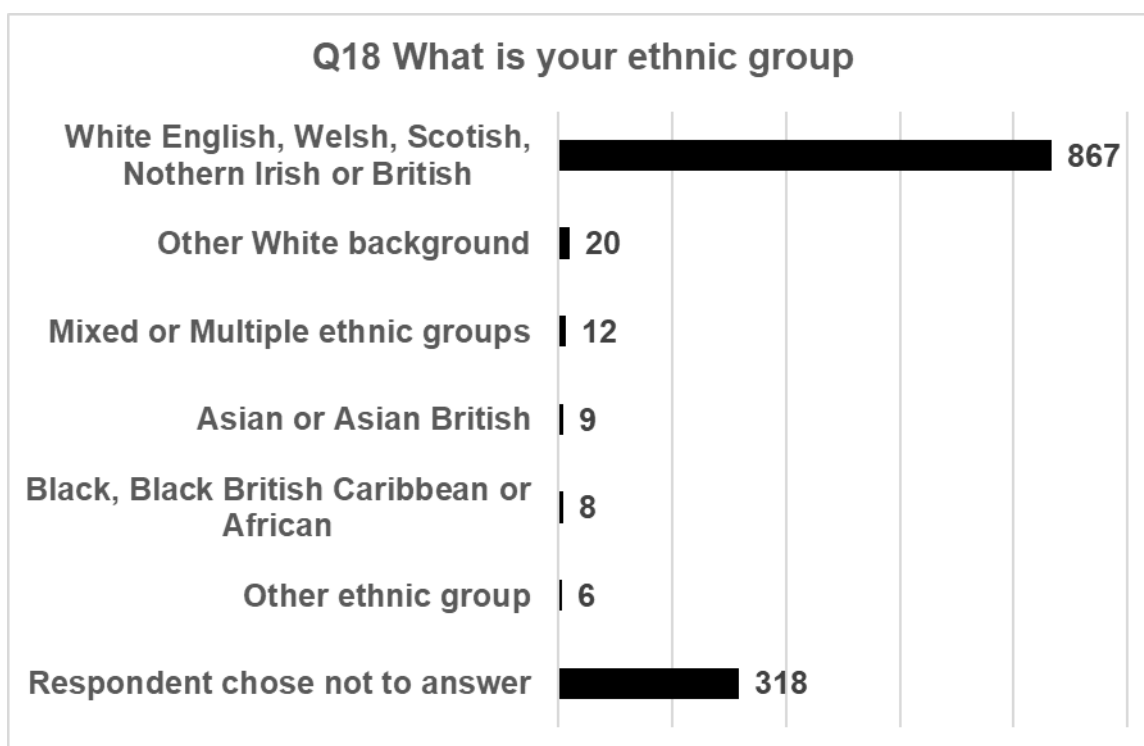
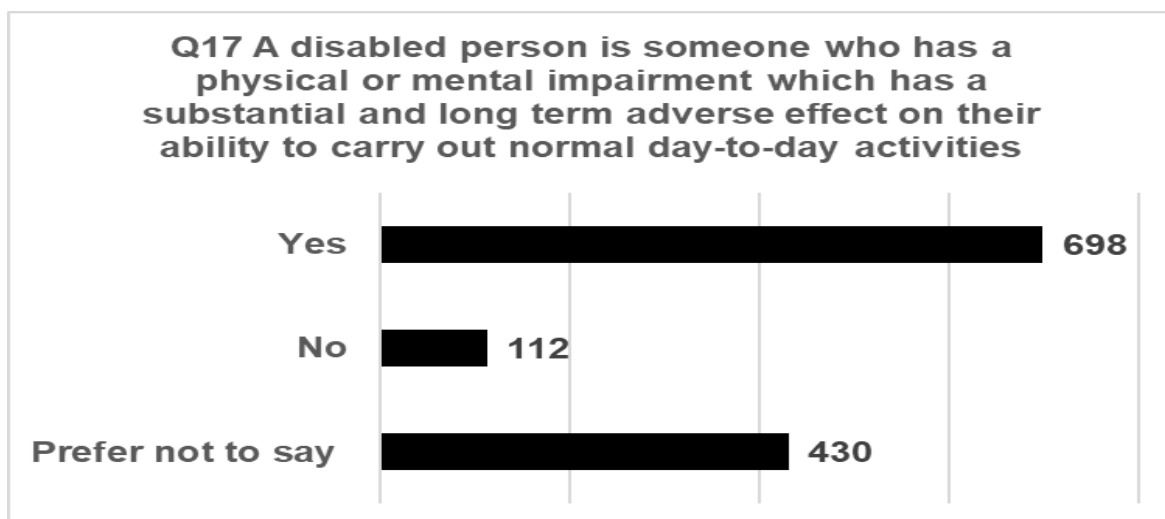
The graph below shows the overall qualitative themes from all **the comments** gathered from the various methods used - which includes questionnaires, letters, emails, telephone calls, and meetings:

All comments received are recorded and must be read alongside this report.



7. Demographics





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List of all comments captured during the from 2023 Consultation on changing the Charging Policy for local residents in receipt of adult social care support in the community

If my daughter was in residential care, then her home and assets would be counted but for people that live in the community only their assets are included. There is a disparity.

My son is in supported living, he already pays a substantial amount of his pip and other benefits to fund his care and extra hours that DCC won't fund. You are wanting to take more money from him. There should be an extra allowance that young people just starting out at being independent and having a life will need to keep more of their income. There should be a different framework for younger disabled adults.

Think carefully about young people just starting out, don't penalise them when they want a life, job, hobbies and holidays like everyone else.

You give substantial sums to residential care providers, and they just expand and expand. That money should go on caring for people with disabilities.

The online calculator, it is not clear that you aren't storing data, this may put off people from using it in case they make a mistake and give the wrong information.

Supported living shouldn't be considered to be different to residential care because it's still 24-hour care in a building

You haven't offered the option of no change in the document

This is a tick box exercise

The fact 'no change' isn't an option on the questionnaire means that it has already been decided

People who haven't got the internet are stuck (accessing information on reports and cabinet decisions)

Document doesn't explain how projections are calculated

The income from co-funding should be ring-fenced to adult social care and not lost within DCC

Given the overriding concern is long term sustainability, have you looked into making changes slower? There could be a phased approach over a number of years

I have done the online calculator for my mum, and she could lose a huge amount of income. She may not be able to heat her home as much as she needs

We've never been told how our son's contribution is calculated. We don't know whether he gets the disregard

The glossary of terms lists buildings and land as a part of capital. Needs clarifying that primary residence is not included

A ruling a number of years ago meant that my son received a large back-payment of 6 years' worth of benefits. This was not intended to be considered his capital. It moves his finances into a category he shouldn't be in. It wasn't our son's fault that he received a large payment. He needed that money years ago, but he didn't get it then

You've sent these letters and worried us. Benefits are the only money our son gets. It is not fair, and it is misleading.

There is no way my mother-in-law who is totally independent would be able to do the financial calculator even over the phone with help

When we've been overcharged, we have had to fight for a refund from DCC

Parents of people with LD are always fighting for our children. There will be lots of parent carers out there who have LD themselves and can't fight for their kids

concerns about one off disability related expenses, such as a wheelchair, and the amount of time it would take to get a decision made about the one-off disregard)

I'm worried people will be using their MIG money to buy disability related things because of time and effort needed to apply for disregard

Costs because of mental conditions and LD are more difficult to measure than physical aids

dubious/mistrust that everyone will get a new financial assessment)

Often "public domain" doesn't mean information will be easy to find

We don't know to ask for more information about things if we don't know they exist in the first place

Letters about other matters could be enclosed with other letters already being sent such as co-founding charge

In my opinion rather than taking money from you and giving money at the same time, we need to encompass the ins and outs as 1 payment. It is inefficient

In one hand and out the other

The sceptic in me thinks that by giving us 3 options (80/90/100%) you've already decided on 80% so that it looks like a better decision than 90 or 100%

Derbyshire has been generous up until now but now you want to offer the bare minimum set by the government. Letting a lot of people down and making the cost-of-living crisis even worse. Shame on the local authority

You are taking from the most vulnerable

unimpressed that they'll have to do the financial review every year

How come we can spend £200, 000 on cameras for recycling centres to make sure people don't come in from other authorities but we need to change this to save money

We are only being informed of this now so they cannot go back to look at our finances from the last 7 years

Everybody's council tax has social care charges included which comes up to way above £2million

Nobody in this meeting wants to see this happen but it will happen anyway so why have the consultation process when it will happen anyway

I looked very briefly at the questionnaire but frankly I am not computer literate enough to do that on a computer or phone

There seems to be three choices, 100%, 90% or 80%. Why would anyone vote for 100%?

Derbyshire was the most generous county but now want to go to the national way. You won't have planned for this. It will have a big impact on you

I don't think you understand the impact this has. We actually looked to move but we made a decision to stay here based on the social care situation. Now if we have to end up paying for all social care it isn't worth staying but it is too late to move

I have been very sceptical about why I am putting all this information into a system where I thought I was getting a light-hearted look at finance. It would be helpful if it said at the beginning that you didn't have to give your actual name or national insurance number. You say that these are proposals but the fact that the financial assessor system is already there puts doubt into minds that a decision has already been made

I think it is scary to hear it like that with what they will take from my money

I have come here today because I have no idea what this will look like and that is scary. I need to know real figures for what could happen

I'd like to offer an option 4 – everybody currently claiming, they do nothing. Then gradually introduce a new system for new claimants. Everyone in this room has different needs. They aren't all equal, so you can't then say you can make it equal

The terms you sign up to when you do the financial assessment online are scary. Something needs to go on there to say you are not signing up to legally commit to something. This system is putting people off from finding out where they potentially stand in the future

My worry is that there are a lot of people who don't have the skills to understand what was sent to them in the letter

We don't have enough social workers to aid people with financial assessments – so this is a concern to me if the proposals go ahead that the support will not be available to guide people through the process

Need to talk through the changes with someone who is an expert as not everyone is on-line and able to carry out the online calculator themselves

Since lock down there is a huge difference in what activities my sister can do as the day centres aren't open to her any longer. This has already impacted on the money she has available to spend and if these proposals go ahead, she will have less money

The consultation needs to be publicised more – perhaps put posters in doctors' surgeries

Meetings aren't very well spread out across the county – we have had to travel here today from Eckington – there should be more meetings local to where you live

You need to have a way of making sure there is some way of recording any anomalies

I need to make sure my son is able to live a reasonable quality of life. I need to know it is fair and just. This is a big responsibility. He gets PIP and I agree that you should contribute to the care you receive – but this needs to be equitable to the amount they have and that their quality of life is not affected. It needs to be a fair and just system

Obviously, Derbyshire County Council is looking to be less generous in their financial support of the vulnerable in the future

The consultation needs to be publicised more

I haven't received anything as a foster carer or a supporter – why were we not written to – if it wasn't for our ex foster son telling us about this – we would not have known and been able to take part in the consultation – it needs to be better publicised

If you are a person who is unable to ever be in employment, you consider their income as chargeable (in response to employment wages being exempt from consideration)

Charges have already increased this year due to inflation raising benefit entitlement

ESA is given to people because they cannot work, but you're taking it from them. If they could work, you wouldn't be able to take their income

People are being reassessed and being given fewer days in day care. We are being encouraged to pay for extra days, but we won't have any money for that

I would hope that Motability car and any transport such as taxis would be counted as a disability related expense and disregarded

Money is being given in one hand and taken away with the other. People are given disability benefits because they need them

The online calculator sounds rigid if it only allows you to select 1 level of ESA. Can this be revisited with Welfare Rights?

Couples where the higher earner needs care could end up in a bad situation if they have separate savings

The consultation information and contents are quite complicated and should have been made simpler for people to understand

Would have been better to have the letters earlier so we could have absorbed the information before coming along to a meeting

The terms are so confusing in the consultation paperwork

As a carer I have not had a copy of the letter and don't understand why – if it wasn't for the person who I look after getting one I would not have been aware of the consultation

-No transport links to Risley – it would have been better to choose more central and easier to get to locations for the face-to-face meetings

DCC are in danger of putting out the message “don't save your money – because if you do and need care then they will just take it off you”

The message to everyone will be spend your money before Adult Care take it off you

My husband fell down the stairs and now requires care. We have been prudent all our lives and as ex government workers took lump sum pensions which could now be taken off us to pay for all our care costs.

The people that have not been prudent with their money and just spent it – are the winners in these proposals – it's us that have worked hard and saved that are the losers

DCC are going to the members with these options to fill the hole in the budget

I don't want to vote for any of these options – that's why we put our money on one side so we could have a comfortable retirement – not for you to just take it away in care fees

If you pay rent or still have a mortgage – the amounts that you will be left to live on are not amounts that are reasonable to survive on – let alone have a reasonable way of life

Someone who is just old needs the heating on – it's not just those who are receiving care. My heating bill alone is over £200 a month

My expenditure would be more that £20 per week – charging the wheelchair up – incontinence pads etc – it all adds up

Mum lives with us at our house – and to me it does not seem fair that you must know all our financial details as well as Mum as we are not getting any care

I could put Mum into a home as looking at the forecast cost for her care then it will be unaffordable in the future – hope you have 6500 places in your care homes as I am sure there will be a lot of people thinking the same way as us. We gave up work to look after Mum in our own home and now we are told that she will have these care costs and will have barely a quality of life as she will not be left with hardly anything to live on

Mum has no capital – so by bringing in all these charges you are making us carers think that we should just put her into a care home

My mum would be in the 53% - Mum does have a life and likes to do things – but is not able to save – if these proposals go ahead, she will just be existing

I cannot go out to work because I look after my mum – I don't know what you think peoples breaking points are – but you are pushing us near it with these changes you are trying to bring in

I help my lady at home, I do everything, cooking, cleaning etc. You are saying you want to change the threshold to £24,000, for people caring at home, the same as for people in nursing care. Caring for someone with dementia in a care home would cost the Council so much more.

The goal posts change with the amount of money you have. If you own your own home, you are likely to have savings to cover things like a new roof, boiler breakdown or general repairs. You are saying that instead people will need to use those savings to fund their care.

People are being penalised if they have savings. It is unfair when people have worked all their lives and they are being asked to use the savings to fund their care.

People save for emergencies, a new car, boiler etc, £20,000 isn't a large sum of money. It is unfair to take these savings.

You are penalising people that have worked hard. £20,000 is such a low amount to people to have to pay for all of their care. The £20,000 would soon go.

This just doesn't seem fair at all.

We started to do the financial calculator, but it looked like we were applying for a new financial assessment, so we stopped. It is very confusing.

I don't have a computer so therefore I am at a disadvantage.

I've tried to do the calculations on paper without the online calculator and worked out that my son wouldn't even be left with enough to pay his utilities.

My disposable income and savings are to replace my 20-year-old car or boiler, I don't want to be rushed by DCC to replace them. If I don't buy them now you will take the money for care. I want to be able say when doing my financial assessments that these are things we need and is what the savings are for.

My mum is in her 90's and we are essentially subsidising her as she doesn't have enough to live on with the rising cost of everything. On paper you may decide she has enough to live on, but she hasn't.

A single person is expected to live off £214.45 – that doesn't go very far nowadays. These proposals will leave people with very little.

People may struggle to claim the relevant benefits. I have concerns it will put more vulnerable people or people on low to moderate incomes in poverty. Not everyone has help with their finances.

People will surely transfer assets to family members to avoid having to use all their savings to fund their care.

These proposals will push more people into poverty, by your own figures 50% of people will pay more.

If people really can't afford the new charges, then I worry what will happen to them.

Think we all need to lobby our local MP's because much of this is due to national policies.

I work in local government, so I understand how difficult it is for local authorities. I have serious concerns that vulnerable people- will be sat in cold, not putting the heating on in order to pay for the extra care costs.

My mum doesn't have enough money to live off now, but she is lucky to have us to help her out, not everyone has this support.

People don't always know what support or extra help is out there. There are different schemes with different companies such as reduced water rates.

There should be an option to do home visits for financial assessments if necessary.

I'm devoted to my lady with dementia, I'm giving up my life to be with her. Changing the thresholds means I'm no better off caring for her at home than I would be if she was in a nursing home. It would be wrong to make the two rates the same. The figures do not equate. It would cost you significantly more if she was in residential care. I do everything for her, and the carers take care of her hygiene needs. You are not valuing carers with these proposals

This is definitely going to happen, the options are charge on 100% of income, save a bit or save a bit more

I don't have an issue with the Council saying you need to raise more income, but this hasn't been made clear. It is peculiar that all 3 options are exactly the same but with two options we get to keep a bit more of our income

These options are so similar, you aren't giving us much choice

What is the point of this consultation, it feels disingenuous as you aren't really giving any options

The DRE Policy is a nightmare, getting a decision takes months, this will get worse when more people are claiming DRE

With more people claiming DRE there will be more bureaucracy and you will need more staff to process these claims. This will reduce how much you make from these proposals

I've not seen anything in the media about this consultation, it might be worth having some information of websites such as Derbyshire Carers

More publicity of this consultation is definitely needed, you could send information to groups such as those supporting people that have had strokes

You haven't made it clear there is a 4th option which is to disagree with all 3 options and go back to the drawing board

People used to get 5 days at a day centre but now they only get two but still pay the same amount of Co-funding

This may sound simplistic but could you not just raise the care cap

This forum and being able to ask questions to have been really useful

I am listening to everything you are saying and wondering if my dad should currently be paying anything at all

Since covid, people aren't using respite services. Services aren't being used therefore you aren't maximising your income

I did not feel the letter and information reads clear that there is an option to not agree with any of the 3 options. My parents certainly did not understand it to be such.

I also feel that the letter doesn't explain that there will be opportunity to suggest possible alternatives that the LA can consider. So, it would be great if this could be made clearer too, even if this is to direct people to come into these forums as this has been fantastic to be part of.

Need to be forums all the way through the consultation

I have read the paperwork and it seems like there is only 1 option that has a sliding scale

I found the document confusing. It isn't clear how the amount is calculated. The letter didn't give enough information for us to give informed feedback

(In relation to somebody's capital regularly dipping above and below the 14k threshold) it would be a mammoth task if somebody with borderline finances had to phone up to weekly to update (meaning for the client and for DCC)

The phrase "charge on" in the letter is a deliberate red herring to put people off. You're trying to throw people off the scent of what you're trying to do

We're talking about saving (the council) money. The cost (to DCC) of individual reviews, financial assessments and other assessments: will you make any savings at all after you've done all of these?

You are talking about people's benefits. The cost of bureaucracy for disabled people

I know the council has to make money. But if my son was able bodied, he would have been able to have a job and save his money to do things he enjoys. Doesn't he have a right to have a life? A holiday? It is no fault of my son's or anybody with a disability. Why should people just exist with just enough to survive? Why should somebody with a learning disability never have any money to live with?

If you move the minimum income guarantee it won't leave enough for people to live with. The cost of living has gone up for everyone.

The proposals need to consider the cost-of-living increase

Is the minimum income guarantee set at the same time as benefits changing? Benefit rates are set 6 months before they come into effect, if the MIG is set at the same time it might not be enough for people to live on 6 months down the line based on inflation

A more even spread of face-to-face meetings would have been better

I'm concerned about PIP being taken into account. It would be unfair to put it in because it's about people's psychological wellbeing

People who get PIP should have those payments ringfenced and not taken by the council

I think most people believe that the decision has already been made.

When Co-funding started it was much lower. The charges keep going up and up even though you are getting extra funding via the council tax precept.

I am already paying more council tax than most people as I am in a band of property, I am getting pretty much nothing for all that money I am spending.

You are getting all this extra money in council tax and yet social care is still struggling.

If you didn't have the carers particularly family members supporting people, then all this information would be so confusing. We need support to understand all this financial information. No full-time carer wants to give up their caring role as this all gets too much.

The information you have sent out is so confusing. What we want is one single point of contact that deals with us and answers our questions. We don't want to pass around from person to person.

You mentioned that you receive money from the council tax precept, but you also get funding from central government specifically for social care.

The bottom line is that this isn't for anyone's benefit. You are consulting because you have been told to save money. You should just be open about the shortfall and how much money you need to raise.

Derbyshire County Council as well as the integrated partnership board have signed up to the living well charter. People don't understand the information you have sent out which has caused a lot of fear and panic. If you are going to get on board with the living well project, then you need to help people to understand this consultation. The language is complex, and it is just too complex for most people.

The way the information has been written is so confusing, we don't understand it, especially older people. You should just have said this is the national policy and we are just going to move to follow that national policy.

You could have been clearer about Derbyshire's position compared to the national policy. Give people the choice between the Derbyshire position or the national policy.

Given that people are struggling to heat their homes, to eat – they are visiting food banks. There is a real worry that these financial assessments will leave people with nothing if they need to replace white goods within their home.

A lot of people already pay for their care out of their PIP so this will really impact on them.

These proposals do not take into account the family carers. They are on a low income because they are caring for someone. These proposals affect the whole family's finances.

It would be cheaper for people not to have care and to struggle on.

Long term older carers can no longer claim carers allowance or pension credit from DWP, so they are already struggling with finances.

You should have extra income as you shut the day centres, you are no longer running these services or running the buildings so that should be extra money in the social care budget.

I think services are already being cut to the bone, I think vulnerable people are being penalised.

There aren't enough social workers now to do assessments and reviews. I've been asking for a carers assessment for years but not got one.

You need to regularly review those that will fall just above the threshold as over time they will become eligible for assistance with their social care.

When my carer leaves, I am alone for 21 hours. If I need to go shopping, to appointments or if I fall and someone needs to come and pick me up, then I pay people as they have had to take time off work to help me. Under these proposals I wouldn't be able to afford to do that so I would be sat at home, going nowhere, and seeing no one, just rotting away until I die.

If people can't afford to have care, then it will seriously affect them.

This is all online, so many people aren't capable of calling someone or using the internet.

It is important to know what your indicative budget is so you know what you will be asked to pay for. We have been asking to see the indicative budget for ages but not had it. If we don't know the budget, it's a guessing games to know what we will be asked to pay.

These proposals leave people with no leeway for essential home repairs.

Transport in Derbyshire is expensive and difficult to find for Disabled people. The infrastructure is just not there. If people have less money to spend then they will have to rely on cheaper forms of transport to get around.

We never know when our co-funding charge is going to leave the bank, so it makes budgeting difficult.

This is a tick box exercise; the decision has already been made.

I would like a one-to-one meeting with someone face to face to discuss the financial assessment, I am happy to travel to Matlock.

If someone suggests making a change then it makes it difficult to comment on these suggestions that aren't already mentioned as proposals – I don't think is made clear in the consultation paperwork

It is not clear that 'other' options may be considered – so I don't think we will be adequately informed to comment on these alternative suggestions during the consultation period

If these proposals do go ahead – everyone will be paying different amounts. I think this will be chaos. I think there should be a cut-off point on the amount you pay. I think you have failed to describe and clarify why you are doing these proposals. It will be interesting to see how many people have taken part and been able to understand what it may mean for them in future care costs.

May people will not know how to get involved if they are not online

Carers are not clear on what the proposals are – they are very confusing

It takes over an hour to do the online assessment. The only people that are going to benefit from this are the council. I will be on minimum income – I may as well be in the poor house

All people using your services need to have more than just the costs for care – you are taking us down to the bare minimum on which you can survive – not live

You are going to make people unreasonably poor with this

I am worried about the people who can't come along to these meetings or make phone calls – that they won't understand the proposals and be able to have their say

It is a big jump (the increase in cost)

You're counting people that don't work and that's all the benefits they get

What is being proposed here is a double whammy

People might receive income from their capital which means they're being penalised twice

What is considered as an essential expense is a matter of opinion. An autistic person might need to buy something not 'essential' but important for their wellbeing

Can the changes be phased in?

People have come from other areas of the country for Derbyshire's adult social care

Not charging on the earnings of people who can work - doesn't that discriminate against people who are unable to work?

If my Mum pays for all her care what rules apply? For example, can we have a PA pay family or other arrangements not allowed by the council?

My Mum has no chance of working she has done her work and paid tax

Seeing as my Mum would seemingly have to pay 52k per year what questions are being asked about value for money & what happens when her money runs out?

Most people receiving substantial care are unable to work. A few can, and they already lose around 70% of their earnings to tax, nics and clawback of

Universal Credit. Rather than discriminating against people who don't work, I see this as not penalising even more people who work.

Someone with a learning disability would really struggle to understand this. Is just not accessible from them

How would someone with a Learning Disability who doesn't have support be able to understand the proposal

These proposals could be huge for vulnerable people – is there a plan to phase these in and give them a chance to adjust

What % of a person's benefits is likely to go? How and when we find out?

You say that no decision has been made yet – you said exactly the same when you consulted on Alderbrook day centre for people with a learning disability - yet you still closed it. I don't believe this process is true as you as saying the same all over again

£50000 is a reasonable amount for people have in savings – to have this reduced and have people pay for all their care until their savings have reduced dramatically – this is just not fair for people who have worked hard all their lives and saved for a comfortable lifestyle.

My sons electric and water are the same as they are now despite his age of 23 – where they received reduced benefits due to their age – this is not fair on him

Under 25's also receives a lower level of Universal Credit so they will be less able to afford higher charges

The exclusion of mobility element benefits is not made clear in the proposals
Is £20 enough given the current costs of electric and gas

We can't be expected to comment in an informed way in our questionnaires on the proposals by the 4 October deadline without this information

Could the upper Care limit be left as it was or just increasing the cap? This would be better if it was considered as an option

Seems to me we are going to get one of the three proposals no matter what we suggest as I feel that with the economy as it is – Derbyshire County Council need the money to continue to provide the services

People are going to have less money – people should get more options than just the three choices – even the 80% is not a reasonable amount

The wording on this consultation is just so complex and confusing – how are we supposed to understand and make our views known if we don't properly understand the implications

People who work who receive care don't contribute their pay that they receive towards their care – I feel that this is important to be kept as people with disabilities that can work should be encouraged to work as much as they want to

Elderly people are more likely to have savings & pensions and save up those with severe disabilities can't earn so why is job income excluded - why are we suddenly at this point. Older generation have planned and saved seems like the council & government have not

I also feel it is indirectly discriminatory that younger people are less likely to have the option to save

What impact would these proposals have on reducing people's assets, so they were forced sooner than otherwise into Derbyshire care homes.?

Considering Derbyshire's demographic, I think the council should be more lenient towards that demographic why does it have to go from 50k to MIG not a middle ground

The £14250 is worth less than it was when the Care Act came in in 2014 – this is just not fair on people who need care who are struggling

People who are just living on benefits – this is just going to make them poorer. My son has “treats” that aren't massive – he may not be able to afford these if this goes ahead

With the cost of living increase it is having an impact on how we live – if this goes ahead it is going to have a massive impact on the vulnerable people who rely on care in the community

The level of heating that could be used to add extra amounts to the disability related expenditure policy could be argued dependent on who is doing the calculation – the carer or Derbyshire County council – this would need to be really clear - as my idea of heating the home and that of the local authority may be different

At Derbyshire – the current charging policy treats people as an individual – under the new proposals you will penalise me for living and supporting my wife who depends on the community care she receives

In the 6/7 years of Domiciliary care the standard of care is the worst it has been. The standard of staff is not what they were. Potentially this is going to see people who need care seeing their contribution for the care rise – and yet

the standard of care is the worst it has been. The standard of staff is not what they were. Potentially this is going to see their contribution rise – and yet the standard of service is the worst it has ever been

If these proposals go ahead will the standard of care also be raised to an excellent/good level?

The standard of care is not what it was – we don't have an allocated Social Worker any longer. The standard of care in Derbyshire doesn't warrant this amount of rise in charging

You are expecting us to pay more for a poorer service!

This is frightening for people with disabilities if it goes ahead – this is really going to affect the most vulnerable

The estimated cost that my Mum would pay if the proposals went ahead are horrendous – they go up so much from what she currently contributes that I thought I had put incorrect figures into the calculator

The council needs to take into consideration that we have to save for things – like an adaptation that is not covered from public funding – this needs to be taken into account as part of the capital we can have

Some circumstances are very different and 20.00 per week does not cover 75.00 per week launderette bill where older pensioners have no facilities, I echo what Adrian has just said about elder disabled in future worse poverty and Helen on carers.

our care for our loved ones is take advantage of by the care system

I am a financial deputy appointed by the Court of Protection for my three adult children who have Down Syndrome and lack financial capacity. I am therefore speaking on their behalf. Whatever option the Council decides on, it should NOT increase co-funding contributions for people on standard state benefits beyond the rate of inflation as annually applied by the benefits agency. Any increase beyond this national rate would erode the spending power of their state benefits by requiring them to contribute more from their weekly income on an ongoing basis than their benefits have been raised. This kind of increase would therefore penalise poor and vulnerable adults whom Derbyshire County Council have a fundamental responsibility to protect and to enhance their quality of life. I would like this comment included in the feedback given to Councillors in your final report verbatim - and in addition I would like to ask the Councillors whether they are comfortable supporting proposals which may reduce the everyday spending power of the most vulnerable adults in their community and impoverish their quality of life still further when they have already borne the brunt of many cuts in their services

already. You should NOT penalise disabled people further. Disability is not something that happens to other people. Anyone can be affected - a road accident, a stroke, or just old age. Councillors, please do the right thing and find the money elsewhere.

the Council are picking on ' soft targets.

The last few years have been nothing but a train wreck in terms of the reduction in service for people with LD and autism in this county. (In the country as a whole too, of course. Austerity has punished the vulnerable) it is quite outrageous that people could be paying more for less.

The survey is not set up for comments to alternatives it is just tick box It would be better to feed in on.

comments box, as it is set up it is like there WILL be change which is worrying

No Carer, based on our experiences over the past 12 years, has any confidence that we are being listened to when we say how hard things have now become. If you propose increases in charging you are rubbing our noses in it. This is unfair, unacceptable and cruel.

I'm sorry to say - I have never found them helpful. Maybe a restructure within the DCC is required to somehow work more effectively.

If it means gaining money for DCC it will be done ASAP that's for sure!

I wonder how we would evidence increased laundering, as part of a family setting.....?

Some of these will be one off or infrequent costs. E.g., we bought an electric wheelchair to try and improve mobility

Thank you for arranging this consultation meeting. However, I am left with the feeling that the local authority has momentum on this one and it is very likely that my disabled daughter will be worse off come what may. The only question is by how much on the choice of other options.

The frustration that we carers are feeling at how wretched the Services have become as a result of over a decade of cuts.

I've done some research into savings people have and many people have a nest egg for emergencies £14,250 – £25,250 is quite a low amount for people to have to pay for their care when times are already difficult.

Our current account, which is joint changes on a daily basis. Some days we will have over the £14,250 and other days we will have less. We attempt to maintain a balance in the account for a shock such as a broken appliance. Many people will always be close to that £14,250 but it will fluctuate.

There are likely to be lots of people currently getting help that have between £14,250 & £25,1250. It would be helpful to have some transitional arrangements for those people.

My relatives worry about saving and providing for their own funerals and like to save for that. These proposals do not make any allowances for funeral savings.

The amount people will pay will almost double. An amount which is a half-way house, rather taking the full amount would be useful for the Council to consider.

I would like the Council to consider an amount between £24,000 and £50,000.

Family finances shouldn't be taken into account even if a person lives with family and can't manage their own finances.

Regular reviews will be needed as finances fluctuate.

If Adult Care accounts for 48% of the whole council budget and you are trying to claw the money back. You should consider looking at residential placements to make sure we get value for money and what we need.

Charging on 100, 90, 80 is going to be more than people currently pay now. It shocks me that my son gets the maximum number of benefits now but even for basic activities such as going out with a carer/PA for a coffee or for swimming it is expensive. Social workers doing assessments don't truly understand how expensive these things are for people who are disabled. You need to also consider that many disabled want to volunteer and give back to the community, but they need support to this, and it costs money.

These proposals are certain to increase old age poverty and disability poverty. I would like the Council to consider much less drastic proposals.

For working parents whose disabled family members don't receive a big enough care package to cover all their care needs. We already pay out extra for them due to the shortfall, so that we can go to work. Consider the impact on carers with these proposals as we are saving the Council money by looking after our loved ones at home. You could consider reimbursing extra care days with the Disability Related expenditure policy.

At the moment there is a £50 care cap. The day centre my mum goes to is a life saver. With these proposals you would take her much needed attendance allowance and we may have to reduce how many she attends. We are helping you by caring at home but with these proposals we may no longer be able to afford to care.

The capital and assets review makes sense to me. The income review I don't agree with as things are already difficult enough for people. Please consider capital and assets and but not income to make it easier for people.

I've been pushed to put my son into care. Some placements are £1,000 a night. We are saving you so much money, but you are pushing carers for more and more. We are already paying so much from his very small income.

There is an unfairness in the current system which will get greater under these proposals. My daughter can't work so she will be treated more harshly than a more able disabled person who is able to work as they will be allowed to keep their earned income. More severely disabled people will be penalised as all their benefits are counted as income.

People won't be able to afford this. They will just say I can't afford to pay so I won't have any social care support.

52% of disabled people already live in poverty. 1 in 3 households will really struggle. Disability rights UK say people with disabilities are already being penalised and this will only get worse.

I work with people with dementia, it is already difficult to get people to ask for and accept support due to the cost of care. This will only get worse; people will have no support and will go into crisis.

We have heard you are reviewing respite next. You really are making life very difficult for carers and making them struggle unnecessarily.

With the extra money you will raise with these proposals you should provide extra services, especially for those with disabilities. There is so little for them to do.

My husband is my main carer, we have been waiting since February for a review. I keep asking. If it already takes so long to do assessments and reviews, I don't see how you will be able to get through all these reviews.

Carers see so much stripped away with the withdrawal of services and increasing costs, it's very unfair.

If these proposals are adopted there will be less money in the bank for people to have to spend on essentials – why would anyone vote for 100% - it's like a turkey voting for Christmas

Our feedback doesn't have to be actioned by the elected councillors – it just has to be listened to – this is a done deal

I appreciate that more and more people need care these days – years ago people looked after their own family – but now we do not always have family nearby that can provide care – so we do need community care that is

provided. I appreciate that this is not straightforward given the amount that providing care costs the County Council and that something does need to give

This questionnaire for people with disabilities is just so very difficult to understand – how are they supposed to have their say if it is impossible for them to comprehend the contents of the consultation

If Derbyshire County Council adopt these proposals, you are going to make our old age people pay for this and they need their care to live. Over our working lives we have paid tax and national insurance – yet we are still asked to contribute more and more when it is time for us to be looked after

The people at this meeting today are not stupid and yet you can tell we are all struggling to understand the proposals as they are so complex. The terminology used for the finance aspect is just ridiculous.

I got a letter with all the contents sent to me on behalf of my son who was starved of oxygen at birth and therefore needs care. How is he supposed to start to understand this and what it could mean for him. It's just so complex I have really struggled with this

This will have a huge impact on the carers who look after their loved ones. We already struggle to do all the things that we need to ensure that they are cared for properly and still have to juggle everything in our own lives. This extra complex consultation is something else for us to worry about

If these proposals are brought in – it will strike at the most vulnerable people in society – it is just not fair

Where are you going to get the extra people from to do all of these financial assessments – just doing this is going to cost the council lots of money – it just doesn't make sense

Why have you made it so complicated – why couldn't you just make it 10% of what the person needing care has and take that as their contribution to their care

I am more confused now than before I came – it is just so complicated to understand what this will mean and how much we will have to pay in future

The people here have come to the conclusion that the decision has already been made and this consultation is just a tick box exercise

DCC is cash strapped and so are other authorities who have already made these changes to how they charge – no matter what we say the councillors will bring this in because they have to do it to stay afloat and provide care in the future

Natalie Hoy should be here in person to hear what we have to say, and she should have attended every meeting

These changes are drastic and so extreme – there will really be felt by anyone who needs care in the community. My son can't go out on his own – he relies on his carers. The extra burden and worry that this will put on the people who care for the people who receive care in the community will be massive. As older carers we already struggle sorting out our own financial affairs let alone having to go through this minefield to try and help our loved ones

What is wrong with charging 30, 40 or 50 percent instead of these huge amounts

Following a care needs assessment, they may only get 2 calls a day – why are people being asked to use their savings to sort their care out – this is just not fair

(In relation to concern over staffing to perform all of the new assessments) Social services are already too stretched as it is. We had to fight for a new social worker after ours left.

My son has never been able to accrue assets. The online calculator doesn't work for him. He has never had assets or an income other than DLA.

If my son's contributions go up anymore, he'll have no money to live off.

DLA and PIP were not historically considered as income.

It sounds like going forward any bills should be going in a book so that in future expenses can be claimed back. Keep receipts to be offered as evidence of disability related expenses.

If it's not broke why fix it?

My 85-year-old wife is bedridden. We can't get any help. I've had heart attacks and a stroke. She gets PIP but we still have to buy bed sheets etc. It's tiresome.

My social worker knew nothing about these proposals or consultation.

We are all feeling the loss of comfort because of inflation.

If we all say we disagree, the council can go ahead and override it by looking at their bank accounts.

Everyone's story is different but personally we want to make sure when the time comes, she will get assessed again.

It is like when we had meetings about closing day centres. They did not listen. You gave us this spiel then.

If inflation has gone up surely the government should increase payments to Derbyshire.

The government don't keep pace with our costs.

We are talking about the most vulnerable. We are trying to protect them.

We worry. It's frustrating.

One proposal is to protect different percentages of income. Nobody is going to choose the higher amount (to be chargeable)

The majority will be paying more and totally worse off.

The bills at home are still increasing.

The proposals are draconian.

They are talking about depriving the most vulnerable in society.

What you see as disposable income is what gives people a quality of life. Everyone is entitled to a quality of life. It is going to impact the most vulnerable and the council needs to acknowledge that.

The council may end up having to pay more to compensate for what they have lost.

It's the suddenness of these changes. It hits hard and it is difficult. Can the council consider a phased approach to introducing increased charges?

You say it won't happen overnight but one day they will wake up in the morning and face new charges.

If somebody reduces their care due to cost, it is going to affect their quality of life.

My son's rent is constantly increasing.

Questionnaire too complicated, offered to assist but not interested. Worries about his privacy when filling it in and personal details, explained the questionnaire didn't ask for any personal details, said think would leave it but may call back for assistance at later date.

Questions too complex

No option to suggest payment percentage.

Additional stress caused to carers

"Won't be filling in the questionnaire as it doesn't give enough options and it's too difficult to understand"

concerned that areas discussed in letter and questionnaire not clearly defined. Example being Disposable income. Does this include funds to attend activities. Also feels that this is an attempt to "drive" people out of their homes and into DCC care homes.

thinks the changes are terrible, her mum doesn't have much but will now have even less. Her mum has managed to save a bit through her life by being careful but now will have to spend it on care, it's not fair the people not got anything carry on same or the people with lots will hardly be affected.

stated that she knows the council have already made its decision and just needs members of the public to tick boxes and agree. Has stated that if we put up the co-funding her dad pays, they will cancel his care. She is appalled that people have paid into the system all their lives and now the council are trying to squeeze every last drop out of them. Annoyed that people who have never paid into the system will get away with paying nothing.

Letter not always sent to the best person to be of assistance to client

"Would like to thank Derbyshire County council for all they have done for her and her recently deceased husband.

Why should an individual have to the full amount when there is a legitimate reason why they are unable to attend an activity

"Has been sent the form 3 times and sent it back twice. Annoyed at the amount she has been sent and won't be filling it in a 3rd time. Apology given

"Not happy as has only just started to receive DP again as had to cancel as couldn't afford the Co funding charge. Commented that if it's increased, he will need to end his care as he struggles to meet the charge now and has already made cutbacks.

Form too complicated to understand.

"Stroke 7yrs ago. Stated that he has been trying to understand the form for over 3 hours, was shaking and panicing. Thanked me for explaining and said a cloud had been lifted once we finished the online version. Thanked me for being calm and understanding of his speech and confusion.

Stated she is disgusted that this would be sent out and that a simpler shorter questionnaire would have been more suitable. Said that whoever out this together clearly hasn't sat down with an actual person and gone through it with them. Said she is too busy to fill such a ridiculous form in and said that people will not reply as its too complicated and the council will take that as people not being bothered and do what they want regardless. Stated that her social worker knew nothing on the consultation.

Got given letter from friend asking what it meant. He is not surprised, He thinks most difficult questionnaire to fill in he has ever seen, how anyone even with a slight learning difficulty is supposed to understand is beyond him.

You need to get your information straight before you send letters out to people saying they receive community care when they do now. I used to receive community care but that was a while ago.

Rang to inform had never received co-funding or community care other than reablement after leaving hospital. Said service he received was ok. Wanted to know why he had got the letter, seemed very complicated and didn't really understand it.

Letter caused some concern in case she was being billed for care she is not receiving. Also felt questionnaire quite difficult to understand.

Glad of the opportunity to voice his concerns. Has previously felt well supported by his social worker who helped him when carers fell short in their service

Confused why received the letter twice, was it because he didn't fill it last one, his wife's social workers told him he didn't need to if didn't want to. Explained that wasn't the case and apologised for him getting it twice, explained up to him if he wanted to fill in but was a good opportunity to put his and his wife's thoughts across, was very thank full around receiving a call back so quickly and for putting his mind at rest

"Angered at receiving the form for the second time. Only cremated her mother yesterday and stated that she has already insisted she no longer receive correspondence from adult care with regards to this consultation.

Older carers should be given a lot more consideration when they care for family members and don't get additional support or financial help.

Questionnaire very "official" looking and has caused some concern. Once explained that simply a questionnaire all fine.

It is difficult to make a decision on future funding/services when DCC are consistently "back tracking" on current promises. Example being adaptations to kitchen that at first promised then refused.

Very unhappy with the proposed changes. Unhappy with the form not giving the amount for the National Minimum income guarantee. Says it won't leave her or her mum enough to live on. Says her mum will never afford to be able to leave the house. Says unfair sending these letters out that are very complicated to people who may not understand them, she has received the

letter, but she knows other people who have not. Not happy it doesn't breakdown the finance details more but unwilling to use the financial calculator as feels is a GDPR issue.

Thinks the proposals will leave people with very little money and force them into poverty, also found questionnaire a bit confusing but grateful for help to complete it

Had 2 previous brain operations and the questionnaire has caused her anxiety and very tearful. States it's very confusing and too complicated to understand.

Very grateful for the care she received from DCC in the past, is hopeful other people will be able to receive it in the future. These letters are scary and hard to understand and hopes this won't put people off asking for care when they need it. Understand the council has costs and needs to make saving but taking off people who have so little is very harsh. Not had a penny off the council all my life, and if I was to need it now would have to pay a lot towards.

Annoyed at previously requesting all correspondence to go to her own property and not that of her mother's as it confuses and causes anxiety to her mum.

This is more means testing

Covering letter may have caused less anxiety if worded "you may be receiving adult social care"

Sister of client currently self-funding. Recently found out she has leukaemia and worried for brother as he requires palliative care and if he has to continue to self-fund will he be able to receive all the care he needs.

Trying to use the Better Off calculator however not prepared to tick the conditions box that states DCC may take action against you as not 100% all the information accurate and therefore the system will not allow her access to the 100,90 and 80% outcomes.

"Would have been less complex to simply ask if clients agree to a reduction in capital and to suggest a percentage of disposable income they wish to be considered towards care.

Father-in-law self-funds, has dementia in care home. Annoyed that he has been sent the form as he cannot fill the form in as he would not understand. Son also receives care support and has an LD, Tracy stated that she doesn't understand the questionnaire herself so how is her son supposed to.

Wife passed away in March. Disgusted and upset that people still get correspondence after passing away and DCC being informed. (Looking at page summary we have not been notified)

Worrying to receive the letter, didn't really understand it. Think taking more money off people is terrible but doesn't think will affect him at the moment. Won't fill in the questionnaire as very busy at the moment if he doesn't have too. Declined help to do it.

Was concerned as felt covering letter was to do with his finances and confused as he does not receive care.

Although support is available as X has issues with her sight, she would have preferred either much larger lettering or a version in braille.

"When people are in need from different countries, we dig deep but when it comes to looking after your own disabled and sick you try to get as much out of them as you can and squeeze every last drop from them.

Concerned that by using the better off calculator it will trigger a reassessment of care package.

Think 8 / 90 /100 are very high amounts and should have had options for lower

has had some issues with the better off calculator and tell. adultcare email. Will be attending online meeting 02/08/23 so may raise issues there.

Will participants be informed individually of the outcome of the consultation? If not, will participants be informed that it is available to view?

Concerned that the questionnaire and covering letter too complex and appeared more like an assessment form.

Worried that care providers do not have enough information regarding questionnaire causing additional concerns

If possible, in future could there also be an easy read version of questionnaire

Are there any additional face to face meetings planned

Seems like a really big change which will affect his mum a lot. Infect some of the figures are more than she spends so wouldn't help her at all.

Glad to see additional date

Documents quite complex and difficult to understand. Glad of telephone support

The person receiving the support/Co-funding is not always legally listed as the individual to write too. Correspondence sent incorrectly, as in this case, can cause distress.

The letter update appears more like a reminder to complete the questionnaire than simply the offer of a set of additional meetings.

Would have preferred the option of suggesting a percentage amount of disposable income to be considered.

On NO account should the authority increase the co-funding costs for vulnerable adults who lack capacity by more than the actual % increase in benefits as applied by the Benefits Agency each year.

Any increase by yourselves over and above a Benefits Agency increase means that these recipients of a Derbyshire ASC Personal Budget would be required to find the difference from within their monthly state benefits and so would end up with less 'spending power' as a result. This would be unfair and discriminatory, especially as many vulnerable people to whom this applies will not be able to express their wishes clearly. I daresay that IF X, X and X could understand money, and I told them that they would have to pay more to attend their day services they would be annoyed about this. Who wouldn't?

Happy with everything, thinks it all sounds fair and is very happy with the care she receives

Understand the proposals are a necessary evil, worried it may affect him and leave him short of money thought. Unable to attend a meeting, thinks he has already given his feedback to a carer but unsure if sent off

Not happy no meeting held at Matlock, hard for people to get to the other meetings.

Felt that face to face meeting was too busy and wasn't able to discuss his queries privately.

Would prefer they leave things as they are, doesn't like the proposed changes

Stated that she has written questionnaires and reports all her life and she has never come across such a poorly written and complicated questions in all her life. She said how anyone can understand the questions is beyond her and the letter explaining it all made it all the more confusing.

Would like to say option 3 is the best of the 3 but would like it to stay as is at the moment

Questionnaire quite difficult to understand and looks too much like an assessment

Thinks it's disgraceful that the council are proposing these changes now when people have paid into the system for their whole life. There is a lot the council doesn't think about, like people who have had equity realise so have cash in their account which isn't really there's

Extra meeting a good idea and a useful reminder to people who may not have bothered with the original questionnaire to ask questions and get involved.

Thinks the letter and attached table are complicated. Also points out that it doesn't mention in main letter around the change in scrapping the maximum cap and also the possibility it could change people from single status to couple status in the national income guarantee. Thinks the changes are bad, will cost some people a lot of money and put them into poverty.

Follow up letter with extra dates looks like a letter telling people they must complete the questionnaire.

Thinks it's terrible, worked her whole life in public service and the amount they are lowering the threshold to is lower than her and husbands lump payment. Also, her disabled sons house is in her name which will be used against her when calculating her assets.

Very grateful for call back. Had been concerned as health issues have prevented her completing the questionnaire.

Very grateful for the support and information from the co-funding team. However, wishes son's social worker and care co-ordinator had more information as they have said that they are unaware of any consultation

Negative around consultations in general whilst also being critical that this consultation will leave his family worse off

Just please put a note that I'm disgusted with DCC. They used the pandemic to close virtually all-day services and now they want to chase after the most vulnerable. How about some reduction in the obscene wages the top bods are paid!! Thought not!!

I agree a review is required and that many people my mum included, may well have to pay a larger proportion towards her home care package. She has capital well below £23k, and you intend to take as much as 100% of her disposable income. It is therefore essential that she has sufficient income to continue to live in her home, maintain her standard of living as a 90-year-old and to have the finances to maintain her house when needed.

The jump from £50,000 in capital assets down to £23,250 seems a very big and sudden jump and is currently causing my parents some concern.

They're both reporting that the documentation is complex and difficult to understand; they're asking if an easy read version can be produced? Is there one

Already? They'd like to contribute to the consultation but feel without this, they're going to struggle.

It would have been good to give background as to the changes, and I appreciate the balancing act DCC have to do funding wise, but this is going to

damage people financially at a time when there are innumerable pressures on individuals already. DCC already take away the majority of our daily living allowance which is meant to aid us with the cost of day to day disability, I understand co-funding but not taking away money meant for the extra costs incurred by disabled people provided for that sole purpose, DCC have always counted this as 'Means' in their calculations of income when it is ignored for any other benefit or service i.e. Housing benefit. This will I am sure drive many of us into poverty, because of the way DCC do the calculations they have always taken Daily living component into account in the initial calculation and then it is part of what is then in the excess income taken as co-funding: a double whammy... of course I accept that Funding isn't a bottomless pit but this seems ill targeted.

My answer to Q5 is the following, please can you capture this part of the questionnaire outcome:

If you take away 100/90/80% of disposal income how is my son able to access the community as he would have no money left. My son has learning and physical disabilities therefore unable to work. He has no income apart from PIP & UC. If you take away 100/90/80% of his disposal income the impact will be:

- * Social exclusion - to access community, going bowling, meeting his friends, attending day centres etc.
- * Mental health - depression, anxiety, challenging behaviour increased, effecting his confidence.
- * Limited accessibility to medical equipment & facilities.
- * Financial instability.

It also reduces presence of disabled people within communities as they cannot afford to go out. We should be encouraging all diversity to access the community. It isn't my son fault he is disabled, how is it fair taking his PIP / UC (100/90/80% of his disposal income) away from him? If he could work, he would, but unfortunately his circumstances are different. I am very concerned disabled people will be living in poverty, effecting their mental health, social exclusion and not encouraging diversity within our communities. £20 per week as an additional / top up for a disabled person is not enough to support their care needs.

Hi re your recent letter of 15/8 concerning the above. I did take part in the online meeting of the 21/8 with the help of my niece.

Reply following second letter re cost concerns

Reply by councillor Natalie Hoy to David and Hilda regarding questions around if the changes are needed and if they are the best way to go

E-mail from H+W officer regarding comments from resident: • As a housebound lady of 87 with limited online skills both the consultation group and online group sessions were inaccessible

- The options offered were very limited
- The paperwork that came with the options was dense and there was a lot of it, it was confusing, and it was very hard to understand it all.

There was never going to be enough money to cover all the demands of care in the community, it was a misguided pie in the sky option in the first place

Mostly negative. Points around funeral costs, the fact it is such a big jump, how respite care may have negative effects. Also, an understanding that Derbyshire is very generous currently

Whilst I understand the need for the council to seek to alleviate the very high costs of Adult Social Care, I am concerned at the very high costs to be borne by some residents who are far from well off, and the impact of the new charges on their living standards.

I am also concerned that the highly complicated calculations and difficulty in calculating Disability Related Expenditure for people receiving care will mean the council will need to spend a disproportionate amount on staff to implement the new charges, and that vulnerable residents could end up being over-charged due to inability to challenge DRE decisions.

Specific points are:

1. More needs to be done to ensure the proposals are clear and can be understood by residents and their families. Having attended several of the consultation events, both in person and online, I was appalled by the lack of clear explanation of the proposals.

No slides were presented to set out the proposals, no worked examples were given. Even people of high intelligence and financial capabilities – including accountants and other finance professionals – remarked they could not understand the proposals from the explanations given. One attendee in Buxton remarked she was more confused after the consultation meeting than she had been at the start.

When people cannot understand the proposals, it is impossible for them to provide an informed response. For example, one resident in Buxton said he had simply ticked all of the middle boxes as he didn't understand the

proposals and their implications, and he felt his wife – who had dementia – would not understand either.

2. Impact on particular residents: the Cabinet paper makes clear that some residents will be hugely impacted by all 3 proposals. Appendix 4 shows that:

- Example J – a pensioner aged 76 with no capital above £14,250 would go from paying nothing to paying either £498.10, £448.29 or £398.48 per week for care – up to 75% of their total disposable income for their care.
- Example L – an 89-year-old disabled pensioner on Attendance Allowance with no capital over £14,250 would go from paying £51.07 to paying £252.94, £227.65 or £202 per week – 54% of their total disposable income.

These are far too great amounts to be levied on older people with almost no notice.

The lower amount of 80% should be levied and there should be a transitional amount of a maximum of 50% of disposable income for those currently receiving care.

Transitional protections are an established and legal means of introducing changes to benefits – e.g., in the switch from tax credits to Universal Credit, or the Severe Disability Premium.

3. I have received no answer to my question to Full Council on how the Council propose to protect couples' income from falling below the couples' MIG when the partner not receiving care has income of less than half the MIG.

The council will need to establish whether this may be the case, and if so then partners' income needs to be assessed. If their income is below half of the MIG, then the partner receiving care should be charged a reduced amount to ensure the couple's combined remaining disposable income is above the couple's MIG plus DRE.

This can be a common situation, especially where the male partner is receiving care and the female partner has a reduced state pension entitlement – as so many older women do – and no occupational pension or other income.

4. Pensioners who receive Attendance Allowance should receive the Disability Premium in their MIG. Failure to do so would discriminate against people of pensionable age and fail to take into account their additional costs and constraints of both age and disability.

5. Where people pay themselves for part of the necessary care set out in the Care Plan – for example where the council have been unable to commission sufficient carers to meet their assessed needs – the amount that the residents pay themselves should be deducted from their care charges or treated as Disability Related Expenditure.

6. Assessment of DRE: the Council has never properly assessed DRE. This will be a huge task for all those who are eligible for a higher amount than £20 per week.

First, it will be vital that residents understand how DRE should be calculated and that they have the right to request a full assessment of DRE if it is likely to be higher than £20 a week.

Then the council need to ensure sufficient staff resources to not only complete all of the financial calculations, but also all of the DRE assessments. This will require a significant number of properly trained staff to understand both the care requirements and their financial cost.

No resident should be charged for care until their DRE has been calculated as residents could end up without sufficient income to get by, or to afford the DRE that they need if they are charged up-front and then DRE is assessed later.

"My daughter is in receipt of your letter dated 10 July 2023, requesting her consultation on your proposals for Community Care Charging.

X receives support from adult social care for her needs, as she has learning difficulties* (including comprehension difficulties), is on the Autistic Spectrum, and has coordination difficulties and anxiety. She is vulnerable in many ways, is not able to access the internet or use the telephone to make new calls or leave messages.

The letter and associated paperwork were sent to x directly. She opened the letter in front of me and had no idea what it meant. After reading through your letter, I have to say that it absolutely does not explain in plain English what the consultation is about. There was no 'easy read' explanation to support the letter. My daughter has no comprehension on what you are asking. It is also very difficult to explain this to her when its full of lengthy jargon and financial wording.

Within your letter you state - ""We are proposing three options to be considered which are designed to make our policy fairer and equitable when considering people who receive adult social care support"". In order to be

fairer and equitable you need to consider who you are sending the consultation to.... The three options are impossible to comprehend unless you understand financial jargon. Even within the questionnaire it's difficult to understand / explain to x, the terminology for the pricing policy. The consultation is too lengthy (5 separate wordy papers included with the letter) and does not explain things in a way that someone with needs and who accesses DCC adult social care services, in a way that they can understand or respond. The questionnaire is too wordy for someone with learning difficulties and autism to understand, in fact it raised anxiety in attempting to read and explain it to her.

I find it appalling that you ask those most in need of support, about the charging tariff proposals for the services they receive, in this way. If I had not been able to read this through, my daughter would almost certainly have ignored the letter and its contents as it is impossible for her to comprehend it. She would also certainly not have read to page 4 of the letter and requested an easy read copy. As it is, x is not able to respond to your consultation, she is therefore excluded.

If you would like a response to this consultation in a 'fair' way, please re-write and re-send in a format suitable for those who have complex needs and who are in need of support"

What is the point in completing questionnaire when decision have already been made

Concerned about the proposals and how the consultation has been done.

This is about my disabled son X. I look after my disabled son's finances although he lives in supported living with 2 other disabled young men supported by United Response. I am X and live at X. As you are no doubt aware the County Council Community Care Charging Consultation is out at the moment, and this requires a financial reassessment of disabled people. I have done the reassessment for x and the likely charges are horrendous, x currently contributes £51.07 per week which increases each year. Under the proposals Joseph's contributions will increase to a minimum of £81.44 per week or possibly £91.62 or £101.80 per week. These proposed increases mean a minimum of a 60% increase or possibly up to 100% increase in charges. I am extremely concerned that this will leave x without enough money to live on and feel he is being discriminated against, being disabled, as he is an easy target. I understand that community care is a very expensive part of the County Council's expenditure, but it is impossible to justify such huge increases. Again, this conservative Government / Authority says it will protect the disabled but does exactly the opposite. I could understand a slightly higher than inflation increase but these proposals are monstrous and

should be opposed vehemently. Could you please confirm your opposition to these proposals and make my feelings known amongst your fellow Councillors.

To be honest I don't understand any of it

The most vulnerable in society are once again being selected as easy financial targets

Keep weekly cap

We are struggling to pay bills now (utilities) and do not get wage rises e.g. (up to 27% some are asking. Its more burden on pensioners who are unpaid carers.

To remove the maximum capped charge completely (or set it at the actual cost of care) will cause a very significant increase in charges for some.

Disability payments should not be included they are to pay for expenses such as a mobility aid or special taxi

I think only a small amount of disposable income should be considered 20-30% at most

I don't think attendance allowance + pension should be included as disposable income when they are my right after working for 55 yrs. Private pensions/work pensions yes.

"Disposable income"? How can a stranger identify what is disposable income. We often have to save our disabled sons excess money to purchase therapies, equipment or one holiday a year (+2 carers to go with him).

If you have money its ok but I haven't got enough to save. I haven't got much money as we lost it years ago. That is why I have to have help.

Disabled people have a right to savings, this isn't " disposable income", this is exactly the same as non-disabled people have- money to save up for a better quality of life- to buy a home, a dog, to buy clothes that meet their needs e.g., sensory. Disabled people face significantly more financial expenditure than non-disabled, why are you only accounting for only £20 when the average additional expenditure is 63% (!!) Of a disabled persons income. (Scope UK).

Feel it should stay the same

This is absolutely barbaric, pensioners are struggling already to make ends meet, this will drive a lot to cancel care due to not being able to afford. You are essentially going to kill people.

How can a council know what people's disposable income is on guess work?

Not above 80% because of increases in the cost of living.

Should be a min or max amount on when peoples should start paying for care

I would like to know what you regard as disposable income. Do you class benefits such as attendance allowance and disability living allowance etc as disposable income? I feel we need this clarifying more clearly.

Disposable income in these times of £400 monthly fuel bills food bills stratospheric? Are you people not satisfied with your extra slice of council tax?

People with more disposable income should pay more

I think social care charges should not be based on income as in line with disability benefits which are not means tested.

You have a duty of care to provide social care do not tax the sick and disabled!

It should be done on an individual basis how much each person has. All benefits should be disposable income related.

The wording and presentation of this questionnaire which will ultimately be a large cost of money and only lays out questions most over 70s people will be unable to answer.

Relate chargers only to dale/pip? All of which are no means tested. People who are saving towards retirement should not be penalised for their disability.

It is not disposable income it is our father's case, his pensions which he has earned and paid into his whole life. He has also paid his national insurance and tax his whole life. This vast amount of tax money he has paid into the government coffers for 50+ years should allow his care to be paid for by the state in its entirety.

Individuals on benefits, should not be charged anything and the minimum income guarantee should be abolished.

I honestly do not completely understand this.

O A P's are not getting the support from government that it should

I really don't understand any of this. But I would like to say that just as child benefit is given to everyone, so should disability benefits + personal care. Those who are careful with their money should not be discriminated against.

An old person would not be able to understand the proposals. Unable to get on your website to find out more information. The proposals are too complex to follow for 99% of the population!

I did not understand your questions I am deaf and housebound therefore I request a home visit x. If you change my funding without visiting me, I will regard as discriminatory

There are not enough options. Our daughter will be very much worse off financially.

The cap should not be removed savings would not last more than a few months.

Individuals with current climate of living crisis cannot afford to pay out of their disposable income.

The charge should be the same for everyone regardless of disposable income.

The £20 disregard for disability related expenses will disadvantage many who's disability expenses significantly

Stay the same

My daughter is unable to work because of her multiple disabilities so any money owed to derby county council has to be paid for out of benefits.

I have no income i.e., retired at age 65

I find it unbelievable that after working all your life and paying tax. Going without things to save for a rainy day - you then get penalised and have to pay for your care. Whereas people who don't work will get it all free.

My sister-in-law does not have much income left after all the bills are paid my sister-in-law does not use any of the services apparently co funding should provide don't think she should pay for this.

People are left with nothing on disability already. If you ask £10 month from people that may help?

I understand that costs increase and agree that maybe we need to increase our current £50.07 paw but to use such a high percentage of what you would call disposable income is not justifiable, life is hard. Enough for a lot of disabled people. A huge increase in contributions will mean the difference between living and existing.

I think the system is fair at the moment.

Pip is non-means tested. Payment should be dependent on rate of pip or dale. Disabled people face extra costs to daily living already.

Change should never be more than care component part of pip or DVLA allowance

Disabled people are already on the poverty line and shouldn't be penalised for their health/disabilities financially.

What happens if you have none.

Totally unfair to charge for care for some and not others, especially if already receiving care.

Don't agree with qu4 but 80% is the lesser of the 3 evils! It should be based on a much lower %

It should be separate

With energy + food bills being so high and inflation showing no signs of reducing significantly in the near future I suggest the changes need to be phased in to allow time for the cost of living to come down.

What happens if you have none left.

This survey appears to be an excuse to penalise the already disadvantaged disabled community. To strip them financially on top of their disability.

The disposable income takes no account of necessary expenditure such as rent/mortgages, gas, electricity, water. It can't be a blanket amount.

Retain existing scheme.

Continue with present policy.

Leave it alone in this day and age all money is needed to live.

My niece lives in a shared where her bill is horrendous if it was based on her income with those percentages, she would not have much left for clothing + new bed 1 chair furniture.

Have a scooter to get about, can't walk far

The majority of people getting social care support are in a situation they never thought they would be in as most have played into the system. All their lives they should be able to get a bit back not much disposable income left this day.

I don't believe that social care should be means tested and people who have made additional provision for their retirement at their own cost should be penalised and that those who haven't should be better funded - it removes the uncertain for people to make good provision for their retirement!

I strongly agree if a person has more than £23,250 up and above to £50,000 then they should not get the financial help that a person gets he/she has less than £23,500

65%-70% of disposable income as a maximum seems more reasonable. What happens if your disposable income isn't much to begin with?

Clearly 80% is the most-acceptable option as food, fuel and all costs are rising (inflation currently at 17%). It is a worry as we can't know how prices will continue to increase. Furthermore, we cannot know how landlords will increase their service charge in supported living situations.

If these proposals come in people, might as well go into a care home where you can keep £23,500 income get 24 hr care, food etc and my cost would have to be paid by the council approx. £800 per week, talking about trying to keep people in their homes, it's a joke! You need to build more care homes as majority that don't own their home would do this and cost the council more money.

Disposable income is already under strain because of the cost of living a utility cost. I need my heating on at all times and have 4 carers as I have mobility problems.

Why should I pay

After paying tax most of my life I think that charging people for the care is despicable.

Individuals that have worked all their lives and been cautious with their money should not be penalised for having savings. Everyone should be given the same.

Disposable income should be banned, those with excessive amounts of disposable income should contribute more, i.e., more than £50,000 care is expensive and when you don't qualify for the you need i.e., under the council guidance you have to pay for more anyway as I am currently doing.

I don't have saving £1,000 but it for emergency if I have any. I get industrial injury £40 a week pip a month 249 ESA 250 a fortnight. I have a mutability car 72 a week for hiring of it

Not at all, stop using vulnerable people to save money

Disability related expenditure may be hard to measure and prove. E.g., helpers/gardeners may be paid cash in hand. It would make more sense to increase the maximum capped charge. Why is this not listed as an option?

With the cost of living going through the roof, how are disability people going to afford the extra costs you are proposing, we are struggling to feed a heat as it is.

There are not enough options. I would be a lot worse off financially.

Income calculations need to take more account of individual circumstances and properly reflect the additional costs incurred by people with disabilities.

No one is going to opt to pay 100% of their disposable income - what an absurd question. Why isn't these an option for none of the above??? A fourth option should be to change nothing.

Obviously, people will opt for option 3. Who's going to ask to pay more??? Why isn't these an option 4 - leave things as they are. Elderly and disabled people are always discriminated against

I think it would be very hard for retired people if one partners income was reduced so much

As we have worked all our lives into our 70's, I object it's this money grabbing, as the cost of living, food etc? Increasing my husband is 88 yrs. has myeloma, diabetes and stroke etc

Would not like to see higher than 80%

These questions are not easy to understand.

Disposable income should be looked at in regard to where that income comes from. If your income is from state benefits only, then this should be completely disregarded.

I'm really struggling with this form I don't understand half of what's being asked, and we certainly don't have that kind of money

Do not change the current formulas and agreements

I feel that those who are most vulnerable are being targeted. People are okay to refuse care or have to decide on care/? / ? Making health deteriorate requiring more care

Why adopt on the national minimum income guaranteed rates, when you have a perfect system already. Keep what you have and drop the new proposals.

People who have worked all their lives or who have savings because they choose not to drink, or smoke should not be treated indifferently to those who squander money.

Should only have to contribute D L A/pip a/a care which is supposed to be for care but those with fewer hours should pay less

Same charge for everyone. None should get it free.

I think the move to any of these arrangements in one move will likely cause distress and hardship. Your current scheme is particularly generous a service

users will notice a huge change in the amount they are charged. Could you consider a more staged or staggered approach?

How about 50% of disposable income.

We are happy with the contributions system as it is at the moment. It has worked for us for many years.

I cannot afford to live now!

The more disposable income a person has the greater % should be charged. For e.g., charging 80% of £100 leaves the person with £20, but charging 80% of £500 leaves the person with £100. It would be fairer to charge say 20% to the person with £100 disposable income leaving them with £80 and 80% to the person with £500 leaving £100.

All 3 the % options detrimental to people on a lower income. You should consider charging a higher amount or 100% to those with a greater amount of disposable income. This would protect those on a lower income and be a fairer approach.

Have no capital

I believe that with the present cost of living that £14,250 is dangerously low to start relieving people of their capital.

£14,250 is too low to be taking an individual's capital.

Seems you want to make people struggle more to save yourselves money

The reduction in the capital allowance from £50k down to £23,250 is too bigger step. This adjustment should be done over say 2-3 years.

Disgusting. What have you done with the council tax charge we all pay called 'adult social care precept'? Leave people with £50000.00 in assets/savings which is not that much money these days. People can stay in their homes for longer, but they need maintaining/ modernising/ new boilers, 23,250,00 is not enough.

Life assurance bonds should be excluded.

Pensionable age customers generally have capital tariff as £1 for every £500 when assessing benefits which you would at the least to be applicable when assessing care costs.

Cost of living increases over time- it does not diminish. The £50k limit should stand. To reduce it takes even more of the assets any disabled person has acquired.

If you have been co funded previously - its better a high % to have extra 80,90 a 100% of disposable income-charged on - how about only 50% of disposable income.

It should be treated bearing in mind the people that need care are ill or too old to look after themselves and need extra money to be able to pay people who help them as well as carers.

Percentages are too high (way too high) cost of living expenses have increased so much that disposable income has reduced significantly. It may get a point that I cannot afford a lot to keep my disabled son living with me and have to consider full time care- at additional cost to adult services!

Disposable income is difficult to define when living with illness. These are many expenses that do not qualify as disability related expenses such as recommend supplements extra water and cleaning charges from more frequent washing etc.

Disability incurs many additional expenses pip (attendance allowances) daily living is not just for personal care it covers other aspects inc extra food? Heating cost/ etc

During a cost-of-living crisis, the vulnerable and disabled have little lesser for reduction in so called disposable income.

Disposable income assessment should take into consideration all potential expenditure that helps improve quality of life as well as things like clothing etc.

Do not understand the above.

People living in their own homes have seen a dramatic increase in expenditure in terms of increases in council tax, fuel bills, water rates, food etc etc etc

If there are changes made, those whose payments increase significantly should have the increase phased in over a period of time.

People don't have the money for you to be taking it off them.

I think the percentages are all too high. We both worked hard & saved for our retirement. However, most of our savings have been spent on care. (approx. 500,000)

As always people who save through their lives to leave a small nest egg for their family are penalised leave at £50,000 and say 50% charge above this.

Suggest 50%

Regarding q4 - 80% is the best of a bad bunch but we are not really happy. Why was there no proposal for charges to remain the same, with inflation increases?

You shouldn't be looking to take money off the most vulnerable people in society at all. No system you are looking at is fair to disabled and vulnerable people. You should run your whole operation more efficiently and with the public in mind all you want is to take, take, take. You should be ashamed of this and any proposal like it.

I believe that a lower proportion of disposable income should be used - say 50%. Could the changes be phased in, starting with a lower % of disposable income + increasing each year until the desired % is reached. More items of expenditure should be included before disposable income is calculated, e.g., an allowance for repairs/maintenance on an owner-occupied house to bring them into line with rented properties.

Where the mental health of someone isn't fully taken into consideration (because of the changes). I believe is unacceptable.

There is no such thing as disposable income - as every penny is valuable and needed tax and nil are paid all working life, which should be enough.

This is basically a money grab on the lines of khans ulez to hit people who have done the "right thing" throughout life, accrues? Wealth paid taxes, in et and then afflicted by serious illness in? Light years are penalised.

To a larger increase in one go is too much with everything going up will be a struggle.

Not known

Under the headline 'additional costs' on the D R E fact sheet, mention is made of 'normal household expenditure' but these costs will differ widely from household to household. Some will be single person household, some family group with more than one wage earner. As a result, each case would have to be considered separately to arrive at a figure for 'normal household expenditure'.

The adult service has been screwed enough. Leave them alone go somewhere else for money.

When you work out disposable you don't take into account living costs such as board / rent, why is this?

Another example of these who haven't contribution, i.e., chose not to work still get away with contributing nothing with people who paid their taxes all their all their working life picking up the bill.

In principle this seems like a fairer way to do this, but the disposable income needs to be calculated fairly + regularly re-assessed in line with inflation etc. Current on 60-70% would seem fairer.

Do not touch any body's disposable income

Some people are better off than others so can afford to pay more. I worked 38 years and paid a full insurance stamp I was in nursing

If the disabled person has savings and income, it should not be used for care unless this has a lead in period of 10 years.

This should be an individual benefit regardless of saving etc.

If the council cannot afford the prevent arrangements, they should bring in changes gradually over a period of years.

I feel that it is unfair to currently have a cap on the amount that people are charged and potentially some people could be a lot worse off under the new proposal I think there should still be a cap on the amount, even if it is slightly higher.

A fair and equitable limit would be no more than 50% of disposable income.

Why are people who have worked and saved being punished

There should be more bands

Non means. Tested benefits should not be included in calculations. Taking 100% or even 80% of someone's disposable income will lead to people being miserable, which will cost the country more in health-related expenditure due to poor living conditions. Disabled people deserve happy lives too.

With the cost-of-living crisis ongoing, I think it's despicable to consider taking 80-100% of people's disposable income. They can't work due to rare + support needs, so will be forced to either live in poverty or go without care. Non means tested benefits (pip etc) should not be included.

People who have worked all their lives or who have savings because they choose not to? Or smoke should not be treated indifferently to those who squander money.

Should only have to contribute dale/pip a/a care which is supposed to be for care but those with fewer hours should pay less

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Do not understand the above.

People living in their own homes have seen a dramatic increase in expenditure in terms of increases in council tax, fuel bills, water rates, food etc etc etc

If there are changes made, those whose payments increase significantly should have the increase phased in over a period of time.

People don't have the money for you to be taking it off them.

I can hardly afford what I am paying now.

My elderly mother aged 97 worked all her working life so should be able to receive all her entitlements.

An alternative would be to increase the current cap to generate more income. To calculate at a lower percentage than 80% as people will be left with little or no money.

People with low incomes should pay less!

The council needs to get to grips with people who are giving false information!! Regarding capital assets (I know this is a fact)

This does not seem to take into account other needs i.e., nappy pads and sheets, washing for person with incontinence.

With the cost-of-living increase, people with disabilities are struggling financial and cannot afford to make further contributions, carers are contributing towards their costs with transport etc

Yeah, I'm all for it, take my money

Can't pay won't pay

By using disposable income, you are depriving people of the ability to pay for their basic everyday needs such as utility bills, travel costs, shortfalls in rent. What about when people have deductions from benefit leaving them with less than the government applicable amounts for basic benefits. Your plan gives no incentive to for people to claim disability benefits or pension credit. You are causing people to choose between care or having medication, heating, or food. Its abhorrent

Under the equal opportunities act the council must be treat local residents equally and provide the same set of opportunities regardless of their age, sex, race, disability, sexual orientation, disability, culture or anything another

personal characteristic that might be discriminated against. Those who are entitled to adult social care support are often on the lowest incomes and near the poverty line. It is unfair to view their "disposable income" as a means to fund the deficit in social care.

The contributions should stay the same as they are now. The other options are too much. The people affected have worked and lived a long life and should not have so much worry about their finances like this. They have paid into the system for decades as it is.

The current method of calculation should not be changed.

Should not move to a disposable income test. Maximum anyone should pay should be the benefit amount less £20

Taking more disposable income from people will lead to more people falling into poverty which's means more use of food banks, discretionary fund etc. It will also result in some vulnerable people refusing care as they will feel they can't afford it or are causing their partner/family financial hardship. Social care should be free at the point of need as the NHS is and this should be done by increased taxation at a national level.

When someone has contributed to society all their working life, and have lived a simple life to create savings I feel it is unfair and cruel to take their money away to pay for care when lazy people who have never done a day's work, never contributed to society, and have frittered their money get everything paid for. The Council also waste money on useless schemes and unnecessary training, furniture and pay-offs to senior management that could be better spent on care of its residents,

I've worked hard all my life and brought my 2 children up on my own and never claimed anything. I get my pension and that's it. I do everything for my daughter now and she gets disability benefits so why should she pay that back to the council when she was born disabled. She gets very little as it is. Can't take blood out of a stone.

It would not give my husband enough money to pay his half of the household bills and I would have to pay to support him. I think this is unfair as I am struggling to work full time and care for him, I might as well give up and put him into full time residential care. I feel that there is not support if this happens for me to care for him at home.

As with so many of these proposals they are targeting those who deserve the help whilst leaving funding for those that do not. All those responsible people who saved are punished, all those who frittered their money away are rewarded. Frankly the whole system is loaded against those who work hard in favour of those who have not

50% is a fairer price people who have worked for 50 years of their life and paid taxed shouldn't be charged more because I'll health especially as some of the health problems have been caused by their work done and work environment which they had no control over

People who are on benefits are going to struggle if they have to fund an increased funding towards their care.

Because people may have worked during their lives and have a private income as well as PIP, in some cases it is wrong to charge anything. Especially when the person was born disabled.

A lot of people will struggle especially as everything is going up

It is disgusting that you are introducing proposals that will make over 70% of the elderly receiving adult care worse off, it's bad enough with the cost-of-living rises, energy costs rising, food costs rising that you are proposing to take more money from the elderly.

I am only on ESA and pip benefits. If my contributions went up to 100%, I would end up having to stop my care package. My pip and ESA go on bills and disability costs. I cannot afford to pay more than £51 a week. The council says we can get money off the contributions cost, but I know it will be very rare for the council to reduce our contributions cost. I feel the council is all about making money and taxing disabled people.

There needs to be transitional relief for people especially affected

I can only just about afford the current capped co-funding amount. After filling in the calculator I will be paying more. My DP helps me to have assistance to attend hospital. If the co-funding charge is increase, I won't be able to afford this support and would not be able to go to appointments.

Due cognisance should be taken of the fact that people living in their own will have maintenance costs to maintain their property.

Depends on people's circumstances

According to Retirement Living Standards in order to maintain a "moderate" standard of living in retirement a single person requires an annual income of £23300 and the equivalent figure for a couple is £34000 (London rates are higher than this). I consider these amounts to be a fairer basis for determining amounts of self-funding. I also consider that the proposal to remove the maximum contribution cap entirely to be very unfair. I would prefer to see the cap raised by a reasonable amount.

What is really meant by Disposable Income as that can change from week/month/year due to personal circumstances

Basing any support on Disposable income is unfair, if for example If I've worked hard all my life and done without to make sure I have enough to retire on, whereas someone earning the same as I did could have spent all their money 'living the life of Riley'. Under the assessment you would 'give' more money to them. Any assessment should be based on what you have paid into the system. Also, I'm now 96 and looking at having to replace my bathroom (as I can no longer get in and out of the bath) ...

People get disposable income from working hard and paying into pension's so that they have a little bit extra to spend during their retirement often going without in younger years. It does not seem fair that again people who have done little or no work will end up with a similar amount of disposable income as someone who has contributed into the tax system and helped keep the country going.

The proposals are a drastic change from the current situation. The current rules allow people with modest income to live with dignity. I am angered that under the new proposals I lose most of my disposable income if I have to need care to remain independent at home.

The £20 disability disregard is too low. People with disabilities face a raft of extra expenses which might include: £200/year on wet wipes if one has a stoma/stoma bag; thousands of pounds over 5 years if one has to purchase, service/repair a stair lift; extra transport charges for increased health appointments; increased laundry costs if one is incontinent; purchase of mobility aids not provided free etc etc. It would be demeaning to ask people with disabilities to prove this extra expenditure

Those receiving benefits should not have to pay towards cost for care. Adult Social Care should be supplied by the State so that a proper check can be carried out on internal council run provision. The Care Quality Commission is an ineffective, corrupt organisation that works hand in hand with the very people it is supposed to be checking. The veracity of documentation provided by private care providers is not thoroughly checked.

If you take away 100/90/80% of disposable income how is my son able to access the community as he would have no money left. My son has learning and physical disabilities therefore unable to work. He has no income apart from PIP & UC. If you take away 100/90/80% of his disposable income the impact will be: * Social exclusion - to access community, * Mental health - depression, anxiety, challenging behaviour increased, affecting his confidence **Does not allow me to type more info in this box**

How can I agree to you charging for my daughter's care at these rates when I would not have any say in these rates? It is already unfair that she is so disabled that she cannot support herself with a job like her peers. If you want

to take all her money off her, I may as well do it myself and I might even find better options

To the credit of DCC they have had a higher threshold than the national MIG rate - important in such a large diverse urban/rural catchment area. One size does not fit all.

The current system provides the best means of charging for this service.

I completely disagree with the use of any disposable income in these assessments. This discriminates against people with disabilities who are already struggling with the cost-of-living crisis

It is deplorable that at this time of great need for people in this country and especially vulnerable people, that Derbyshire County council is advocating making the poorest people even poorer. Your proposal is genuinely chilling and shows a shocking lack of both empathy and a lack of understanding of disabled people's situations. This 'disposable' income you intend to take more of, is not disposable. It is vital money for already struggling people and in my opinion, it should be raised not lowered

Continue with the current system

I feel the care element in PIP should be used for care costs.

Current proposals do not take into account existing expenditure on utilities bills, food, transport etc.

You don't appear to make any allowance for current household expenditure. Especially with utility and food bills so high at the moment, it is going to be impossible to feed myself and heat my small bungalow if I have to pay so much extra for care

I think this could not be across the board and that every individual's circumstance is looked at separately rather than conformation

If it is not breaking, do not fix it

Unfair on poorer people who have little savings, they end up with minimal £23500. There should be a higher cap to protect the savings of people who have earned less. E.g., someone who has saved carefully with £100 000 is more likely to pay for their care and use most of it. Someone wealthier can spend on their care and it will be a drop in the ocean not affecting their savings as probably their income can cover the cost of care. Put up the threshold for savings not down!

Not even worth the paper it's written on plus your changing for changing sake and not on any of our needs

Disposable income is currently affected by high gas and electric prices. My nephews summer bill is £150 which has directly impacted on how much money he now has after other essential. Inflation has impacted massively, scooter insurance up, servicing up, food up, taxi price up. He no longer has any surplus and is already on austerity measures. Further increases will see disabled people shouldering the cost of inadequate funding and throw them further into poverty.

What differences are there for people living on their own as opposed to cohabiting?

With the cost-of-living crisis still on, going, people are struggling to pay for the energy bills due to the Energy companies corporate profits scheme steered by the present government.

PIP is paid to the person to promote their independence in the community - taking it into account in the calculation of disposable income totally negates the underlying intention to allow the person to be independent

I am already trying to cut back on what I pay. I'm just keeping my head above the water at the moment.

I think that people should have more support.

This is all very dependent on an individual's circumstances but 80% seems too much for my Mum. (£103.34 a week worse off at 80% and £84.03 at 70%) I understand totally that people need to pay more but there seems to be insufficient allowance made for 'other costs' that are essential for wellbeing when you are alone at 89 (hair, chiropody, gardener, window cleaning, taxis for hospital visits,) plus maintenance and repairs to an old bungalow. 70% would make it more manageable with less worry.

There needs to be more transparency and clarity around what is considered 'disposable income' for many people who require care services they do not have disposable income at all costs of living can be higher e.g., needing heating on more frequently or modified diets making shopping more expensive however this is not taken into account

Disposable income should be taken into account of what's needed in the home for long term illnesses for example personal hygiene pads toiletries washing clothes because they've been soiled etc

I believe a lower proportion of disposable income should be used, say 50%. Any changes should be phased in, to give users a chance to adapt to what could be a significantly lower level of money available to spend. Any changes need to be fair to all, regardless of their circumstances - if people in receipt of

DLA will be allowed to keep the mobility element, then there should be an equivalent disregard for those in receipt of Attendance Allowance.

Maximum of 50% would be a fairer rate. Given how quickly the costs of everyday items are increasing the disposable income purchase less and less every week

Not sure what is considered 'disposable' income is but either way it should be considered in the light of current national financial situations which affect essential life sustaining costs. E.g., With high energy and food prices someone's 'disposable' income is going to be substantially lower than it has been in the past.

Please keep everything as it is now.

Cost of living crisis

If charges are to be made on disposable income, then every single penny of expenditure needs to be included in the calculations. The current calculation only includes a few pre-determined expenses. E.g., I am a tetraplegic paralysed from the neck down and consequently require considerable help and support. Much of this is provided by my 80year old husband. This is having an adverse effect on his health, so we are gradually using more of our disposable income to pay for additional help in the home.

Whilst understanding that a change needs to make, I think that the proposed percentages are too high. I think 50%/60% should be the maximum. The MIG would not be enough to make up the gap between DCC payment and what the care actually costs. Currently we are receiving the maximum amount for care at home which doesn't reflect the number of hours care we actually need so all of the disposable income is used to make up the shortfall and give us a choice of quality of care.

There is a Minimum Income Guarantee which is age related. Personal circumstances should be taken into account as a person under the age of 25 who lives independently has the same living costs as someone older therefore using the Minimum Income Guarantee as a base is discriminating against them. Also, the fact that earning income from employment is disregarded, which discriminates against those who are unable to work.

There is an age-related Minimum Income Guarantee. A person under the age of 25 who lives independently has the same living costs as someone older therefore using the Minimum Income Guarantee is discriminating against them. Earned income from employment is disregarded this discriminates against those who are unable to work.

These proposals will increase Age and Disability poverty - Counsellors who vote in support must know that they are consciously condemning disadvantaged persons to increased poverty with all the additional risks that entails to the individual and the consequent cost to society.

Why should some waster who has never saved or paid tax get the same care for a reduced cost?

I do not think you should increase in any way the amount disabled people have to pay for their care. There is already a poverty gap for people with disabilities and you are seeking to widen this gap further, which is absolutely shocking.

The calculation of disposable income is based on artificial presumptions that do not accurately reflect the true financial circumstances of the individual. It penalises those who are incapable of working due to their disability, an injustice that already exists with the current system but with the proposals only serving to exacerbate the unfairness of someone who is working having a lower disposable income than someone confined to claiming benefits simply because earned income is disregarded.

Should be a 100% disregard

Adult social care should be free. However I don't see how this is a real consultation. The general public couldn't possibly understand what you're talking about here. It's not written in plain English it's written in council speak. Really that makes it invalid as you have things like disability disregard' 'capital assets' 'disposable income' without anything to explain what is meant by that! If you're going to consult you need to strip all this language down!

I believe the cap should remain but be increased

I believe the cap should be kept but look at or reviewing to make slightly higher

£20 is a very low allowance for all the additional weekly costs associated with being disabled for most people. Disabled people and their unpaid carers should not have to wade through even more bureaucracy in order to have to apply for a higher allowance for this. Things should be made easier for disabled people and their unpaid carers, not give them yet more hoops to jump through. Raising the 75% to 80, and even worse 90 and 100% is the council seeking to raise money from the most vulnerable.

Why does it have to be 80% the lowest. Who made this decision?

If they have to increase the amount it should be gradual 60%, 70%, 80% maximum over a 2-year period.

My husband provides most of my care needs. The very expensive provision funded by DCC only meets a small proportion of my actual needs, dressing, toileting twice, breakfast, lunch previously prepared by husband. He feeds me, which includes buying all the food and cooking, he toilets me 4 times a day, he cleans the house, he does all my laundry, he deals with all correspondence, banking, finances, organises all my medication including repeat prescriptions, arranges any outings including medical.

These proposals seem to be too complicated.

DCC should not be applying cofunding charges to any person registered with Special Needs/Learning Difficulties. Who are unable to work to supplement their benefits.

I like the current cap. But if it must be changed then I would go for the lowest level of charge on disposable income which I think is 80%. I feel this could be a huge change for people like my dad and wonder if the change can be phased in to reduce the impact?

People on ESA and pip benefit shouldn't have to make any contribution towards their care. Social care services should be free. I feel it is a tax on the disabled.

I feel this takes away choices of where to live etc. It may stop people living the life they deserve. Disability is not a choice. People with a disability also have needs + goals + we should enable them to attain these.

Someone who has worked their whole life until needing care might have savings but someone who never has worked gets everything free. I don't think this is fair.

No more than 50%.

There should be more financial support for single parent carers of young adults. When the carer is unable to work due to caring duties and inability to get such time off a job (i.e., 10 weeks summer, 4 weeks Christmas, 2 weeks easter, half term etc.

If we have to pay. 80% disposable income we would pay.

There should be no changes to current arrangements, as costs implications financial worries add to carer stress/burden who already face financial uncertainty re full time carers.

Disposable income especially for those in receipt of disability benefits is to allow the person a better quality of life and to actually live to a level of comfort. This should not be accessed for co-funding.

People with disabilities are not choosing to be unemployed or reliant on benefit. Why should they not have the right to have a holiday with any disposable income. A treat the same as someone who has a wage.

The person needing care would have no control over their own money.

Disposable income should not just be what's left after the MIG is applied. Disposable income should also be calculated based on needs. This means factoring in a realistic assessment of support needs, real care costs in the marketplace and disability related expenditure. DCC needs to factor in the real cost of care in the market, not what allowances it would like to give, because you can't recruit or retain at hourly council rates, in our rural area, care is even more expensive

Day to day living costs is significantly more for someone living with a disability - more heating is needed or health deteriorates, people can't shop around for food or clothes or insurance bills etc. All domestic bills have already increased significantly too - including food, people are still contributing a notable amount each week under current levels of the councils' financial assessments.

I completely disagree with the use of any disposable income in these assessments. This discriminates against people with disabilities who are already struggling with the cost-of-living crises.

Regular monthly expenditure should also be considered in addition to minimum income guarantee. During disposable income calculation i.e., heating bills extra care costs running a car (isolated living circumstances).

I can look at it from my own situation, but I also want it to be fair on everyone.

According to the govt. Guidance all of a person's income above the MIG should not be taken in charges, via one-size fits all approach.

DCC MIG at the current rate should be retained. No cap on co funding charges above mig.

Remain the same.

The proposed increase in tariff income would be far greater than the likely interest earned on the capital if in a savings account!

It should remain at the original 50k limit

I served as a serviceman 24 years and have an income on £500 a week as income. I am disabled and the income is as a disabled person. I was discharged with a brain haemorrhage and was unemployed. However, people who are unemployed receive there housed don't pay.

If this was the only change and you had the £51.00 cap that would be better.

Are these proposals being made, to take the financial burden of Derbyshire County council, and put it on the council tax paying public.

Because of the cost-of-living increases.

I see this as a way of dcc taking more money off of people in the community.

I suggest you would be doing a grave disservice to the elderly who have already paid a lifetime of contribution. I suggest you scrap these proposals and go back to serving your citizens.

I strongly disagree with the proposed changes to capital assets limit and tariff increases because it takes away the incentive for disabled people to work and be prudent with their finance and discounts the additional costs that disabled people in their efforts to live and independent life and contribute to the economy.

Stop taxing the sick!

The capital feels wrong not including home, should include assessment if people have second or more property assets.

These proposals do not address all the extra costs, outside dcc provision that disabled people face e.g., taxi's dietary requirements, transport to more appointments, cost of medication.

Our father has earned his capital assets he has worked hard his whole life to pay off his mortgage and owns his house to take this off him to pay for his care is disgraceful. People who could not care less about working or contribute and in some cases, claimed benefits their whole lives would get all their carefree. How can that be morally right?

Stop penalising people on benefits on their only source of income.

The proposals are fairer as they are in line with what people pay in residential nursing homes. It is not fair how those needing support living in the community is allowed to have more capital assets before they must pay towards their care.

Any person who has worked and saved all their lives should be allowed to leave their gains to the family. The care when required is exactly the same for those who have worked all time and for those who have never worked and exploited the system.

Again, I don't fully understand the ramifications but those who have worked hard + save hard should not be punished + have to pay more for the same care than those who have squandered + spent all their money.

I do not understand your questions see q5.

What they get they should keep.

I have sent my bank statement to you so you can see what I get and what comes out.

No more than 50% of savings should be counted.

Individuals have lived to their means. Cannot afford these increased costs.

It would be costly to assess it an unfair on those who have been careful + saved up. There should be a standard rate. There should be national rates + not a postcode lottery.

All benefits should be means tested leaving my daughter exempt. You could use the money you saved when covid 19 shut down England, all the places were closed obviously being group sessions to keep users and staff safe, my daughter and I would imagine lots of people couldn't access the facilities (day centre/respite care) so her and many others budget from social care wasn't used and run into millions of pounds.

With the rate of living costs rising this amount would only just cover funeral costs/solicitors etc. For savings.

This completely penalises people who work and save- instead encouraging people to not work and to spend what they have. Each council should have the power to set its own limits/ values do not take the national.

Disabled already pay for own wheelchair/ aids every month.

I think if you were to keep the existing system but increased the current assessed amounts by £10 or £15 p.m. pending on the individual's contribution this would be 20%-30% increase in contributions surely this would help the funds for social services.

People with disabilities who have savings from when they were able to work should not be penalised.

Some disabled people don't have capacity to manage their own finances and so shouldn't be penalised for savings to aid their standard of living I plan for retirement without a pension etc/funeral plan.

What happens if you have none.

Please leave it as it is. Unfair to change the calculation basis, particularly for those already receiving care. Unfair to change from 1 arbitrary figure to another regardless of the national rate.

People with disabilities should be able to hold capital like everyone else without being penalised for it. It should be kept at higher capital band cut. + higher than £1 in 500

Capital assets should disregard any savings set aside for future funeral costs. Perhaps the calculation could include an allowance e.g., £5000 or an average cost of funerals.

Just another attack on people who have worked hard and saved their money. People who have not worked or spent all their money don't pay anything.

Again, this is looking at ways to penalize the disabled with no interest in their struggle coping with disablement. Shame on you all.

Again. Proposals take no consideration of expenditure necessary.

I agree this system seems a much fairer way as it allows income savings to buy essentials + replace items etc.

Should make no difference what capital people have. Should still be entitled to care if they need it. That's what national health and social care mean care for all!

I don't believe that peoples hard earned savings should be taken into account and that people should be penalised for having been responsible and saved money for retirement. We have the highest levels of tax ever and social care should be funded from this. Looking after the elderly should be the first priority of any civilised society.

There is no mention on this questionnaire regarding the care cap being set at £86k for everyone, nor the full increase planned for 2025 from £23.5k to 100k?? How can you be asking for answers without providing all the context surrounding what is a huge decision?

Pip is not means tested so why should your care be. Why don't you charge everyone £51 -07 per week towards their care that is fairer just like Yorkshire do. And you would get more money this way as if people are ill, they get dale or pip and stop paying agency's a huge amount per hr when they only pay carers minimum wage!

£50,000 is a sensible amount to allow people to have. Leave it be. £23,250 is a pittance in this day and age.

Why should I pay more. When there are thousands who don't pay anymore. There is something wrong with the system.

Tell the big bosses to take a wage cut.

Leave it as it is

Again, every individual regardless of capital should be treated the same. There are plenty of benefits that can be applied for.

I think it could be very damaging. The older I get the more care I am needing. Care I am paying privately for on top of co-funded council care, currently it may mean that changing the requirements means I'll have less funds and could contribute to me selling my property an asset to fund further care, instead of staying in my home.

Current tariff income assessment equates to an interest of 6%. Seems high?

The cull is to rise to £100,000 from October 2025 so it is recognised that £23,250 is grossly inadequate and utterly unreasonable for those who have accumulated even modest savings during their life. According to retired living standards UK. A single retired person requires an annual income of £23,300 to live a moderate lifestyle. This could be used as a basis for the amounts of self-funding. If anything, given the increases in the cost of living the cap of £50,000 should be increased.

If you have the capital assets figure to £23,250 and still take £1 per £250 limit that would cost disabled people a lot more which again would mean the difference between care. heating or food.

I am baffled what on earth is this world coming to where is our NHS where is our government helping because we as a couple are on sick benefit that so far, we are not listened to, and NHS is supposed to be free.

Old people who have been frugal and worked hard all their life should not be punished for having modest savings especially when those who did not work will not have to pay more.

They shouldn't be assessed!

With the introduction of self-assessment (which most elderly people would not be able to do!) Who is going to monitor that people are declaring all of their capital?

With the introduction of self-assessment who is going to monitor that people are declaring all of their capital.

Increasingly difficult to understand these questions.

Again, when means testing the whole of a person's situation needs to be assessed. They may live in 'their own home' but said home may not actually belong to the individual.

Why are you changing how you currently calculate contributions? No problem with the current arrangement.

Again, targeting most vulnerable. People lose houses or have to sell for care agree need to pay but already been taxed + worked for it!!!!

Have no capital.

I believe that with the present cost of living that £14,250 is dangerously low to start relieving people of their capital.

£14,250 is too low to be taking an individual's capital.

Seems you want to make people struggle more to save yourselves money

Someone who has 3 hours care a week should pay less than someone who has 40+

People with mental health should still have to contribute. System unfair.

Disability living allowance/attendance allowance and pip should be taken in all cases as money for care should not be paid twice should not be based on savings for people who worked.

Respite should be same for everyone too many carers using pip/dla for themselves and not the person.

All people should pay same and not have to use savings.

Again. Your scheme has been very generous. Moving from this to the national scheme in one fell swoop is likely to see people refusing care or trying to manage with less care than they need in order to reduce costs. Could you move to the new position in a staged way over 2-3 years?

How about a limit halfway between 23250- 50000. I.e., 36750 or 35000.

I think the present system is fair and square and doesn't need changing.

Under our personal circumstances we would like things to remain the same.

People who need care should not be charged anymore. I am struggling already.

I have never heard of disability related expenditure. Please send me a form.

Every week can be different needs with disability!

Anyone receiving help with care should've been made more aware of benefits that they are able to claim. As I wasn't aware of disability related expenditure.

I have MS and rheumatoid arthritis; I find moving about extremely hard I can no longer shop. I have to order in the thing is I don't know when things will get any harder my sister helps me, I have carers come in and keep feed me and shower me I am 52.

More clarity is needed regarding 'evidence'. What exactly would be required? Is this just another way to make claiming difficult and a way to deter potential claimants?

If you are cofunded- the proposed charges are too great. Cannot Derbyshire have a limit midway between 50k + 23500? I.e., 36,750 at 35,000.

As capital is counted by the council at this time is reasonably fair. But the council seem intent on following central governments way of counting capital. Due to lack of funding by the government the council will probably take as much as they can off claimants.

If you save for things your penalised being disabled, I desperately need a new kitchen to help me become more independent but that will not be considered!

Use council tax benefit system to assess.

The disabled and vulnerable in society have little reserve in their benefits in a cost-of-living crisis to cope until the proposed reductions. It is immoral and irresponsible.

£50,000 as a limit allows for unexpected expenditure for example replacement of a boilers, house repairs. An even a decent holiday!

I am concerned that people are already dipping into savings to pay for additional health services - particularly hearing services, assistive technology aids, wheelchairs, mobility scooters etc. £23,500 doesn't go far especially if people are in own homes + may need to pay for new boilers roof repairs etc.

If I was in a care home all of my outgoings would be covered. As I live in my own home, I am responsible for all outgoings including the maintenance of my property, which will have to be sold to pay care home fees in the future, if necessary.

If people have paid their taxes, why do they have to give you, their money! You have a duty of care to everyone!

Start charging at £20000.

Your whole assumption is wrong re capital and your assumption of 'regarded as receiving' says everything about your policy you assume guess but take real money off real people. How does this capital give those real people real money every week that you then claim you are entitled to. It doesn't exist it isn't real income.

£50,000 limit should remain, this is not a huge sum. People around the £14k - £23k level will have fluctuating levels of assets during the month depending on the date of the assessment + when income is received each month.

There simply cannot be parity of capital assets for £23500 being cared for at home by their husband say and a care company and the same threshold of capital assets of £23500 if requiring a nursing/care home. The husband, say is giving up his life to care?? And being there. The couple require capital assets

when owner occupiers safeguard ability, to pay for unforeseen events requires. Currently my car, boiler has failed & our capital will be required to replace it. 25-year-old car will fail.

Not known.

Capital assets. I disagree with changes round this- these are savings, there is a cost-of-living crisis- this money should be available to support care in the home + by family.

As with everything these days those people who have worked hard all their lives + been careful with their money so they have some put by are penalised whereas someone who may have earnt a similar amount but has spent it all will get everything paid for them. This doesn't seem fair.

It is grossly unfair to consider taking more money from an individual's disposable income. It is even more unreasonable as pensioners and the disabled are already struggling with the cost-of-living crisis facing ongoing huge increases in food, heating and household products. What would be left for large ticket items? E.g., to replace my top loader washing machine would cost £450. I need this type because of my carer's disability.

Most parents/ carers who I have spoken to do not understand this form and feel threatened by it.

Take living costs into account such as board/rent.

A short-sighted proposal as this would lead to more elderly people put into full time care- the bill for this would eventually fall to the council as assets were quickly used up by individual costs. Rather obvious really and medium term would be very costly.

You are unfairly penalising people who have worked hard, paid tax/ national insurance all their lives, and tried to save a bit of money rather than frittering it away.

Keep it has it is we would like to live.

If a person has capital of say £40,000 for example and the new proposals come into force. Will the person have chance to spend the £17000 over on property maintenance or building work before that amount is taken by the council? It seems extremely harsh that hard earned money and nest egg/rainy day money can be taken away, when others who have squandered their income or never worked get free care.

Should be an individual benefit this form frightens working class people with? Savings.

It should be changed gradually not all at once.

I think that everyone should be treated equally and it's unfair to penalise people who have savings.

This is an attack on lifelong savings.

The people who have more, should pay more for the care they need, the council can then use more for the neediest & vulnerable people in the country.

Someone who has 3 hours care a week should pay less than someone who has 40+

People who need care should not be charged anymore. I am struggling already.

As capital is counted by the council at this time is reasonably fair. But the council seem intent on following central governments way of counting capital. Due to lack of funding by the government the council will probably take as much as they can off claimants.

If you have no capital at all you shouldn't have to pay anything to care.

If these proposals were adopted people would find their savings depleting rapidly, therefore they would be punished for having a disability.

I think that allowing people to previously build up savings to £50,000 and to now take it away is unfair. The council should also take into consideration that some people have savings to enable them to pay for equipment or large items i.e., an adapted vehicle or wheelchair that cost large amounts of money and aren't provided by any other means.

Council needs to confirm all information given.

A person living in the community in their owned home also has maintenance cost associated i.e., gardening, general maintenance of. Path drives and of the property. There is no assistance with these costs, they are paid from savings!

Can't pay.

There is just no support for families who have loved ones with dementia. Nothing. From no one, neither DCC nor health. We have been waiting months for a social worker to be allocated for my father so they can assess him for co funding. The only support was going to be financial through co funding and now you are talking about taking that away.

Tariff charges should be in line with other means tested benefits.

Capital needs to be assessed as a means to additional income. However, there are certain circumstances where disregards need to be put in place, for example if an individual is living in long term supported care and does not

have significant expenditure, they may save more than they spend because they are unable to manage money, they should not be penalised for this.

14,000 is a low amount of money to be doubling their contribution. There will be no inheritance for their children which will leave more people struggling in later life. They also need money to enjoy for holidays, activities or even essential spends like home improvements and repairs.

Even at £1 per week income for each £500 this assumes a rate of return at 10.4%, reducing the level to £250 would mean a rate of return at 20.8%. An assumed income of £1 per week for each £1000 would still assume a rate of return of over 5% but this would be more in line with current rates of interest and takes no account of the expected fall in inflation and the subsequent reduction in general interest rates.

Don't penalise people for scrimping and saving all their lives just to take it away again.

I think national criteria should apply so that all councils are treating people equally.

It seems wrong to change it for people who are already assessed under this. Why not change for new applicants only.

Think it is absolutely disgusting that what people have worked hard for has to be used to pay for care when they have already paid into the system with tax and those people who haven't worked or who have spent their money can have their care costs covered!

So, lets punish those who own their own home and have not been a drain on society? Really? Time that your house was excluded from this calculation completely as it is yet another tax on working people and with house prices at current levels totally inappropriate. The value of your home should be excluded, or you punish everyone for the incompetence of the few.

Margaret Thatcher encouraged people to buy their council homes, so they had to work more to keep them in good condition and work more to pay bills and save for a pension and now a Tory prime minister is penalising these people when they are having to deal with bad economics and government policies.

It is encouraging people to not save money or own their homes as they age or be penalised for doing so. money and houses are usually saved by people who have worked hard for it and wish to see their own family benefit from this, not to subsidize others who have never worked or have never saved.

The government need to stop meddling with a system that works.

People sometimes have savings as they are saving towards something e.g. I am saving for a new bathroom. It's not savings for the future it's for a reason. I have looked after my daughter for 40yrs, and I don't get a penny towards her care.

If people have the money, then they should afford to pay the increase.

This is a terrible thing you are proposing. Those pensioners who have worked all their lives and have built up savings are being penalised.

There needs to be transitional support for people most impacted.

The Tariff income does not represent reality, current savings returns are below the rate being applied.

The national amount is too low should be no lower than £36,000-£40,000 would meet most people's needs. 1 in £250 is very low should be at least £350 -£400. The government have set amounts too high. The council are looking at people's circumstances and trying to be fairer. If funding doesn't increase by at least 7% then the council should Lower amount no less than £350.

The UCL will rise to £100,000 from October 2025 so how can DCC justify proposing to lower their limit when it really should be raised, bearing mind the cost-of-living crisis currently being endured? £23350 can in no way be considered a large amount of money and is coincidentally almost exactly what Retirement Living Standards considers to be required for a retired person to maintain a moderate" standard of living for 1 year!! The proposal is punishing savers in an unjustifiable and cruel way.

The proposals are a drastic change from the current situation. Under the current rules I cared for my late mother who had less than £60,000 in assets (hardly a fortune). I am angered that under the new proposals I would lose most of my modest assets if I we're to need care to remain independent at home.

The major reduction in capital assesses limits proposed is far too great a change. Some people could go from paying nothing for their care to paying everything - perhaps £2000/month if they need 4 care calls a day. This has to be wrong. The change if any should be much less and phased in over several years.

The amount of capital needs to be increased not decreased and the level nationally and locally should be more in the region of £90,000.

Disagree, though she doesn't own anything as she can't go out and earn to acquire any assets!

It looks so wrong to be penalising the most vulnerable in the community at a time of such uncertainty and austerity. I think that a less drastic approach would be more appropriate at this time.

I feel that people who have carefully saved their hard-earned capital should be allowed to retain more of it for their own benefit.

I understand the reduction of the upper capital assets limit, but disagree with the tariff system.

I think the current rules are harsh already so in no way would I support a measure to make these harsher.

Unfair that married couples can have saving at 50,000 when a single person (23,500) may be more in need of savings.

Your proposal penalises those of us who have lived frugally all our lives and have savings. While those who spent everything, drank and smoked will be funded by you. Completely unfair.

As long as it's assessed individually then that would be fine.

The Council just like always wants to rob us and feed their selfish greed.

I find it disgraceful that Derbyshire County council are stealing money from disabled people who have few or nil assets. The County council are planning to take more money from disabled people who find living difficult and have very little money and if dcc have their way these vulnerable people will have their co-funding increased by around 100%.

Compassion for human life is important whether you are rich or poor, and if the wealth was spread all could be comfortable.

Derbyshire should be brought in line with the rest of the county. I would prefer this than closing services to make up the shortfall.

Think all care should be free.

Income assessment fine for this as tariff income would be offset by interest earned.

I accept the rate for capital needs to be lowered to generate more income however the drop proposed is too much too quickly.

I believe the £50,000 limit should be retained. I do not think the tariff income should be increased - £1 income per £250 is totally unrealistic, at 20.8%, forcing people to further deplete their assets. The council also needs to improve the process of funding capital items & modifications, as people are currently using their own money for modifications, due to the length of time

that it would take the council to do the work, which would become unaffordable under these proposals.

£1 per week income from £250 = £52/year. It would require an interest rate in excess of 20% on a basic savings account which is impossible. A fair rate to charge would be to equate the cost to the average high street interest rates available which is currently about 4%. £250 would produce an income of £10 per year. I.e., 0.20p per week.

Where are you looking for these returns from savings absolutely ridiculous.

I do not believe that £20 is sufficient. People with additional needs in the current financial situation where costs are high would suffer. How would somebody afford to pay for their additional costs? They will need evidence to support a case but will not be able to get this without the money in the first place.

This will only increase costs as more cost will fall on the council as there will be no incentive to provide for yourself.

Capital should be exempt from calculating social care contributions.

I don't disagree with lowering the capital limit (to higher than the proposed figure though) but to double the contribution on the sliding scale in one go is unreasonable.

You cannot assume a fixed rate of tariff income unless you are sure this could reasonably be achieved under any circumstances. Investing capital in say a fixed term ISA does not produce income until maturity so having to pay tariff income assumes an 'income' which surely limits investment opportunities?

Taxing the working class literally to death. They have earned their capital, so why should they be discriminated for working hard compared to others have spent all their income or been on a benefits system all of their lives.

See above! What does 'tariff income' actually mean to someone who's not in either social care or accountancy?

Most people get very little interest on savings. The proposed new limits are too high. Most savings lose value because of inflation.

Taxing capital in this way prevents the elderly, or people requiring social care, saving for the maintenance of their property, which ultimately leads to a deterioration of the housing stock in the area.

Any increase in the cost of DCC charges for care would have a direct impact and reduce our income. My dependence on my husband's care would not be reduced but my financial reliance on my husband would be increased. My

demands on him would remain the same but my ability to contribute would be significantly reduced. (Please read as a continuation of my first comment).

Council is just again trying to increase there take from pensioners.

Stop penalising people whose sole benefits is their only source of income.

Extra cost is much more than £20 per week at current costs.

This would need a strict supervision as it could so easily be abused by those who know how to exploit the system.

I am educated to degree level and have no idea what this question means.

I do not understand your questions see q5

Do not understand the question disability expenditure should be set nationally + not locally.

Would need to be realistic expenditure - electricity heating etc.

£20? With the cost of living so high is a joke.

I believe a standard charge would make admin easier and probably be more cost efficient.

Disabled do pay towards other things as NHS as had cutbacks.

When initial assessments were done for my severely autistic son were carried out, the forms and hoops we had to jump through were exhausting, repetitive and sometimes dismissive and lacking empathy, treating people in this manner is appalling, so to suggest further reviews as to how disabled someone may be is wrong.

Was not aware of entitlement to disability related expenditure.

Would someone receiving only 3 hours pw care pay same as those receiving 20 hours.

Change should never be more than care component part of pip or DLA allowance.

It costs to run an electric wheelchair, electric bed, extra laundry due to incontinence, electric toilet with wash function. It also costs to have heating on higher to prevent risk of hypothermia due to inactivity 1. Life in a wheelchair.

You are making disabled people who need care into even more of a stigma an having to jump though unnecessary and humiliating hoops. I am disgusted.

I am aware of the Norfolk enq + that is why this form is being set out. Its confusing + difficult to understand + families are bullied + told they don't need to provide any information but their savings and mortgage housing costs.

Every expenditure a disabled person has should be accounted for. The council should be forthright in asking for this not understand + elusive.

Some people worked all their life took ill had to keep selves for 2 years before claiming benefit then no one would help as own property and what money left was penalised till gone then have to ask for help still get no help.

This is an attack on the disabled again!

Never had any benefits and DRE isn't something I've heard of. Is it practical?

Being disabled in this day is costing a lot more money. Our electric bill is £8125.000 for the year.

Not clear what happens with mobility payments from pip are they a disregard

I feel this could be open to abuse, too is nothing considering the c.o.l + utility increases benefits have not increased by the same so too will go no-where.

Everything is more difficult when disabled. You have to fight for everything. This should be made easier to access care financial or otherwise.

Attendance allowance and disability living allowance etc are already in place to help with this and cover additional costs incurred if you have a disability.

In essence you are changing an already complex system (again) and making those with disabilities (and their carers) re-apply for what they may be entitled to.... What planet do you all live on?!

I would expect there to be some form of reporting from dcc on the success rate of applications to increase dre. Also, for people in supported living, landlords set the amount people will pay and there is no way to make any savings by the individual.

My mum is 97 this year. She needs a stairlift for which a maintenance agreement had to be made, has 4 carers and additional help. A gardener and cleaner are also now needed, together with transport.

I feel that people should not be paying for their care.

However, suffering with dementia & Alzheimer's and mobility issues, I don't qualify for disability therefore this may not affect all care receivers.

Disability expenditure, I do agree with it to help towards cost of heating and laundry cost.

Clearer on what may be considered as disability related expenditure and the opportunity to increase any disregard seem helpful.

Cost of living energy rising cost.

For those who are severely disabled they should receive more than £20.

£20 a week is too low the payments received for dla etc should be totally disregarded.

Make it clear how to assess disability related expenditure- should Day centres be included in this.

These people are unemployed but cannot show disability. I as a serviceman can and do show disability!!! And pay the full price of rent and council tax.

More paperwork and "evidence finding " for what is already a stressful job. Surely the social worker can give an indication of a clients need. It's pretty obvious for some clients, that they need more heating and the washer on every day x2. Incontinence and immobile.

My husband gets full a/a I've got severe arthritis and I have been declined attendant allowance and I still care for my husband who has Alzheimer's disease.

See previous answer> the disgusting disregard should take into consideration the actual costs of living as a disabled person- research this as I did and work from there?

Again, Derbyshire County council taking peoples hard earned money off them. iniquities to charge on 90% of the person remaining disposable income to charge 80% of the person's remaining disposable income.

This proposal is both mean and callous and discounts the difficulties many people face in life.

Many extra often hidden costs for disabled people and these must be taken into account.

Disability related expenditure would be, in our father's case, more than £20 per week, washing cleaning. Specialist diet, transport, equipment, maintenance, etc. Maybe 20-50£ per week.

It's hard to access disability related expenditure or justify i.e., additional heating but it is an issue when mobility is low.

I do not mind paying my share to live in England, but I do not agree to penalize people that have no choice but to sell their property in order to live. Help should be given to them to keep their homes.

Keep criteria the same as now with no changes.

Those claiming this should show proof of their needs.

Antidisestablishmentarianism

The disabled / vulnerable should not be charged at all they have hardly any disposable income as it is. Being charged for day centre care when days have already been cut is also unjustifiable. Especially as those who attend have to bring food-pads-clothes etc already.

There are many things that should be taken into account. E.g., moving close to family to help with their care may mean, more expensive housing costs and other expenses. Some consideration of the bigger picture on an individual basis should be taken into account.

Social workers should automatically provide information on DRE to clients. Been overpaying for years because I didn't know about it.

Every person's needs are different, so there should be a fair and proper assessment of each person's DRE, not a standard £20 for each person.

Examples of the DRE - as above is slanted to the physical disability. The mental disability can often increase a person's costs - please take this into consideration.

I think the practicality of this will be very difficult and over as on all sites. Perhaps a system of allowances could be adopted. For example? / Sites the need is an extra 3 clothes washes a week seems difficult task to get a? Result.

People with long term disability are more unlikely to manage their heating and appliance themselves. They have more washing, need more heating and a healthy diet.

I re-paid my national insurance and tax and now the social security takes my pension because I am on benefit even though I paid a pension since age 18. I've paid enough.

Don't think we should pay for the help I need.

If someone is disabled, enough to receive attendance allowance etc then they obviously are in need of care. This should remain front and centre when considering changes.

People must not be without adequate income.

More fairly taking into account a disabled person may need equipment not available from referral to appliance providers or extra aids. The assessor to have knowledge of a disabled persons personal requirements rather than an employee sitting at a computer making decisions.

The process needs to be pay partly all responsibility on person who may not be able to understand or undertake process again leaving vulnerable people not able to eat or heat home or accept care.

People who need to run or buy equipment as a direct result of their disability should not be penalised.

Much clearer and really available forms required.

Obviously, this should already be in place!

Judged fairly.

Essential to ensure the people who need the extra money are receiving it.

Essential to ensure those who need extra money have it.

It is important to support those whose disability require additional living expenses to support them - i.e., power for necessary equipment, hoists etc and maintenance of that equipment

I have never heard of disability related expenditure.

Every week can be different needs with disability!

Given increased cost of fuel. Other items, I feel £20 pw is on the low side. My housebound relatives heating costs are particularly high. Some people may not have the support to collect evidence and apply for a higher disregard, so you should not make the process too onerous.

People have extra needs they should be allowed extra money.

Find these questions difficult to understand. I do not like change.

Find these questions difficult to understand. We think our contributions are fair.

Disabled people unable to work should not be charged anymore. Increase council tax per household. We have already paid in our council tax and other taxes for these services in advance.

The gardener charges £20 an hr never mind chiropodist, hairdresser, shopping plus other help.

Seems fair that people who qualify for this should get extra if their needs/requirements are more.

By leaving the claimant with enough money to live a decent life for few years that most claimants have left. (That is how it should work) when things are changed.

It would be useful for council to listen to the extra weekly expenses people living with illness and disability have before deciding what is considered dire.

We already have to prove effect for pip/attendance allowance as stated earlier. Daily living allowance (includes personal care but is not exclusively for it is it carers food heating etc as well.

It should take into consideration allowance for getting people out and about who are basically housebound, this helps with physical and mental wellbeing for the person.

There are so many health-related services that are no longer free of charge - chiropody, podiatry, dentist, ear syringing, hearing aids, wheelchair servicing, emergency call services - all these should be taken into account along with additional laundry, cleaning, hearing etc.

At present I get no additional support, financially, in terms of my disability.

£20 a week sounds very fair.

But minimum £20 should remain.

This does not provide enough information to enable us to make an informed assessment.

Made up figure with no basis explained. A few crumbs that you want to throw back at people. Take money from people who are able bodied can earn more and can fully enjoy everything in life. Ever heard of equality is not treating all the same it is supporting the less fortunate.

Cash payments must be allowed as many disabled people pay for such help by cash as they are unable to write cheques or use electronic banking. Clear rules need to be drawn up.

Not a clear question. People have lots of different challenges.

We did not realise that people could currently complete a disability related expenditure form for he finance team to consider.

When you care for a partner with double incontinence and say dementia - electrical costs for laundry washing and drying, purchase of additional bedding, night attire and heating is significant, beyond that provision of wet wipes, additional bed pads etc. Currently for example, must replace our gas boiler to a more efficient one.

I have a Motability car which I need as without it I would be totally house bound which costs me all of my pip mobility allowance, but this is not taken into consideration at the moment, dcc assess me as if I have this income in my hand which I don't.

The dre figure of £20 is too low. It needs to be at least £50.

I need to come to the meeting and discuss all of this with a person who can shed light on all this obviously you want more money from us!

Twenty quid covers nothing in this day and age following the cost-of-living crisis - why bother!

This seems fair, as long as it doesn't make it more difficult for people who have a disability related expenditure exceeding £20 per week to get this considered.

All it will do is protect the same people, who are on pip and disability allowance.

Some clients need more care than others. Some are able to pay more.

Disability disregard should include all additional costs which are expected to be borne by the disabled person. For example, a wheelchair adapted vehicle costs the user in excess of £1000 per year, in our experience.

The proposal seems fair in the fact that people with a genuine need should still be able to get the help that they need.

There should be consideration for the cost of continual expenditure for the disabled.

Need to consider wider options for people with neuro-disabilities like autism, adhd etc. Life is expensive due to restricted diets, forgetting things, sensory needs and more.

Given increased cost of fuel. Other items, I feel £20 pw is on the low side. My housebound relatives heating costs are particularly high. Some people may not have the support to collect evidence and apply for a higher disregard, so you should not make the process too onerous.

People have extra needed they should be allowed extra money.

I feel unqualified to answer this.

Don't really understand this proposal!

Evidence. Confirmation.

It would seem you already have this covered with asking for proof of purchase etc.

Won't pay.

A disregard does not take into account the many people who pay additional rent, and this will be worse from 2024 when Managed migration starts. A predetermined list can be detrimental if there is no flexibility for other

expenses to be taken into account e.g., cost of living crisis and the arrears people will have accrued.

The council should consider higher expenditure due to disabilities, for example those with limited mobility have to have their heating on higher to reduce risk of hypothermia, it costs money to charge electric wheelchairs, operate profiling beds, and wash/tumble dry more laundry due to incontinence.

Everyone should be made aware that it is an option and that you can apply for more if your expenditure is higher than £20.

The additional £20 per week for everyone is a good idea and should be implemented. This should NOT be classed as 'Disability Related Expenditure'. In addition to this £20 there should also be any 'Disability Related Expenditure' allowed.

£20 disregard is ludicrous, with heating bills and food bills rising people have to choose between heat or eat or having carers in. £20 doesn't go far, maybe senior officers and Councillors may want to try a month in the shoes of an elderly person who needs care.

This depends on what is "evidence" - how do you provide evidence that you have to wash your bedding more frequently due to illness? As with most of these proposals incredibly badly thought out

Do you know how much it costs for some disability assistance and aids and how difficult it is to cope in modern life.

Should be made clearer what people are able to disregard and if information is not given to people how are they supposed to know to ask for it.

Thinks it should be made clearer to clients and they should be given the information as if they don't know about it, they wouldn't know to ask.

I think this is difficult to prove as every day is different. At times she has unexpected expenditure.

In some cases, it is wrong to charge because disabled may use more electric / gas & water because of their disability.

It should be made clearer to people.

I do not think elderly people should have to explain the costs related to their disability. I think this is demeaning and not practical for certain disabilities such as dementia care needs.

The council needs to actively enable people to claim DRE with dedicated officers, and no additional care charges should be introduced for any individual without an assessment of their DRE and additional benefits

Disability expenditure needs to be subject to ongoing review against market conditions as these fluctuate continually.

Look at people's circumstances increase amount to £35. £20 is too low for disabled people needs to be £30.00 much more realistic. We know some people will say much higher amounts. You have to be realistic. All depends on councils grant.

Yet again disabled people have 'jump through hoops' to explain why they need money to live with dignity. In my experience, most disabled people have enough explaining to do already.

It would be demeaning to ask people to prove disability related expenditure possibly relating to incontinence. Also, the £20 disregard is too low). An alternative would be to link it to certain disability benefits as follows: lower rate attendance allowance or PIP with components at the lower rate only - £20 disregard; PIP with one component at the lower rate and one at the higher rate - £30 disregard; attendance allowance at higher rate or both components of PIP at higher rate - £40 disregard.

Cannot comment as I have never completed a disability related expenditure form, but what I do know £20 per week to cover my son's medical equipment is not enough.

Make it easier not more difficult!

As long as it is transparent and fair it should be fine.

I have never heard of disability related expenses disregard before this, however if the cost of co-funding rises to the level you are proposing this is meaningless and disabled people will still be significantly out of pocket.

Disabled and vulnerable people should receive more money, so in this case I agree that disability related expenditure should be more and easier to claim.

However, £20 may not be enough and a higher amount may need to be considered due to rising costs and existing commitments (subject to personal change).

£20 per week is insufficient to reflect the additional costs relating to a disability. It should surely be closer to the Attendance Allowance level of £68.10 per week.

Disability expenditure disregard of £20 per week is a joke. Scope research (Disability Price Tag 2023) states a person with a disability needs £975 per month extra to have the same standard of living as a non-disabled person. And disabled couple need £1248 per month. Your proposal is discriminating against those with disabilities, not helping.

Why even think of change when you can't uphold the law yourselves.

I don't understand the £20 question.

A medical assessment should be made annually, by a professional in that disability.

Not enough info on current DRE arrangements.

It is difficult to quantify all the expenses relating to disability driven expenditure. It can vary from week to week and there can often be one off high expenditure items that can easily be missed when supplying details to the council.

DRE needs to include expenses to help with mental wellbeing (hair, chiropody etc). If someone can't afford to feel good about themselves, their health will deteriorate, and will end up costing more in the long term. I am speaking from experience here!

Making these changes feels discriminatory towards people living with long term conditions who struggle already financially. For example, supporting our service users who live with head injury, stroke and complex neurological conditions, part of their disability related expenditure may include smoking if they live with anxiety, depression and psychological issues however it is already nearly impossible to have that considered as essential expenditure.

Every disabled person is different has different needs which requires different care, aids so a form to fill in would be helpful.

Clear rules need to be set, and the council needs to be aware that many people pay for such support in cash, for which they won't have receipts.

Make people aware of this form, the majority do not know of it.

People with disability have a real need for additional funds to make their life work. People who are genuinely unable to work because of disability should be supported as a priority.

Assessment of a disabled person's needs should be done face to face by experienced health experts and require evidence. A generic questionnaire cannot possibly ensure a fair assessment

It is so important that this is assessed realistically. Heating when someone is immobile, laundry when someone is incontinent. Protection for beds, chairs etc. Wipes for personal care several times a day. PPE where family carers are required to assist with personal care. What and tear on doors, skirting and walls from wheelchairs, hospital beds and hoists.

£20 is not sufficient for those with additional needs, especially in the current financial climate where costs are rising, including utilities. How would somebody afford to pay for their additional needs without having the funds up front? They will need evidence but will not be able to obtain this without the money in the first place.

£20 is not enough for those with additional outgoings. People have rising costs in the current financial climate. How would somebody afford to pay for these costs without having the funds up front? They will need evidence but will not be able to obtain this without the money in the first place.

£20 or any like figure does not remotely cover the additional costs caused by a disability

‘Currently, people who consider that they have additional costs complete a Disability Related Expenditure form and send this to the finance team to consider.’ ‘This would ensure disabled people and people with long term health conditions who incur additional expenditure could have this considered when assessing the amount, they would be charged.’ Are these not the same thing & if so, why are you proposing them as different?

Staple people should have a full disregard on all care expenses going forward Surely that’s very complicated to do? Once you have a ‘policy’ there’s then no flexibility in assessing other things that aren’t on the list. Council officers aren’t empowered to take decisions outside the policy/agreed list.

I feel a face-to-face review would be more appropriate than a paper questionnaire

Maybe arrange to meet the person and see what the situation is and why they needs are as they are not just through a piece of paper

I have already commented on this in an earlier box, however £20 per week is too low as a standard.

It certainly should be reviewed and why have we only just found out about this.

It would be good to have clear information about this. Can it include costs such as cleaning and gardening costs for those with disabilities who live alone and have care needs. Anything to be allowed for purchase, maintenance and running costs of e.g., Mobility scooter, stair lift or special socks/footwear required for oedema. Something already received towards extra electric for home oxygen machine.

Antidisestablishmentarianism

Families deserve to have the rewards of the loved ones work a savings. None of us want to leave this earth leaving the family with nothing. We work hard to give and leave our families with the best but if in our later years we need care the family seem to be penalised. At the moment the system is unfair to those who have property and money. We are taught that we are all equal, this is not so in the care fees.

I do not understand your questions. See q5.

Everything is fine.

I am sending my prescription to you so you can see what I am taking. This does not mention my attack and steroid.

Survey is complicated and hard to understand because of language used.

So many changes to structure so quickly. Individuals need time to adapt and change their current structures.

I feel this form has been worked in a very complicated manner so that the council can say that people were asked but didn't object

This is very complicated. Clear guidance for carers and what counts as capital needs to be given for individuals/carers. People who can afford their own care should pay but it is frightening to think income may decrease.

Older people will have and will still be contributing financially by council tax/self-funding contributions and or by taxation throughout their working lives. This proposal in all aspects is stealth taxation on the more weak and vulnerable in this county - shame on DCC! From a carer

I/we are happy to contribute to the care my mum receives - not sure of the finances but I think a cap should exist (£75) or at most £100.

Forms such as this are never clear as to the outcome of the proposed changes will affect the individuals and their carer/families.

Looks like these changes are to benefit the council not the people who need the funding feel that most elderly people will struggle to understand this questionnaire.

All of the proposals are unfair and will put a disproportionate level of stress & pressure on vulnerable members of our community and their families. Particularly those already receiving care. I am disgusted that the council have chosen to pursue these options for saving money. It is a measure of how civilised we are as a society. How well we look after our vulnerable community. This will be a very uncivilised & backward step.

Easier to understand. More transparent in why this is having to be done. There should be help for all disabled people to advise + help fill out this form.

I agree with the principal of charges based on ability to pay. The charges the council make compared with having to provide care privately are high value for money.

From benefits so get £163 month for me it's a joke really!! If we had never worked lived in rented property. We would have been better off. And probably wouldn't have to pay for anything instead. When left with £14,500 got help but still had to use it!! Till gone nothing left!! So, under your new ideas we wouldn't get anything!!!

This survey is a waste of time I am sure you will still do what you want to do and take notice of what anyone says you just want more money off who you can get it from.

These proposals attack the disabled - their carers- and add to the mental stress of both parties, with total disregard for their already disadvantaged life-shame on all of you!

Caring for someone is extremely difficult. You are doing a job you are not trained for and not paid for! You are an unpaid carer saving the care system thousands of pounds.

If savings are to be taken into account - this will be a disincentive for people to save money and more people will be pushed into debt and have to be funded by the state. It is not fair to penalise those who have worked hard and made additional provision for their retirement

This is all rather worrying, bearing in mind that I am charged with the responsibility of managing my loved one's finances whilst also trying to ensure his quality of life. It's also impossible to make savings. Food + fuel etc when these are out of my control (though I am watchful) I am completing this questionnaire on behalf of my X (35 years of age)

Co-funding should not be means tested, pip isn't people owning their homes need savings to do repairs etc everyone should pay £51-07 per week towards co-funding likes Yorkshire do and if this goes ahead I hope dcc funding dept lose their jobs as there will be no one left to give funding too absolute disgrace dcc care worst in the country government want to keep people in their own homes obviously dcc do not. Yet you close care home when there is a waiting list to go into them.

I am filling it in for my down's son x. He has severe learning, diabetic poor eyes and mobility, I don't really understand all the questions we have no savings, just my oap & money he gets my other son sees to X's needs.

On behalf of my mum, I have completed the on-line assessment. Mum currently pays £51.07. In each of the 3 proposals my mum's contribution would at least double for option 1 (127.36pw) option 2 (114.62) option 3 (101.89) this would cause considerable strain. There is a cost-of-living crisis and to double costs in this way would show little regard for my mum who is 97 this year! A rise of 100% is obscene at this time and in one go!

Everyone's council tax has been increased on more than one occasion to assist with social care costs. What have you done with that money?

This is a cost cutting exercise by the council. It does not say how much the council will save in a year. You say 12.3% will have to start contributing but do not say how much! 53.3% increase contribution but on an average how much? 10.7% pay all cost but how much on average? Without the how much the statement is meaningless you tell us what you want to know. But not the full picture.

The changes need to be cautiously reviewed and amended I know the proposed charges would detrimentally affect my care, the possibility of me staying in my home, and not being forced to sell my home to pay for my care. I have little savings but some of my disposable income currently pays for additional private care.

People that don't have saving should have the care people pay for caring should have same care.

There isn't enough information for parents whom young adults have a disability. It's so hard to get them support when they have left school, most young adults with a disability like everything to stay the same.

Is this proposal just another way to keep disabled people in poverty.

Money grabbing Derbyshire County council

Care + charges not to change

I have no objection to the principle that disabled people should pay for disabled care services, however the level of charge being proposed is absolutely shocking and removes any incentive for disabled people to work and contribute to society and be prudent with their resources.

Your duty of care is to your constituents.

What you are saying is basically people who can afford it should be forced to pay for private health care which is unfair unless they don't pay nil instead social care should be part of the NHS and paid for by a lifetime contribution of national insurance.

I had to spend a lot of money to furnish my home, so I do not have a lot of money to last me in my pension years.

People who have spent their money and not saved should not be entitled to free cover over responsible people who have worked hard and tried to put a little money aside to provide for emergencies in the home, paying their bills and replacing broken appliances etc.

Voters will see it as another tax on the disabled. I have one carer per day my wife is my primary carer, thus saving the taxpayer money, whilst still working four days a week. About to pay for a bathroom conversion and saving up for a mobility scooter.

I believe that anyone with savings up to £50000 should be left alone. We pay enough at the moment with the high rise in the cost of living.

Those who attend day care have to provide their own food- incontinence pads, etc. The idea of slashing their days and charging them the same or more, is to me awful. Adult social care is already paid through council tax and the vulnerable shouldn't be paying any more.

You need to make assessments on the disability not the savings/ income.

My son only has a few hours support a week yet pays as much for this as someone who has 24-hour care. How is this fair?

We have paid once, and you returned it is now again you want money.

To save money, why don't you cap the salary of directors, assistant directors etc. Anyone over grade 18 should have their pay frozen. Ridiculous amounts of money paid to people on grades 18-21 no-one should earn more than £80,000. Shame on them!

Your past history of consultations shows that you totally disregard what people say. You have already made your decision - just as you had at the consultation for day centre closures. This is a waste of public money + time

Current co-funding charges are fair to vulnerable disabled adults in Derbyshire, and increases should not be considered in the current economic climate. Thanks.

Unfortunately, if people see a massive increase in their payment. I feel they will cancel all care and say they can manage. This will then lead to health deterioration, more hospital admittances etc.

With such a large increase, I would be tempted to cancel my carers. I think these proposals will lead others to think the same. See increase in poor health, mental health and increased hospital admissions.

Clear proposals and suitable guidance and tools to make application of the roles straightforward for all.

If people with severe and enduring mental health problems cannot afford the new co-funding fees, they may cancel their direct payments support. This could result in people becoming very ill, more work for crisis teams and hospital admissions, causing the NHS costs to rise, should people who pay no funding be made to pay some

All changes should make net capital the main point to look at.

You appear (on behalf of the state) to want to reduce my assets on the basis of fairness. It doesn't feel 'fair' to me. Is the real motive the mayoral system which does appear to breed to? Why are you making me worse off? My family will not support me financially.

I feel the most vulnerable are being targeted and those who have worked hard + already paid tax targeted. I know changes need to be made but processes need to be for those with a lot of capital pay the same those who have very little why is it not tiered.

I believe the lowest proposed % of 80% is far too high, particularly when the national figure is notably lower than the current amount. The current amount is not enough to live on really despite what your calculations may say, so this will leave some people far worse off. You should take more from the richer and less from the poorer.

I think the current figure should be retained rather than adopting the national figure, and there should be a % option which is far lower 80% probably 30% there should also be a way to review the care which is being provided and so if we are getting value for our money.

There has been no information provided regarding the cost of care. Most carers receive minimum wage, but the care company charge higher hourly rates. Will there be a standard hourly care rate, if not will there be assistance relocating care to lower charging companies.

I fully appreciate that costs have to cut but this seems like a cheap shot. Maybe it would be a better idea to properly assess all claimants and stop false claims. Far too many people play the system. My daughter cannot because she does not have the mental capacity.

I realise that care has to be paid for and most clients would not mind paying more for their care as long as it's reasonable, leaving them enough money to have a decent life, not watching every penny they have to spend.

These surveys are a waste of time. People say what they want and need officials do the opposite what they want. And it all costs a lot of wasted money.

I filled the calculator in, and the additional cost were rejected/ignored. Also, it's not? How is calculation made i.e.? As means.

All final decisions should be based on each individual circumstances taking on board costs which may be incurred to help improve quality of life or mental wellbeing.

If a person moves from council paid cover to becoming self-funding for a period until their capital assets reduce to £23,500, will they lose access to their social worker b) will they have to start whole assessment process again from scratch + c) will they have to re-negotiate a contract with their care agency? All the above should be avoided.

It is grossly unfair for someone who has worked all their lives and saved a little money to be charged more than someone who has not done either.

I wonder how many responses you will get to this lengthy and complicated questionnaire. I imagine that you will get very few responses and will therefore take it as read that everyone agrees with your proposals.

For older people and younger, these questions are very difficult to understand, and we are unable to really fully give people answers. They are frightening to people living on their own.

I have found the proposals and consultation complex and despite asking I have seen no form of the consultation that is accessible to people with learning disabilities. Without this your consultation is invalid as it includes a large proportion of those currently receiving support!

I hope that claiming what I'm entitled to won't be as mind-boggling as understanding this questionnaire.

Proposals seem drastic! Implemented in one step, some people's contributions could leap up!

Put yourself in real people's shoes and stop making everything in life purely financial. If you really care for people who need it most in society and that becomes your focus the money becomes easier because you make the right decision for all in society.

The whole process is putting additional strain + worry onto the families of those who receive care. It is these family members who bear the brunt of attending meetings, responding to questions, understanding the rules, + worrying about the impact for their loved ones, when they are already stretched to breaking point supporting their loved ones as well as looking after the rest of their family.

The physical and mental health should be the number one priority for the council not penny- pinching.

Our responses reflect the fact that we disagree with the proposed changes but appreciate the financial pressures the council is under and that changes have to be made.

To conclude there should be a graduation of capital assets when being care for in your home. Not parity of £23500. The carer is clearly saving the government, the taxpayer, etc as to being in care home or nursing home.

As I am unable to write that much, I would like these comments to be taken into consideration for all sections. Under the current proposals, if the council use our savings and my disposable income (pension, ESA and pip), for my care, my husband will be better to give up work. Consequently, instead of paying tax and in, he will need to claim attendance allowance and look after me. We are also likely to need respite care to allow him a break.

Any changes to the financial contribution should not include a reduction of disposable income about current levels but should base solely on a service user's capital.

Need to talk!!!!!!

The potential on cost has not been thought out here for the sake a short-term money saving. So much for fixing the social care system.

In principle currently based more on disposable income seems to be fair but making such a drastic change to the upper capital limit seems a very unfair way to penalise those who have worked and saved their whole lives.

My care budget has been cut and cut again. This consultation is just a way to implement savings, to the council, at the expense of disabled people. The system should be left as it is.

Don't do it

I feel that everyone is struggling financially at the moment. The government have been giving cost of living payments to help people most in need. These are the type of people who may end up worse off through these proposals.

The costs charged should only cover the care provided. My current carers spend some of the time waiting for transport and not providing care. I do not want to be charged for this!

How much of these costs are being pursued to pay for immigration costs.

If people with severe and enduring mental health problems cannot afford the new co-funding fees, they may cancel their direct payments support. This

could result in people becoming very ill, more work for cams crisis teams and hospital admissions, causing the NHS costs to rise, should people who pay no funding be made to pay some.

Where does your adult respite care in Derbyshire exist?

This questionnaire was difficult and vague. I feel that I was being asked to answer questions without having adequate information provided- in spite of attending one of the meetings, and with the support of one of my pa's

I'm sorry but this is too much information to understand. Could you not just have told me how much each option would cost me. One simple letter.

No consideration given to people who pay rent or have to support other family members such as disabled children. No consideration given to services that have to be bought in because DCC do not provide. Reluctance by DCC to consider reasonable expenses such as dietary requirements, costs of medication, maintenance of property, costs of transport to help with purchasing food etc or funding lifelines like telephone lines.

The questions seem to suggest that the proposals you have made are a 'Done Deal'. Having had elderly relatives in the situation were applying for assistance a few years ago, the figure of £50,000 was never mentioned but the figure of £23,250 was. This makes me believe that either we were not given the full facts or that the £50,000 limit is a more recent limit that is already being reduced.

These proposals will mean people who desperately need care will give it up as they will not be able to afford to pay for the care at the rates proposed

People who require care for whatever reason should not be penalised, they did not choose to become disabled, frail or vulnerable. Stop wasting money in other areas and plough the money back into social care.

Disabled people need all the help they can get and at times they only have 1 person caring for them and need additional support.

Just the obvious worry that the consultation process is only carried out so that the council can say they have consulted and that whatever the results of consultation the changes will be carried out anyway. The results of these consultations should therefore be communicated to those who were consulted.

I think you are pushing households into not caring at home by this change. I work full time & care for husband with early onset dementia, yet you now want to reduce the household income by taking money off him. The minimum income is not enough to pay his half of household bills & food. I am already at breaking point caring for him at home & why should I continue to make myself

ill caring for him if you are also going to make me financially worse off since I would have to cover his living costs.

Retention of a fixed cap is essential although it could be less generous than current, say £65.

Overall, poorly thought through and guaranteed to put more pressure on councils long term - It is very clear from the proposals that the value of people owning their own home and so not burdening the welfare system has been completely missed as has the role played by relatives in reducing the care required so punishing them for needing a respite guaranteed to ensure they will think twice before taking it on. Your school report ranks this proposal as "failed"

Agrees that this consultation should take place as peoples financial situation changes over time and they may have more or less to do fund.

Agrees these needs looking at as things get left for years before something gets looked at and people's circumstances change.

I think many will decide they cannot afford such an increase, e.g., a person without capital was previously paying £51.07 if this was to increase to £252.94 p/w as case study, ref L in the cabinet report suggests, they would struggle on at home until they were admitted to full-time care or hospital. Also, I fear that if many people became self-funders, due to them having income over the cost of their care package, this would drive the price up charged by care agencies!

Although these proposals are challenging for some, I think changing the charging policy will help adult social care be more sustainable since the government has decided not to fund social care at the required level. It also means those with the greatest wealth can and should contribute more

Think the proposal on the whole is a good idea and should be reviewed as it's an unfair system to some people. Older carers should be given a lot more consideration.

You are asking for more money from vulnerable people, at a time when you have just reduced day services and closed day centres for disabled people. disgusting

All these proposals are penalising our elderly and increasing costs at the time of high cost of living increases. You should be ashamed of yourselves.

I am disappointed with this consultation the online calculator provided to enable families to assess the proposed impact of the changes required too much detailed information. I think you could have provided a much simpler tool that would have enabled families to assess the potential impact without

performing the full financial assessment. I had more to say - you should have provided a bigger text box for this field.

80% of excess income over MIG and DRE should be the maximum charged and there needs to be transitional protection for those most affected.

When people are in need from different countries, we dig deep but when it comes to looking after your own disabled and sick you try to get as much out of them as you can and squeeze every last drop from them.

Local government should ignore Conservative policy. Demand higher amounts money. Agree a fare system across board. This government gives you £1. Takes back 35p totally wrong.

With respect to co-funding, options 1) 2) and 3) all include a proposal to introduce the NCL of £23250, even though this is due to increase to £100000 in 2025. This is a short-term measure that would cause much distress for those affected. It is not just targeting the well-off at that level. Why are there no other options?! Assuming DCC needs to raise more money through self-funding increasing (but not removing) the maximum contribution cap from the current £51/week seems to be a fairer option.

This is not a proper consultation, in that the local people are effectively barred from suggesting a more moderate change to Derbyshire charging scheme. It reflects badly on DCC that it does not value the benefits of Derbyshire's current criteria for co-funding care.

Online application only allows an amount character, please can this be increased? I could not write everything in the comments field for question 5. Derbyshire County Council Facebook / other types of social media have not advertised the questionnaire, please can this be requested to be advertised asap? Also, people who are deaf how are they accessing the online and public meetings? Are BSL interpreters being provided? How has this been communicated to the deaf community?

I understand you have to balance the books, being an accountant, but adult social care is not a want a need, why should these adults be penalised whilst councillors get huge increase in their allowances - why don't they take a cut like the rest of us? I have had to give up work and all my income to look after my daughter. When every other option of all your services have been cut back beyond the bone, then let's look at taking money of those who can't answer for themselves.

I have read all the available material regarding the proposals, and I can't see anywhere a proposed implementation date. Will you publish this prominently, as soon as possible please?

I think that the whole proposition is DANGEROUS. Given the current financial position of the country I think this is likely to send numerous people over the edge. I never asked to be disabled and have no choice but to access care

I care for my 93-year-old mother and have done the financial calculator. I AM SHOCKED BY THE RESULTS. Based on the 100% option, you will basically take every spare penny of her monthly income. By the time she has paid her costs (electric, gas etc), she will ONLY HAVE £22 PER MONTH LEFT OVER - how is she even supposed to feed herself with such a small amount of cash? I STRONGLY DISAGREE WITH THIS PROPOSAL. It is grossly unfair, and I aren't telling my mother as it will scare her to death.

I find it disgusting that the conservatives, yet again, choose to punish the weak and vulnerable in our society because the majority of these people have no representation or voice. It says everything about the truly awful mess you have made of this country. Corporations and the rich should be taxed more to help the weakest people. Your priorities do not align with the majority of this country.

This is a dreadful change, too much too soon. Many elderly people will be unable to pay care costs and heat their homes adequately. The Council should be ashamed to even suggest such a huge increase in costs (6-fold for this household) during a cost-of-living crisis.

The jump from current fees of £51 per week to these levels are unmanageable for elderly people on pensions and are likely to frighten many of them from turning on their heating, eating properly or accessing the care they need to keep them safe. The council should be ashamed that they are even considering such proposals.

You don't support our needs anyway but those who tell us what they think right for us.

Something needs to change at some point so agree a review needs to be done on charges.

Previously it was 75% of STANDARD attendance allowance or personal independence payment even if person received higher or enhanced level. Is it proposed that it would be 100/90/80% of standard or of higher/enhanced (if person receives latter)? It would be cruel to make it the percentage of the higher/enhanced level as people who have been assessed with these higher needs, generally do not have a high standard of living or a lot of free cash.

I find it disgraceful that Derbyshire County council are stealing money from disabled people who have few or nil assets. The county council are planning to take more money from disabled people who find living difficult and have

very little money and if dcc have their way these vulnerable people will have their co-funding increased by around 100%.

The council are intending to take money from the most vulnerable people in our society

It's very sad that people who have worked really hard throughout their lives, producing lots of tax/ national insurance money for the country are robbed in this way if they become infirm. It sends a message to all that it's not worth working hard throughout your lifetime to earn money through hard work because it will just be taken off you if you become infirm. May as well not work/ try to save for good things for the family as all will go anyway.

I have been on the receiving end of care costs as both my sister and her husband developed dementia. They thought they were secure financially, but it doesn't take long when paying care home fees to reach rock bottom. They had a disabled son who I need to care for who was classed as an independent adult, although living at home. All I can see is that you are passing the buck onto people at their most vulnerable.

Why are the leaders of the county council earning what they are, considering their is supposed to be a cost-of-living crisis?

I agree that people need to pay more if they can, but I think the 'big jump' in one go will cause a lot of worry to many elderly people. My Mum is already worrying about how much more she will have to pay, and nothing has been decided yet. Maybe the inevitable increase could be phased in over a couple of years?

This process is causing huge additional pressure on the families of those requiring support.

Consider the length of stay should be taken into consideration, i.e., the longer the stay the less the charge becomes.

The care of somebody with a disability can be extremely difficult (as well as rewarding). Please don't change the systems so that another set of assessments and paperwork is introduced. This causes so much strain and fear for very vulnerable people and their families.

Worry about the impact these proposals will have been already having an impact on my health and wellbeing.

This Consultation discriminates against people who, because of their needs, are unable to understand its implications. There has been no easily accessible support provided for them to contribute. People with Learning Disabilities will not understand these proposals and what they mean for them. As an

Appointee for my person, I have not been consulted/contacted about this. I only found out by chance; this is NOT acceptable.

Why not cut schemes like diversity training and any investment in political projects like Rainbow Week, etc

I find it more acceptable to review people's savings than their disability benefits, which regardless of any national reviews are low. If you have an autistic young person with learning difficulties who is physically quite fit but cannot work, or even find voluntary work due to unwarranted health and safety concerns, they are left without purpose and meaning in their lives and trying to fund stimulating daily activities becomes expensive. You should not be adding to age/disability poverty.

As always it feels as if there are few if any incentives for people to save for the future. I do not disagree with people paying for care in later life but do object to those who have worked hard and saved or been frugal being penalised for it. National Insurance needs to be made fit for purpose, so people start paying for minimum services much earlier in life or care needs to be assessed on state pension.

Proposals are absolutely shocking coming from a council that's cut services to the bone while increasing transformation project management and since management structure, disregarding basic care staff pay to the detriment of the service. Poor management, poor decision-making, complete waste of money. The service should be returned to the national health service.

I think this is pretty complicated and whilst I know you have to consult, consulting with no background (why this decision has been taken presumably cuts) and with complex language, makes your consultation of limited value.

I understand there needs to be some changes to the substance adult social care but some of the proposed plans are just too harsh and would leave people struggling in cost-of-living crisis we are in.

The council has got itself in a fix financially and is seeking to take money from the most vulnerable in order to address this. The disabled and their unpaid carers are seen as an easy target. Waste, unnecessary expenditure and low productivity within the council should be addressed instead. I think these proposals, particularly the 90 and 100% and the lowering of the £1/£500 level to £250, are immoral. I doubt councillors/those involved in this realise how much even £12 pw is too loose to many.

Why is this the only solution that you can come up with. We attended today's meeting explaining the questionnaire today in Buxton unfortunately the chap didn't have many answers to the questions. Derbyshire should DO BETTER. It

appears that that DCC has already made up its mind! Is this the only solution you can come up with which is to follow every other council.

I feel that everyone should have to pay some co funding, to make it fairer for everyone.

The proposals to increase the charges for social care ultimately reduces the ability for people needing care to fend for themselves by reducing their incomes. The current DCC policy for funding social care provides fair and sensibly costed provision. If this was Scotland social care provision would be fully funded.

I think that the current offering is excellent and have been pleasantly surprised. I think that some people may face a large increase in payments and hope that nobody has to stop their care packages because of this. A phased introduction would be helpful.

6,000 people are going to need financial assessments at least yearly. That is going to need resourcing and it will be expensive.

This is going to make 70% of people worse off. Safeguarding will need to be put in place. Families may decide to withdraw their social care support. You will need more safeguarding resources to protect these vulnerable people.

You aren't paying for disabled equipment anymore. People like me who have worked all our lives and own our own homes get treated more harshly than those on benefits that also get their rent paid for them. There are people that get benefits for their care component but don't have to pay towards their care. It is not fair; everyone should contribute towards their care. Hardly anyone in Derbyshire is paying towards their care as they are on benefits. You should do what Sheffield do and charge everyone. That is why Sheffield aren't in financial difficulty unlike Derbyshire.

You would take away so much of people's incomes. You would leave people with very little for emergencies like a new washing machine.

My son goes to a day centre, and they take them on a minibus to Peak Rail to do volunteer work. Not only is he working for free he is paying to be there as he is paying Co-funding. He still has to pay his Co-funding charge even if there aren't enough staff members or if there is a problem with the bus.

This seems to be bashing people who have worked all their lives and built-up savings. These people are going to be so much worse off than those who have never worked.

You are going to be making 70% of people so much worse off.

This is discriminating against those that have done the right things and planned financially.

I will either have to borrow from the value of my home or reduce my husband's package of care.

The vulnerable people are being squeezed from all angles 100, 90 and 80% is just too high. Consider a lower amount to make it more manageable for people.

The three figures of 100, 90 and 80 % are a steep. This consultation is unfair. Consider a lower amount.

The idea nationally of trying to increase income tax to fund social care needs to be introduced.

We have got the same budget for years. The amount we get hasn't gone up in 10 years. The budget is actually being eroded as carers wages have increased but our allocated budgets haven't gone up.

There has been very little publicity re these proposals. People not currently receiving care services have not been informed.

These proposals are just targeting the vulnerable.

My social worker said sell your home and go into a care home.

You work all your life, then you get it pulled away from you to pay for your care.

Calling the financial calculator, the better off calculator is just wrong.

It would be better to have an option for guest log on for the finance calculator as people will be weary of entering their details.

It's not enough that oaps are taxed on just about everything.

Why should those who have worked all their lives have to pay more for exactly the same care as those who have exploited the system and have never contributed. You cannot rob X to pay for X

Respite care is an essential need for the family. If the person refused to pay, then the relative would get no respite. Many relatives are at breaking point already.

I do not understand your questions see q 5.

Its needed

Standard charges should remain. Respite is for carers who should not be penalised if the unwell person has some savings.

This is something they cannot afford.

Respite is an essential for carers. Many relatives are caring for their loved ones free of charge saving the council thousands of pounds. Without respite many would be unable to take a much-needed break.

All benefits should be exempt.

No comments

More stress and worry for carers to make the funds stretch to cover the needs of those you care for.

Everyone should be treated equally for respite care despite their financial circumstances.

Respite is a need, not a luxury, not a want. I don't need or want to go to turkey. I do need respite to provide me and my carer a break it's a prescription item and should be viewed as such.

It's a nightmare already! 1st time starting to use it and not very good costing more than holiday not a respite!!!

Yet again, it is unfair to charge people differently for the same care. You are forcing massive issues on a very small production of the community who are extremely vulnerable.

People shouldn't have to pay for respite care.

Very unfair to people who have worked a saved when someone who has not will be charged.

Respite is not only assisting the disabled but also the carers who spend 50/60 hours a week caring-unpaid-unwanted and uncared about.

I feel respite should not be based on capital disposable income as respite help carers have respite for the care they provide.

It should be given free of charge people have worked in general from leaving school to retiring, they have paid their taxes and in contributions it should be taken from this.

Respite care should stay as a standard charge.

Trying to get respite is nearly impossible. Most council homes are closed down and private homes are just charging what they like. £1,000 to £1,400 in most cases. Respite is the thing you need most when caring for someone.

I think it is disgraceful that people are being so penalised for having led a responsible life and made provision for their retirement and this should not be

means tested- people have paid their taxes through their working life and that should fund their care.

A good idea in theory but it needs to be applied wisely. A full understanding of the cost of living and the importance of having a decent amount of disposable income will need to be taken into account by those in charge.

Ok if the policy and thresholds don't change

Leave well alone you are walking into a minefield.

Leave it as it is. Presently people have made plans and decisions based upon current contracts and conditions. Any charges should only apply to new applicants. Existing contracts should stay as they are.

Actually, getting respite care alone is difficult but I think it should be assessed in line with what the council charge. I.e., as the system is now, co-funded/contribute etc.

Yes, I do think people should have respite care, and if they have a large amount of saving, they should pay.

I tried to get my daughter into respite one or two days a week but none in my area, it's very hard for parents with young adults with a disability. I'm not putting my daughter into full-time residential

People who need respite, would not get the break they need, these proposals is going to make it harder when they have to stay home because respite is costing more than they can afford, which in turn they will need more help use more heating and the carer will have to do more, a lot of carers are not paid.

Respite care is there for people who actually need a break this should be free on any means tested benefits and have no savings.

I thought you did that already

No cost should come before any care and wellbeing for disability of any elderly person

If you live in your own house you are penalised for it, if you are a council Tennent up are privileged to get all core packages.

My husband been in respite a few times and I pay £159 a week.

Again, Derbyshire County council taking money off council tax paying public.

Very hard to understand as there is no starting or end figures

We already pay for this in your increased council tax demands.

These proposals for respite care are shocking and completely disregard the serious needs that disabled people and their families who need respite care to maintain life in the community.

Respite is what carers need not the worry of more costs!!

Respite should be free for certain clients, depending on circumstances clients who have disposable income should continue to pay.

We do not mind paying for residential care if it was reasonably minded if the charges were the same standard rate for everyone and matched how much local/ authorities pay. Currently the difference is 1000, s of pounds a month how is this morally right or even legal.

I have not had respite or holidays in 6 yrs. I would love to know how to do that. My husband died 5 years ago it was 1-2yrs before that we had a holiday.

Prefer to keep criteria as now with no changes

A wife being a primary care or even a family member well need a break at some point, or they will reach breaking point. Respite is not only for the disabled person, but also for the mental health of the primary care giver. Your proposals stink.

I think only respite you should not have to pay

Why work hard and save when it's all free for others?

A agree with ability to pay option based on income and assets.

B do not agree with move away from standard rates based on age.

Taking hard earned savings from the vulnerable is a low move! They'd rather have their health back, then to rely on carers.

Respite care is essential for people with severe disabilities. The impact it has on the full-time carer and loved one is horrendous.

Respite care is only provided as a last resort and only when the partner cannot cope - thereby, resulting in the caregiver becoming exhausted and unable to think clearly.

I'm disabled now not through choice. To, yes? My pension.

If you have a lot of money, then you should contribute more.

You are not taking into consideration the person is going into respite. The current policy is ageist.

Clear guidance. Easy to change when circumstances change.

This would be fairer than a standard charge.

Judged fairly

This needs to be clear, easy to apply and sufficiently flexible to be adjusted in line with any changes in income with immediate effect to prevent hardship.

Should people who pay no co-funding, be made to pay some as many will be on higher benefits? Do we all get to see the results of this questionnaire?

The most vulnerable with disability in society should be penalised

I do not use respite care.

If the service recipient refuses to pay because costs are too high. This will leave the Carer in a very difficult position if they feel they really need a break. Respite care usually benefits the carer, not the person paying. So, I feel you should reconsider this proposal.

You still need a framework with maximum-minimum amount so people would know what respite care would possibly last.

This sounds more complicated for me. I liked things to remain the same.

Always thought the system was fair and square. It has worked for us for a number of years.

We have the lowest disposable income as we pay more for most services due to our disability

I believe the standard weekly amount is a fair approach, but also believe this should be an up to or capped amount at an amount or % over the minimum income guarantee. Being in residential or respite care does not mean that a person has no other expenses. The weekly amount should not take a person under the mig.

There should still be a cap on the amount which can be charged. This should be an amount over the mig. There should also be consideration taken as to how long they are likely to be in residential for.

Question is not understandable

The most vulnerable with disability in society should be penalised

I do not use respite care.

Respite not needed.

Respite care is an essential break for carers as well as the person being cared for. I think changing the charging policy is going to create a barrier to the respite considerations on a financial basis.

Carers are under constant pressure and need respite. An increase in charges will lead to pressure to minimise respite care to save money. This will be to the detriment of both the carer and of the disabled person.

My family member has been placed in respite care when he has been discharged from hospital but there has not been sufficient home care available. It is unfair that someone who is just over the capital limit would be responsible for full costs in a care home because care cannot be set up at home.

This is effectively positive discrimination. Everyone should have access to the care they need. Maybe look to saving money in other areas e.g., unnecessary bureaucracy.

Think there has to be an upper + lower limit- even on individual circumstances etc so people have an idea of what respite care could cost.

People who are ill and in respite care should be looked after under the health service as was proposed when the health service was formed in 1947 by a government that cared for the sick and elderly.

It seems fair to charge based on individual financial circumstances.

I think this is a fairer way of charging for respite care required on an ad-hoc basis.

If it becomes more of a drain on people's capital (in addition to care costs) will people (carers) resist purchasing a respite service even though it may put their own health at risk.

A standard reasonable charge should be in place.

Respite care should not be charged at a higher rate.

Do not understand!

I think personally the homes charge too much

Do make it harder for carers to have a break!

Fund things properly and care for the most challenged people in society rather than hurting them more!

Respite care may become unaffordable under these proposals, putting extra strain on families. People in respite care still have significant costs of running their homes.

Should be one charge regardless of capital or disposable income. Should be a reasonable charge the same for all. Keep as is.

Everyone should be treated equally.

My wife has not decided to utilise respite care but to covid 19 fears and my guilt that I would not wish to stress her. Thus, as her carer I have not had a holiday for many years. I understand currently we are allowed 3 weeks per year respite per year respite care is of course crucial to the health or the caring partners, but I manage.

It is unfair to penalise family who wish to access support to ensure care can continue to be provided in the house with family support.

Keep the standard charge but use an assessment of an individual's capital only to determine their contribution.

Respite care is very thin on the ground anyway.

People who are not in full time residential care but are cared for by family etc save the council money. These carers- be they need full time or part time need the respite as much as the individuals having the care. Again, this will push people into full time care as people struggle to cope with full time (no time off) caring affecting their mental health.

Roll on the next election!

This seems fair, as long as it doesn't prohibit people who need respite care from accessing it.

Some people can afford to pay a bit more some can't.

Respite is similar to hospital so should be costed at the same level as the NHS, i.e., free.

This should be universal means testing hits working class people who have saved.

I don't think people should have to pay more if they have assets. Everyone should be treated equally.

Everyone shall be equal.

Question is not understandable

Depends on length of stay.

Respite care should not be charged.

I feel unqualified to answer this.

Don't understand - never dealt with respite care.

I think any person's date of birth or gender can differ so widely that any case should vary accordingly. Each case should be treated on individual basis and treated accordingly.

Terrible idea

Having different charges for different incomes is not a fair way to do it. If there is a charge, then people should be aware it is a set charge.

Charges for respite should come out of their personal social care budget. It should not be another financial burden on the individual or their families (where applicable) who are already on the lowest incomes in the region.

Everyone (especially carers) needs respite regardless of their financial situation. I would hate to think that the cost of respite put off someone from using the service even if they are wealthy. I know wealthy elderly people who are already refuse help because they are not eligible for help towards the cost. They see their hard-saved money as an achievement and don't put themselves first to use it for care. How rich you are means nothing when you are struggling to care for somebody and need help

Respite care should be fully funded up to certain limits e.g., Up to 2 weeks to allow family/carers a break for a summer holiday, plus additional periods of x number of overnight stays and/or day care.

Respite is just that, short-term care giving a carer a break or rehab after hospital. Charging for it will put a strain on already burnt-out carers and families

Respite care benefits carers as well as the person needing it so any higher charges could be detrimental to the carer and the person involved resulting in carer stress and breakdown of informal care

Respite is an important part of keeping people who care well. Without regular respite, carers will end up having carer breakdown and not be able to cope so the person they care for will end up in full time care

I both agree and also disagree. If the respite care being requested is a one off then there should be a minimum charge based on the incremental costs of the person being in respite, e.g., Food, laundry etc. Fixed costs etc. Staff wages should be disregarded. Frequent users of respite case, e.g. More than 3 times in a 3-year period should pay the new proposed rate.

Another example of poor thought process, so the value of your house - which you cannot spend is taken into the calculation - what genius came up with that? Then you decide to punish those who are doing your job for you by charging them when they need a holiday from the unpaid work by putting their relative in respite care for a week or two? Jolly good so now people will say forget it you can have the problem all the time. You should be encouraging people by providing free respite care

Respite care should be limited to 2 weeks a year for children and adults, but this should be free. This is for families caring for a disabled person.

People should be charged on what they have in savings as some people may have more than others and should contribute more.

Agrees that is people have more money in savings they should contribute a larger amount to the respite care they receive.

If people have more money, they should be paying more and if they have less, they should be paying less.

I think respite could be included for people with capital, however it may stop people wanting to take respite when needed due to the increased cost, which as a consequence may result in more hospital discharge, increased pressure on informal care and the person may be reliant on more care in the long run.

It should be on the individual person

Respite care should be affordable as it's necessary for all families who receive it. Without respite, many family carers couldn't cope

The health and wellbeing of the carer should not be undermined by their ability to pay for respite care.

Seems much fairer way than charging a standard rate to everybody. Should depend on what money person has. No one should pay more than 65%. totally wrong touchable higher.

Should be charged on overall ability to pay/subsidies

Does not affect me

Respite care is often a necessity for some families at certain times. A standard charge would reduce the bureaucracy, paperwork and cost for all concerned.

I disagree that people who have been prudent with their finances should be penalised when paying for respite care. The current system is the most equitable and doesn't need to be changed.

This does not affect me personally at present, but I disagree completely with the proposition

Respite care is essential for the health and wellbeing of carers, who are already unpaid or underpaid, and whose health suffers as a result of caring responsibilities. 40% of carers die before the person they are caring for. It is inhumane to deprive carers of respite care on the grounds of cost. Most elderly people will refuse respite care if they have to pay so much for it, which fails to help carers at all.

40% of carers will die before the person they care for. This proposal makes it even more difficult for unpaid or underpaid carers to get any relief from caring duties. Workers all have statutory holiday entitlements, but carers who often care 24/7 get nothing, and this proposal will price them out of respite care. Another discriminatory measure against carers of disabled people.

This has been lapse for many years and many cases need to be looked into
Like everything else you do is criminal and must stop

Charges should be the same for all if they are getting the same care. It's unfair for some to pay more than others because they have earned more money at work during their working lives. They have worked long hours in the past at work which has helped the country in terms of tax etc They are then punished for working hard throughout their lives. Could looking at the amount they have given to the country throughout their working years be considered? Otherwise, there's no real incentive to work.

I would like to see an updated national policy as promised by the government who have been in power for 12 years rather than leave it to local councils.

Age and wisdom will overcome youth and skill.

Have no understanding of this but seems unfair for standard rate as will be too much for some people whilst others could afford to pay more.

All this means is that people will choose not to have respite putting more strain on already exhausted families.

Respite care may become unaffordable under these proposals, and it is the families of those that require support that will bear the brunt.

Respite care charging should be based on need.

Should be free for all

Respite care is already a difficult & emotive subject to raise with loved ones & the new charging proposals would just make it more challenging with the cost more likely to fall to relatives rather than the recipient.

Shocking, adult social care should be sussing out their top-heavy overpaid management structure and return the funds to Care Community

Your current policy appears ageist. Age isn't necessarily correlated with the cost. Equally if you base it on capital income (do you mean income or assets?) Then that's not accessible cash to pay for care. Rethink? Base it on disposable income minus eligible expenses? Otherwise, how can the person keep their household functioning?

I would prefer to pay when and if I ever needed it

People might never need it so why pay for something we might not ever use

Elderly carers caring for a spouse are less likely to seek the necessary respite breaks which they need, to help them continue their ability to care for their spouse, ultimately increasing the need for local authority provision.

Any increase in the cost of respite care will make it even less likely that my husband will use this as a break for him as a carer. The provision is already expensive and difficult to organise to suit.

If this is arranged in an emergency situation, then there may not be time to assess the costs before the person is admitted. Could there be an initial standard cost while the person, their family and/or care workers evaluate the patients' needs/ability to pay.

Equality Impact Analysis Record Form

Part 1. Introduction and context

Department			Adult Social Care & Health		
Lead Officer			Linda Elba-Porter		
EIA Team:			James Winson Graham Woodhouse Linda Elba-Porter		
Date analysis commenced	13/11/2023	Date completed	16/11/2023	Date approved	17/11/2023
Proposal being assessed:					
Recommendation to approve the implementation of the proposed revised Charging Policy for people receiving Adult Social Care support in the community and recommendations about the preferred course of action.					
Aims/objectives of the service?					
<p>A previous Equalities Impact Analysis was completed and included in the documentation provided to Cabinet on 15 June 2023. This provided Cabinet with information to assist with their decision making. The Equalities Impact Analysis considered two elements.</p> <p>1) engagement in the consultation 2) the impact of any proposed change</p> <p>Following the outcome of the public consultation the purpose of this Equalities Impact Analysis is to consider the impact of the recommended proposal.</p>					

The Council is committed to achieving good outcomes for residents who require Adult Social Care support; recognising that local residents want to remain living in their own homes, wherever possible, for longer. The Council is keen to offer support which promotes independence and offers local residents choice and control over this support.

The Council has a duty to undertake an assessment of any adult with an appearance of need for care and support, or any carer, with an appearance of need for support, regardless of their financial situation or whether the authority thinks the individual is eligible for support. This is to determine if they meet the eligibility criteria. If the person is deemed to have eligible needs which the Local Authority subsequently meets, the person would have a financial assessment undertaken.

Under the Care Act 2014, Local Authorities have discretion to choose whether to charge for Adult Social Care community support provided to meet eligible needs, except where it is required to arrange care and support free of charge (such as certain types of community equipment or if the care is to be provided free under other legislation for example section 117 of the Mental Health Act which entitles people to receive free aftercare following compulsory detention in hospital).

The regulations issued under the Care Act 2014 and LAC (DHSC) (2023)¹ set the current levels of capital (savings and assets) a person can have whilst qualifying for financial support from their local authority. The current upper capital limit is £23,250. People with capital between £14,250 and £23,250 are charged a tariff income of £1 for every £250.

The capital limits described above are mandatory for care home residents but for adults receiving Adult Social Care support in the community, local authorities have discretion to set a higher upper capital limit, a higher tariff income and a lower financial contribution rate.

The current charging policy for residents in Derbyshire who receive social care support in the community is as follows:

- People self-fund their care if they have savings above £50,000.

- For those who have savings of less than £50,000 and are in receipt of a benefit or allowance specifically made available for an assessed care/support need, such as Attendance Allowance (AA), Disability Living Allowance (DLA) or Personal Independence Payment (PIP), the maximum amount they contribute towards their care is £51.07 (75% of the benefit) per week or less.
- Tariff income is calculated at £1 for every £500 but people are not charged tariff income. It is applied solely to calculate if their income is of a high enough level to make a contribution towards their care costs.

The Council also operates a Disability Related Expenditure process.

The report to Cabinet on 15 June 2023 set out three options available to the Council for the consultation process with a view to potentially revising the current charging policy. During the consultation alternative suggested options could also be made. Since the consultation, officers have come to consider that Option 1 is not viable.

Option One

To change the charging policy for local residents in receipt of support in the community to:

- The national position concerning the capital limit of £23,250
- The national position concerning charging tariff income of £1.00 in every £250 for those with capital between £14,250 - £23,250
- To charge on 100% of disposable income with a £20 per week Disability Related Disregard (*subject to the below).

Option Two

To change the charging policy for local residents in receipt of support in the community to:

- The national position concerning the capital limit of £23,250
- The national position concerning charging tariff income of £1.00 in every £250 for those with capital between £14,250 - £23,250
- To charge on 90% of disposable income with a £20 per week Disability Related Disregard (*subject to the below).

Option Three

To change the charging policy for local residents in receipt of support in the community to:

- The national position concerning the capital limit of £23,250
- The national position concerning charging tariff income of £1.00 in every £250 for those with capital between £14,250 - £23,250
- To charge on 80% of disposable income with a £20 per week Disability Related Disregard (*subject to the below)

(*Under national guidance where a person feels the additional cost related to their disability (Disability Related Expenditure) is over and above that already allowed in the contribution determination, they are entitled to an individual assessment of their disability related expenditure. The purpose of this review is to establish whether a full or partial reduction in the contribution would be appropriate.)

Alongside the above proposals, to ensure a transparent and accessible approach to Disability Related Expenditure, the Council also as part of the consultation, consulted on revising the current Disability Related Expenditure process.

To ensure a standardised approach to charging for people who live in the community, it was also proposed to include the charging for short term residential respite within the proposed revised charging policy.

What outcomes would be achieved with the new or changing policy?

The demand for services continues to increase and is set to rise significantly over the coming years. This increase is largely due to our aging population and number of people with complex needs. The Council must ensure everyone pays an appropriate amount for the care and support they receive based on their ability to pay and to help ensure the future sustainability of care and support services provided by the Council. The Council must be in a position where it can continue to support the people who most need it.

The aim is to revise the Council's current Charging Policy to make it sustainable for the future. This would support the Council to consider options available to generate additional revenue which can help to off-set some of the costs associated with providing care whilst continuing to ensure people:

- Receive support that prevents their care needs from becoming more serious or delays the impact of their needs.
- Can get the information and advice they need to make good decisions about care and support.
- Have a range of provision of high quality, appropriate services to choose from

Any changes to the current charging policy would ensure charges are:

- Comprehensive and equitable
- Clear and transparent and understandable for people in receipt of adult social care support. For example, aligning the upper capital limits for community charging to the same as for residential.
- Applying the charging rules fairly and equitably

The implementation of the revised Charging Policy would ensure greater clarity and fairness for all people including those with protected characteristics. All people would be individually assessed to determine their contribution to their Adult Social Care support. Everyone would receive a standard £20 per week Disability Related Expenditure disregard and a robust transparent Disability Related Expenditure process would be in place for those who consider that their disability or long term health condition impacts their daily costs of living at a higher amount to request a higher disregard figure. People's contributions would be based on their individual ability to pay as defined by the national framework with an additional 10% income of their disposable income protected.

Please list any associated policies, services, or functions?

Derbyshire County Council Adult Care Co-Funding for Non-Residential Services (Current Charging Policy for people receiving Adult Social Care Support in the community)
 The Care and Support (Charging and Assessment of Resources) Regulations 2014
 Care Act 2014
 Care and Support Statutory Guidance 2014
 Disputed Financial Assessment Procedure
 Financial contribution Review Procedure

Please list the main people or groups that this policy/ service is designed to benefit and any other stakeholder involvement?

Over the last nine years, since the introduction of the Care Act, the Council has not made any fundamental changes to its community charging policy. Consequently, social care charges in Derbyshire are significantly lower than the limits allowed by the national charging guidelines and those applied by many other Local Authorities across the country. This has been the Council's position for many years, with the most recent amendments to non-residential charging being in 2014.

The Council currently charges for services at a lower rate than the real cost of delivery. It delivers care and support by provision of a subsidy for some who may have the financial means to pay the full cost or could afford to pay more. The

Care Act 2014 and the wider legislation provides a national framework for Local Authorities to charge, providing charges are reasonable and appropriate ensuring people retain a certain level of income to cover their living costs.

It is important the Council finds solutions to manage its limited resources in ways that are equitable to all current users of Adult Social Care support, as well as those who may require this type of support in the future. All the proposed options align the Council's community charging policy closer to the national guidance and those applied by other Local Authorities. The national framework is the driver for the impact on disabled people.

Demand and costs are rising, and the Council can no longer afford to fund the current charging policy within the existing or future budget available. This concern for the sustainability of funding arrangements was emphasised within the consultation. The Council's current financial position announced on the 13 September 2023 brought affordability for Adult Social Care into even sharper focus.

To ensure the Council can continue to fulfil its statutory responsibilities, a decision is required to protect Adult Social Care provision for people who most need support from the Council.

By focusing on sustainability, the Council can support initiatives to provide adults with eligible needs support that maximises independence and promote good outcomes. These initiatives can support people to regain their independence, access local community activities and reduce and prevent the need for long term adult social care support. Many of these offers of initial support for example reablement (a short term offer for older and / or people with a disability or long term health condition to gain back daily living skills following a period in hospital or following a crisis in the community) , equipment (for example hand rails, community alarms), Community Connector Service (a short term offer for people with a learning disability and / or who are autistic to connect them to community activities, volunteering or paid employment) and Mental Health Enablement (a short term offer for people recovering from mental ill health) are free of charges.

Public Sector Equality Duty

The Equality Impact Analysis is prepared to assist the Council's decision makers in performing the Council's public sector equality duty imposed on public authorities by the Equality Act 2010. The duty is one requiring the Council, in the exercise of its functions, to have due regard to the need to:

- eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under the act
- advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it; and
- foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

The relevant protected characteristics that are covered by the public sector equality duty are age; disability; gender reassignment; pregnancy and maternity; race; religion or belief; sex; and sexual orientation. However, the Equality Impact Analysis has also considered the impact of the proposals more broadly, including in terms of the protected characteristics of marriage and civil partnership.

Would the policy/service and any changes impact on any other organisations such as community and voluntary sector groups?

Non-residential service users of social care services.

Voluntary Organisations supporting carers and supporting people who needed added support and care.

Providers of care at home services.

Respite Care Providers.

Benefits and welfare sector organisations.

Unpaid and paid carers.

Staff from partner health and care provider.

Staff within Derbyshire County Council.

Part 2. Supporting evidence

Please list and/ or link to below any recent and relevant consultation and engagement that can be used to demonstrate clear understanding of those with a legitimate interest in the policy/ service and the relevant findings:

This Equalities Impact Analysis is intended to support elected members understanding of local circumstances and facilitate decision making in respect of the community potentially affected by any change to the adult social care charging policy, generally, those who may require chargeable support in the foreseeable future and specifically those in receipt of chargeable support during the consultation period. Impact is considered in the broadest sense, not solely in connection with protected characteristics under the Equality Act 2010. Information focusing on protected characteristics can be found in this document.

The formal consultation on the future of the charging policy ran from the 3 July 2023 to 4 October 2023. The consultation aimed to reach all potentially impacted people or their financial representative and/or other interested parties to inform them of the proposed changes to the policy, as well as wider members of the public. Officers enabled as many people as possible to take part, by offering a range of ways in which people could share their views:

- Media releases were issued during the consultation and news releases were published on the Derbyshire County Council website. Articles were included in the council's e-newsletters and information was posted regularly on the council's corporate facebook and twitter pages. Posters encouraging people to take part were

sent to be displayed at all the county council's libraries as well as GP practices, district and borough council offices.

- All current residents receiving Adult Social Care support in the community and their financial representatives (formal and informal) received an initial letter detailing the proposed changes to the charging for the service
- Within this initial letter there was a printed version of the questionnaire, with a stamped address envelope and explanatory information to help the recipient understand the proposals and how they may impact on them.
- There was also an invite to the planned meetings 5 online (held at different times of the day) and 6 face to face held across Derbyshire.
- The questionnaire was available upon request in different formats, such as other languages or larger print.
- A specific Derbyshire Consultation webpage was established, detailing the proposals and to enable completion of the online questionnaire.
- People were given opportunity to write into the Council via a letter or dedicated email address.
- Additional colleague resources were deployed in the Stakeholder Engagement team to ensure telephone interviews could be offered for those people requiring support to complete the questionnaire.
- An online calculator was developed so that respondents had the opportunity to input their personal financial circumstances to enable them to understand how each proposal might impact on them.
- This online financial calculator offer was enhanced allowing people to have a phone call from a finance specialist to assist with completing.

- A further letter was sent during the consultation to remind people of the closing date and inviting them to a further 7 meetings (both online and face to face)
- A British Sign Language (BSL) video was uploaded onto the Derbyshire County Council website describing to the deaf community how to get involved with the consultation.

During the consultation there were regular review intervals set up to monitor engagement. This identified actions to increase engagement including the Council sending a further reminder letter to all those people who received the letter originally; arranged further online and face to face consultation meetings and created a poster to be placed in GP practices. This had a positive impact by increasing the number of enquiries received.

In total 2375 people responded to the consultation. There are approximately 6535 people who are in receipt of long term Adult Social Care support in the community.

The main themes are highlighted below:

- **Negative Impact on Personal Finances:** respondents commented on the negative impact the proposals would have on their personal finances not only in terms of their weekly incomes and the current cost of living but also being a disincentive for people to save. Many respondents considered the percentages too high.
- **Disagree with the proposals:** most respondents disagreed with the proposals. A number of respondents stated the £50,000 capital limit should remain in place and considered the percentages to charge on weekly income too high. Respondents considered the current charging policy should remain and people in receipt of Attendance Allowance or Personal Independence Payments should not pay more towards their social care support.
- **Alternative Suggestions:** respondents, although recognising the budget pressures, suggested alternative options including a phasing in of approach and a reduction of the percentages. Some respondents

suggested the Derbyshire Minimum Income Guarantee should remain in place rather than the introduction of the National Minimum Guarantee.

- **Complexity of Consultation:** respondents commented on the complexity of the consultation. This is acknowledged as charging for Adult Social Care is complex and terms used within the national guidelines are not easy to interpret. Respondents attending the online or face to face meetings feedback was that these were useful and due to this a further 7 sessions were planned. Additional colleague resources were made available to the Stakeholder Engagement Team and the route of a phone call proved popular.
- **Agree with proposals:** some respondents agreed with the proposals. Whilst many responses to the consultation were not in favour of any changes to the charging policy, a higher number of respondents 21% agreed with the proposal to charge on 80% of disposable income Option 3. With 5.9% on 100% Option 1 and 3.3% on 90% Option 2.
- **Impact on People and Carers:** some respondents raised the negative impact that these proposals would have for people with a disability or those living with a long-term health condition. They stated that this group may be influenced to cancel their care if these proposals went ahead.

Detailed information about the consultation and feedback received is outlined in Appendix 4 and must be read alongside this report.

Following the consultation, a further modelling exercise has been completed on an additional 300 people in receipt of adult social care support to help understand the potential impact on people's contributions. The table below details this:

Effect	No of People	% Of People
Remain at Nil Cost	48	16.0%
From Nil to paying a contribution	17	5.7%
Increase in Charge	188	62.7%
Decrease in Charge	4	1.3%
Become Full Cost Payers	43	14.3%
Total	300	100.0%

If there is insufficient consultation or engagement information, please explain what action is being taken to obtain this information and when this consultation/ engagement will be completed and available:

Not applicable

Please list or link to any relevant research, data or intelligence, or any other information that is available and will be used to help complete the analysis?

The following lists sources of information which have been utilized in considering the equality impact of the proposals whilst also considering wider national context and background:

Demographic, financial and care package information held by the Council obtained from or electronic recording system

- Derbyshire County Council's Adult Social Care Case Management System – MOSAIC (for monitoring information about people using services).
- Derbyshire County Council's Derbyshire Observatory (for general data relating to demographics includes data from the 2021 Census).
- Benchmarking comparisons with the charging policies of other Councils.
- Financial modelling of the impact of the increase charges.
- Current and historic experience of the application of the Council's Adult Social Care charging policy and impacts on individuals.
- Current and historic experience consultation on the Adult Social care charging policy with individuals and the wider community.

Please list or link below to any relevant service user/ customer or employee monitoring data and what it shows in relation to any Protected Characteristic (Age, Disability, Gender reassignment, Marriage and civil partnership, Pregnancy and maternity, Race and ethnicity, Religion and belief including non-belief, Sex or gender, Sexual orientation)

This proposal aims to consider access of all sections of society to influence this specific Council policy. It needs to take account of the widest possible equality information, for example census data.

(Information taken from census data 2021, unless stated otherwise) [Derbyshire Observatory – 2021 Census Results – First release](#)

The last census data showed the Derbyshire population was 796,600, with a growth rate of 3.2%, much lower than the growth rate for England of 6.6%. All of the Derbyshire districts except Chesterfield have seen an increase in its

population. Out of the total population there is a slightly higher percentage of women (50.9%) compared to men (49.1%). There has been an increase in people aged 65+ at 22.8% since 2011, and they now represent 22.1% of the overall Derbyshire population which is well above the England average of 18.4%. The Council's electronic case management system (Mosaic) used by Adult Social Care for recording and associated finance services reports the number of people who have been financially assessed and deemed eligible for financial support for care in the community. This number changes daily but currently there are approximately 6535 who are in this category. Out of this age range 65+ has the highest proportion of people in receipt of adult social care support at 55.99% (with 33.52% of this being age 80 and above). The category age 18-30 make up the smallest number of people and take account for 10.24%. The age range 30-50 accounts for 16.38%; with 50- 65 at 17.39%. There are more females in receipt of services at 57.18%.

The English Indices of Deprivation 2019 (ID 2019) is the official measure of deprivation for small areas and provides a consistent measure of deprivation across England. Each area is given a deprivation score and a deprivation rank, providing an indication of relative deprivation. Out of the 151 Upper Tier Local Authorities in England, data from 2019, ranks Derbyshire as 103 (1 being the most deprived), which highlights a slight reduction overall in Derbyshire of deprivation compared to 2015. Within Derbyshire there are 491 Lower-layer Super Output areas and of these 86 areas (17%) fall within at least the 20% most deprived nationally. There are seven domains to measure deprivation. Out of this 20% of most deprived areas the key domains relevant to this Equalities Impact Assessment are `Health & Disability` which the second highest domain in Derbyshire at 22% with `Income` being the fourth highest with 15%. In Derbyshire, Bolsover is the most deprived Derbyshire district whilst Derbyshire Dales is the least deprived. Within the county 12% of older people are identified to live in low income households.

[IMD 2019 Infographic.xlsx \(derbyshire.gov.uk\)](#)

[IMD 2019 Infographic.xlsx \(derbyshire.gov.uk\)](#)

[Headline Report Indices of Deprivation 2019 \(derbyshire.gov.uk\)](#)

If there is insufficient information, please outline any plans to remedy this?

Part 3. Analysing and assessing the impact by equality Protected Characteristic group

Use the information, customer feedback and other evidence to determine upon whom the policy/service and any proposed changes would impact upon and how, highlighting where these are negative or positive, including where this could constitute unfair treatment, additional inequality or disadvantage or result in hardship and exclusion.

Against any identified negative potential impacts, you must provide details of any action or options which could mitigate against this, and in serious cases, you should highlight where the Council would be advised not to proceed with a new or changing policy or service, including any proposals which are being considered.

Please use your action plan attached to this analysis to record the action and the monitoring which would take place to deliver such mitigation.

Proposals Impacts		
<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
1. Age	If the proposal goes ahead this would include transfer of charging contributions for short breaks within a residential setting to the proposed revised community charging policy. Currently older people who access short breaks within a residential setting are charged under the residential policy and pay standard rate contributions on top of any charge for their community support. This change would	Derbyshire is known to have higher numbers of older people (65 plus) compared to other areas and is above the England average. 55.99% of existing people in Derbyshire in receipt of adult social care support are over pension age. Derbyshire has higher numbers of older people in receipt of Adult Social care support services compared to younger people.

Proposals Impacts

<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
	<p>ensure older people requiring this type of support are not penalised, and charging would take account of the whole of the older person's support and their individual financial circumstances.</p> <p>At present, the Council's charging arrangements are not sustainable. Making the system more financially sustainable safeguards the Council's ability to ensure that older people with who most need the Council's support are able to access it</p>	<p>Therefore, the policy is likely to impact more on older people more than younger people. It should be noted whilst income from employment is disregarded from a financial assessment whilst it is being earned, occupational pension income (which arises from earnings) is not similarly disregarded. This potential differential, arising from the consequences of regulations, may have a greater impact on older people for example those in receipt of occupational pensions. It should be noted the National Minimum Income Guarantee is more generous to older people.</p> <p>Proposing to use the Government Minimum Income Guarantee may adversely impact on all age groups as these amounts are lower in comparison to the Council's own Minimum Income Guarantee which means people would have a lower amount they can be left with.</p> <p>The Council's Minimum Income Guarantee currently only distinguishes between over pension age and under pension age. Therefore, adopting the Government National Minimum Income Guarantee means people</p>

Proposals Impacts		
<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
		<p>aged 18-24 are affected more. The cohort accounts for the smallest amount of people the Council currently support and people in this age group generally have less income, so impact is likely to be minimal. For younger generations who have on-going disability or a long term health condition, they would be impacted by the charging policies for longer period of their lives.</p> <p>Charges would only be levied against those the law says can afford to pay them, following individual financial assessment.</p>
2. Disability	<p>If the proposal goes ahead this would include transfer of charging contributions for short breaks within a residential setting to the proposed revised community charging policy. Currently disabled people who access short breaks within a residential setting are charged under the residential policy and pay standard rate contributions on top of any charge for their community support. This change would ensure disabled people requiring this type of support are not penalised, and charging</p>	<p>Applying the national Minimum Income Guarantee plus 10% would leave disabled people with less disposable income. The introduction of the standard £20 Disability Related Expenditure disregard and a robust transparent Disability Related Expenditure process for those who consider that their disability or long term health condition impacts their daily costs of living at a higher amount would ensure additional daily expenditure related to disability is disregarded. The Council would also disregard the difference</p>

Proposals Impacts

<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
	<p>would take account of the whole of the older person's support and their individual financial circumstances.</p> <p>At present, the Council's charging arrangements are not sustainable. Making the system more financially sustainable safeguards the Council's ability to ensure that people with disabilities who most need the Council's support are able to access it.</p>	<p>between the lower and higher rate of Attendance Allowance and Personal Independence Payment (Daily Living Component) and the difference between the mid and high rate of Disability Living Allowance. This would ensure that additional daily living costs incurred by disabled people or people with a long term health condition are recognised and protected.</p> <p>Decisions not to take advantage of Council services because of the costs involved could affect the person's health and/or wellbeing and/or an increased demand upon carers.</p> <p>The proposed policy is therefore likely to impact more on disabled people than non-disabled people. However, charges would only be levied against those the law says can afford to pay them, following individual financial assessment</p>

Proposals Impacts		
<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
3. Gender Re-assignment	It is not considered likely there are specific impact on grounds of gender identity, but the Council does not currently hold this information.	There is not enough information on the gender reassignment of people who access adult social care support in the community or carers to draw meaningful conclusions. However, it is not anticipated that the proposed changes would have a disproportionately negative or positive impact on people who have a gender that is different to the gender assigned to them at birth.
4. Marriage & civil partnership		<p>Currently, the Council financially assesses people as single people regardless of their relationship status. Under the proposals this would change as people's individual circumstances would be considered in line with adopting the Government Minimum Income Guarantee, which specifically considers people in relationships. This recognises people living with a partner can share costs of living whilst those in single households bear the whole of these costs. The proposal to move to the national Minimum Income Guarantee rates which recognise this additional financial burden for single people.</p> <p>The proposed policy is therefore likely to impact more on those people who are married</p>

Proposals Impacts		
<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
		or in a civil partnership in contrast to the current policy.
5. Pregnancy & maternity	n/a	From the information we have it is not believed that the type and quality of care and support would be impacted negatively for someone who is pregnant or on maternity leave.
6. Race & Ethnic Origin	n/a	Whilst the policy is itself it unlikely to have an impact on grounds due to racial or ethnic origin of race, it is recognised some people whose first language is not English may have difficulties understanding the policy due to any language or associated barriers. Support would be put in place to address this including information provided in people's first language and access to translation services.
7. Religion/Belief	It is not considered likely there are specific impacts on the grounds of religion/belief.	
8. Sex or Gender	In seeking to deliver a consistent/ fair framework following an assessment approach applicable to all, the policies are gender neutral.	Within Derbyshire there is a higher proportion of women in receipt of adult social care support in the community than men. Figures vary from time time but currently,

Proposals Impacts		
<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
		<p>approximately 57.18% of people receiving such support are women in comparison to 42.65% who are men. Therefore, women are potentially more negatively affected than men.</p> <p>Women tend to have salaries and lower pension entitlements compared to men but this may vary based on individual circumstances, for example, whether they have been able to gain income through earnings. Charges would only be levied against those the law says can afford to pay them, following individual means tested financial assessment.</p> <p>The recommended proposal includes a standard Disability Related Expenditure disregard of £20 per week. In addition, should people feel they incur Disability Related Expenditure above the standard £20 per week they would be able to make an application, supported by evidence, for additional Disability Related Expenditure which would be assessed in accordance with the proposed updated Disability Related Expenditure Policy, which would reduce impact.</p>

Proposals Impacts		
<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
9. Sexual orientation	It is not considered likely there are specific impacts on grounds of sexual orientation.	
10. Human Rights		Potentially someone may refuse or reduce services due to the proposed increase in charges and as a consequence end up living in conditions that are a risk to themselves. Under the Care Act 2014 Adult Social Care has statutory responsibilities in relation to Safeguarding. These statutory responsibilities are not subject to charging and provide safeguards for the most vulnerable.
Other		
11. Community and Voluntary sector organisations working with protected characteristic groups	N/A	N/A
12. Carers including unpaid carers	Where a personal budget is made available or support is provided for carers support following a “carers assessment,” the Council would not request a financial contribution from the carer.	During the consultation respondents raised the possibility that higher charges for their cared for person may increase the burden on them if the person chooses to reduce the level of Adult Social Care Support.

Proposals Impacts

<i>Protected Characteristic or Group</i>	<i>Actual or potential positive outcome/ impact</i>	<i>Actual or potential negative outcome/ impact</i>
13. Deprivation	<p>The existing policy has a criteria for using non-means tested benefits for determining a person's charge. If a person is not in receipt of the specified benefit, they are not charged a fee, regardless of whether they could afford to contribute as set out in the national guidelines. The recommended proposal would mean everyone would be treated in the same way and people would be charged 90% of their disposable income. This would allow people to retain an additional 10% more than the national guidelines set out. The national guidelines set out Minimum Income Guarantees and Capital / Asset limits ensuring those with low income or low capital assets receive financial support to pay for their Adult Social Care Support.</p>	

Part 4. Summary of main findings

This Equalities Impact Analysis has been completed to consider the potential impact of implementing the proposed amended Charging Policy for all people including those in protected characteristic groups, also additional groups and `impact` in the broadest sense as to who may be affected by the proposals.

The outcome of this EIA with the consideration of the public consultation analysis, highlights there are more negative impacts than there are positive, and some groups identified could be impacted more so than other groups. It is worth noting that the reason for this is not because the proposals target these groups in any way, the nature of social care needs are such that the Council's major cohort of people using adult social care services relates to age and disability.

Considering the proposals, it is recognised all groups and existing people in receipt of adult social care support are likely to be affected in some way, whether this is positive, negative, or neutral, even if the outcome is the person is charged less than they currently pay. The proposals would mean all people would be treated individually and all people would be charged for their services only up to an amount they are deemed able to afford, as set by the national guidelines.

Under the proposals each person receiving chargeable care would have an individual means-tested full financial assessment based on their specific situation. This moves away from historical light touch financial assessments. It is proposed the assessment process would begin in January 2024 to ensure people have prior notice to prepare for the new charges.

Every person already in receipt of adult social care support in the community would be offered a review of their care and support plan, unless a review has been undertaken in the last 6 months, to ensure they are in receipt of the most appropriate care for their needs.

During the transition period, the Council would ensure sufficient support, information and guidance was available to assist people. This may include referrals to Welfare Rights or people signposted, where appropriate, to the online *Welfare Rights Better Off*, to maximise their income.

There is a national statutory framework taking into account extra expenditure that people incur in relation to disability or a long term health condition; this is known as Disability Related Expenditure. A Local Authority must take this expenditure into account in financial assessments to make sure that people who pay towards their care and support have enough money to live on. It is recommended that the Council adopts a new Disability Related Expenditure Process. This would include a standard £20 disregard but would permit individuals to apply more of their expenditure defined as Disability related. The Council would also disregard the difference between the lower and higher rate of Attendance Allowance and Personal Independence Payment (Daily Living Component) and the difference between the mid and high rate of Disability Living Allowance. This would ensure that additional daily living costs incurred by disabled people or people with a long term health condition are recognised and protected.

The Council considers that offering standard rate of disregard would make the process less onerous for disabled people. If no standard disregard is offered, this would require a large number of people to go through the Disability Related Expenditure Process. This would be more onerous for people receiving Adult Social Care support in the community and would place an additional administration burden on them. Therefore, if an individual's Disability Related Expenditure is generally £20 or less, they would not need to go through this administrative process. The Council believes that this level would cover the majority of additional daily living costs faced by disabled people and people with a long term health condition.

Careful consideration has been given to the right level for any standard disregard rate. To this end, research was completed across other Local Authorities who currently charge in line with the national guidance. This showed that a number of Local Authorities do not offer a standard disregarded amount. For those Local Authorities who do offer a standard rate varies, the average disregarded sum varies. In the end, the Council has identified the rate of £20 per week, which is offered by Nottinghamshire County Council. This rate was arrived at by Nottinghamshire County Council in cooperation with people with relevant lived experience. This standard rate would be reviewed on a yearly basis.

Individuals whose Disability Related Expenditure exceeds this level would be able to make an application for a higher amount to be disregarded. For the purpose of assessing applications, a specialist team would be established to support disabled people and people with a long term health condition who consider their daily living costs linked to their disability or long term health condition to be higher. This would ensure any additional claims can be dealt with by colleagues who have specialist knowledge, applying a transparent, accessible and straightforward process.

Part 5. Equality Action Plan

Please complete this Action Plan for any negative or unknown impacts identified in the Analysis above.

Issue identified	Action required to reduce impact/mitigate	Timescale and responsibility	Monitoring and review arrangements
Age / Deprivation – A significant number of people would contribute more towards their care costs with a bigger impact on older people. People have shared they are concerned about the level of disposable income they would retain and affordability if the Co-funding policy was amended as proposed	<p>People receiving Local Authority-arranged support other than in a care home need to retain a certain level of income to cover their living costs. Under the Care Act 2014, charges must not reduce people's income below a certain amount, but local authorities can allow people to keep more of their income if they wish. This is a weekly amount is known as the Minimum Income Guarantee. The rates of the Minimum Income Guarantee are set annually and the current rates may be found here.</p> <p>If the recommended proposal goes ahead people will be charged on 90% of their disposable income. This would allow people to retain an additional 10% more than the national framework provides for.</p>	Ongoing - in line with implementation of Cabinet report recommendations.	If agreed, implementation would take place over a six month period. A Monitoring and Review Group would be created that would oversee the implementation of any proposals agreed by Cabinet. This would identify where any other adjustments may need to be considered to support people.

	<p>Adult Social Care Practitioners, Welfare Rights Team and the Financial Assessment Team are available to support people to maximise their income.</p> <p>If the proposal is agreed implementation would take six months and the new Charging Policy would start on 15 July 2023.</p> <p>The Financial Assessment Team would undertake individual financial assessments between January 2024 and April 2024 to ensure people are aware of any changes to their charges in advance and therefore would understand their financial circumstances and be able to financially plan for any change.</p> <p>The recommended proposal also includes a standard Disability Related Expenditure disregard of £20 per week. The Council recognises that not offering a standard rate would be more</p>		
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	<p>onerous for people receiving Adult Social Care support in the community and would place an additional administration burden on them to request a disregard. The proposal enables people to automatically retain £20 of their income each week.</p> <p>The Council would also disregard the difference between the lower and higher rate of Attendance Allowance and the difference between the mid-rate and higher rate of Disability Living Allowance.</p> <p>The Council believes the amount set out above covers the majority of additional daily living costs faced by disabled people and people with a long term health condition.</p> <p>In addition, should people feel they incur Disability Related Expenditure above the standard £20 per week they would be able to make an application, supported by evidence, for</p>		
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	<p>additional Disability Related Expenditure which would be assessed in accordance with the proposed updated Disability Related Expenditure Policy.</p> <p>The merits of the application would then be considered by a specialist team who would undertake a detailed analysis to determine the outcome. The proposed policy would create transparency and provide an accessible straightforward process. Any decision made about additional Disability Related Expenditure would be subject to any relevant evidence submitted and the person's ability to afford to contribute.</p> <p>This process would ensure no-one would suffer undue financial hardship.</p> <p>If the outcome of the financial assessment and any additional Disability Related Expenditure concludes the person is not eligible for a reduction of their</p>		
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	<p>contribution, they would be able to ask for this decision to be reviewed.</p> <p>Where it is deemed people must pay for the full cost of their care, as they have capital above £23,250 or disposable income above the cost of their care, they would be supported by the relevant team to ensure the provision of their care and support needs remains the priority and would be supported with managing with their ongoing care needs.</p> <p>The Care Act 2014 and Care Act Statutory Guidance enables a person who can afford to pay for their own care and support in full to ask the local authority to arrange their care on their behalf</p>		
Disability – More people with disabilities are in receipt of support than those without disabilities. A change in	People receiving Local Authority-arranged support other than in a care home need to retain a certain level of income to cover	Ongoing - in line with implementation of	A Monitoring and Review Group would be created that would oversee the implementation of any proposals agreed by Cabinet.

<p>approach to the application of the Minimum Income Guarantee following the consultation, may mean they may be worse off, due to an increase in contribution charges.</p> <p>People already in receipt of care reducing or ending support or new people assessed as eligible for support declining to receive the care as a result of an increased charge by amending the Co-funding policy.</p>	<p>their living costs. Under the Care Act 2014, charges must not reduce people's income below a certain amount, but local authorities can allow people to keep more of their income if they wish. This is a weekly amount and is known as the Minimum Income Guarantee. The rates of the Minimum Income Guarantee are set annually and the current rates may be found here.</p> <p>If the recommended proposal goes ahead people would be charged on 90% of their disposable income. This would allow people to retain an additional 10% more than the national framework sets out.</p> <p>Adult Social Care Practitioners, Welfare Rights Team and the Financial Assessment Team support people to maximise their income.</p> <p>If the proposal is agreed implementation would take six months and the new Charging</p>	<p>Cabinet report recommendations</p>	<p>This would identify where any other adjustments may need to be considered to support people.</p>
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	<p>Policy would start on 15 July 2023. The Financial Assessment Team would undertake individual financial assessments between January and April to ensure people are aware of the changes to their charges in advance and therefore would be able to financially plan.</p> <p>The recommended proposal also includes a standard Disability Related Expenditure disregard of £20 per week. The Council recognises that not offering a standard rate would be more onerous for people receiving Adult Social Care support in the community and would place an additional administration burden on them.</p> <p>The Council would also disregard the difference between the lower and higher rate of Person Independent Payments (Daily Living Component) and the difference between the mid-rate and higher rate of Disability Living Allowance.</p>		
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	<p>The amount set out above would cover the majority of additional daily living costs faced by disabled people and people with a long term health condition.</p> <p>In addition, should people feel they incur Disability Related Expenditure above the standard £20 per week they would be able to make an application, supported by evidence, for additional Disability Related Expenditure which would be assessed in accordance with the proposed updated Disability Related Expenditure Policy.</p> <p>The merits of the application would then be considered by a specialist team who would undertake a detailed analysis to determine the outcome. The proposed policy would create transparency and provide an accessible straightforward process. Any decision made about additional Disability Related Expenditure would be</p>		
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	<p>subject to any relevant evidence submitted and the person's ability to afford to contribute.</p> <p>This process would ensure no-one would suffer undue financial hardship.</p> <p>If the outcome of the financial assessment and any additional Disability Related Expenditure concludes the person is not eligible for a reduction of their contribution, they would be able to ask for this decision to be reviewed.</p> <p>The Care Act 2014 and Care Act Statutory Guidance enables a person who can afford to pay for their own care and support in full to ask the Local Authority to arrange their care on their behalf</p>		
People with a disability or long term health condition not being fully informed of the changes to	Should the proposals be agreed, a communication plan will be drawn up with the final proposal.	Ongoing - in line with implementation of	A Monitoring and Review Group would be created that would oversee the implementation of

the Co-funding policy or understanding it due to inaccessible communication, and/or people with a disability experiencing anxiety or stress as a result of amending the Co-funding policy.	<p>This would set out how and when communication would be available to existing people with care packages and new people accessing the service for the first time. This would include accessible information in a variety of ways using plain English, for example, leaflets; webpages, liaising where appropriate with local private, voluntary and the independent sector in the community.</p> <p>If the proposal is agreed implementation would take six months and the new Charging Policy would start on 15 July 2023. The Financial Assessment Team would undertake individual financial assessments between January 2023 and April 2023 to ensure people are aware of the changes to their charges in advance and therefore would be able to financially plan.</p>	Cabinet report recommendations	any proposals agreed by Cabinet. This would identify where any other adjustments may need to be considered to support people.
Carers - Concerns arising on impact to carer health / emotional wellbeing if the	Every person already in receipt of Adult Social Care support in the community would be offered	Ongoing - in line with implementation of	A Monitoring and Review Group would be created that would oversee the implementation of

<p>person choices to reduce the level of Adult Social Care Support.</p>	<p>a review of their care and support plan, unless a review has been undertaken in the last 6 months, to ensure they are in receipt of the most appropriate care for their needs.</p> <p>Where a personal budget is made available or support is provided for carers support following a “carers assessment,” the Council would not request a financial contribution from the carer.</p> <p>We intend to work with Derbyshire Carers to offer joint support where required.</p> <p>The Care Act 2014 and Care Act Statutory Guidance enables a person who can afford to pay for their own care and support in full to ask the local authority to arrange their care on their behalf.</p>	<p>Cabinet report recommendations</p>	<p>any proposals agreed by Cabinet. This would identify where any other adjustments may need to be considered to support people.</p>
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Derbyshire County Council Adult Social Care Charging Contribution Policy for People receiving Adult Social Care Support in the Community

Contents

Derbyshire County Council Adult Social Care Charging Contribution Policy for People receiving Adult Social Care Support in the Community	1
Contents.....	1
1. Legal Framework.....	1
2. Policy Aims and Objectives	2
3. Principles of the Policy	2
4. Reviews of the Policy	4
5. Financial Contribution Procedures.....	4
6. Income Maximisation.....	5
7. Treatment of Income	7
8. Treatment of Capital.....	7
9. Disability Related Expenditure (DRE)	8
10. Basic Income Levels	8
11. Unmet Housing Needs	9
12. Treatment of Couples (Including Civil Partners).....	10
13. Dependent Children	11
14. Maximum and Minimum Contributions.....	13
15. Notification of Contributions.....	13
16. Financial Declarations	13
17. Deprivation of Assets.....	14
18. Changes in Circumstances.....	15
19. Compensation for Personal Injury.....	17
20. Performance Standards.....	17
21. Quality Monitoring and Evaluation	18
Appendix 1 – Current Minimum Income Guarantee, Benefit Levels and Capital Bandings	19
Appendix 2 – Disability Related Expenditure	22
Appendix 3 – Heating Allowances	25

1. Legal Framework

- 1.1 Under the Care Act 2014, Local Authorities have discretion to choose whether to charge for Adult Social Care community support provided for people to meet eligible needs, except where it is required to arrange care and support

free of charge (such as certain types of community equipment, short term reablement support or if the care is to be provided free under other legislation for example section 117 of the Mental Health Act which entitles people to receive free aftercare following compulsory detention in hospital).

- 1.2 The Council will, also, apply the principles set out in the Mental Capacity Act 2005 concerning people who lack capacity to manage their finances. Where someone lacks capacity to make decisions about their finances, the Council will try to identify whether they have appointed an attorney under a lasting power of attorney for finances or whether an order has been made by the Court of Protection appointing a deputy for their finances. The attorney or deputy is a lawfully appointed representative.
- 1.3 Where a person has no lawfully appointed representative, the Council will communicate with family members to obtain financial information and encourage family members where appropriate to apply to the Court of Protection to be appointed as deputy of the person's finances. Only where there are no family members or friends, will the Council consider applying to be appointed as the person's appointee for benefits or deputy for their finances.

2. Policy Aims and Objectives

- 2.1 The Council's Adult Social Care charging contribution policy for people receiving Adult Social Care support in the community has been written to comply with the Care and Support (Charging and Assessment of Resources) Regulations 2014 and has regard to the national guidelines.
- 2.2 The aim of the policy is to provide a transparent and fair charging framework for people who are receiving Adult Social Care support in the community.

3. Principles of the Policy

- 3.1 Any charging contribution for Adult Social Care support in the community requested will be in line with the current Care and Support (Charging and Assessment of Resources) Regulations 2014, which includes the following principles:
 - Applying the national Minimum Income Guarantees for people, which are dependent on age, disability or other living circumstances as defined by the department of Health and Social Care
 - If the person has a dependent child, the appropriate additional allowance will be added on top of the person's Minimum Income Guarantee
 - Giving the person an applicable allowance in respect of savings credit (this

is extra money paid each week for people who have above a certain threshold)

- Disregarding the whole value or proportion of the value (if co-owned) of the main, owned residence of the person.
- Assessing the person's capital assets and savings in line with the charging regulations and the statutory guidance
- Not including the earnings of people who work in the calculation of household income
- Disregarding the person's partners' income and savings (unless received as part of a joint entitlement)
- The relevant allowances will be made for people in relation to unmet housing costs
- Disregard of any income assessed as being used by the person to meet additional daily living costs incurred due to the person's disability or long-term health condition. The Council will also disregard the difference between the middle and higher rate of Attendance Allowance and Person Independent Payments.

All the principles above are explained more fully in later sections of this policy

- 3.2 Charging contributions will be determined against the person's confirmed personal budget. The contribution charged will not exceed the personal budget or the cost of support commissioned.
- 3.3 People (or their legally appointed representative(s)) will be asked to visit www.derbyshire.gov.uk/betteroff where they should submit their financial information for review by the Finance Team who will confirm the contribution charge due. Relevant supporting evidence must be provided.
- 3.4 Alternatively, should a person, who does not have a legally appointed representative, prefer the Council to liaise with a named relative or friend to act as their representative they will be required to provide consent to ensure this can take place. The person's representative will be expected to provide full and accurate financial information with supporting evidence and to be willing to sign a financial declaration to that effect.
- 3.5 Where it is not possible for the person to use www.derbyshire.gov.uk/betteroff and they are without either formal or informal support to submit their financial information online, the person will be supported by telephone to give a full declaration of their financial circumstances, including submission of supporting evidence to allow the determination of the correct contribution level.
- 3.6 The Council will access data provided by the Department for Work and Pensions and other agencies for details of benefits, allowances and occupational pensions to verify financial assessments. The Council is entitled

to undertake these checks in line with the data sharing agreements between the Department for Work and Pensions and Local Authorities, following the introduction of the Welfare Reform Act 2012.

- 3.7 Charging contributions, for those people who receive support through a direct payment or commissioned on their behalf, will be collected by the Council usually by direct debit every 4 weeks. Charging for Adult Social Care support occurs in arrears.
- 3.8 The non-payment of charging contributions could lead to the instigation of debt recovery procedures which may include formal legal action.
- 3.9 Following the completion of the financial assessment people or their representative(s) will be able to request their financial assessment to be reviewed and if the issues remain unresolved, they will have recourse through the Complaints Procedure.

4. Reviews of the Policy

- 4.1 Guidance recommends local authorities should review their charging contribution policy annually, in consultation with stakeholders.
- 4.2 Any adjustments necessary after attaining state pension age will be applied from the beginning of the next financial year unless the person requests an earlier assessment.

5. Financial Contribution Procedures

- 5.1 People who receive the following community support, as set out in the national guidelines, will not be required to make a charging contribution:
- short term services/interim reablement support services fully funded by the NHS under the continuing health care (CHC) provisions
 - after care support provided under Section 117 of the Mental Health Act
 - community equipment (aids and minor adaptations costing £1,000 or less)
 - advice or assessment and review support
 - any service provided to a person with Creutzfeldt Jakob Disease (CJD)
- 5.2 People who receive the following long term community support as set out in the national guidelines will be required to make a charging contribution:
- Short Breaks in a respite care in a registered care home setting
 - Short Breaks: provided through Direct Payments or Shared Lives
 - Direct Payments

- Long Term Homecare
- Day Care
- Supported Living
- Other community-based care provision

- 5.3 Where a personal care budget is made available or support is provided for carers support following a “carers assessment,” the Council does not request a financial contribution from the carer.
- 5.4 For those people who have financial resources under the capital limits or income thresholds the Council will use its discretion to not request a financial contribution from those people who are terminally ill. Terminal illness is defined as arising where a person has received a prognosis of less than twelve months life expectancy. Confirmation of this is required from a relevant health professional or by the completion of a SR-1 form designed for the purposes of claiming benefit payments under the special rules provisions.
- 5.5 Where this discretion has been applied and, due to terminal illness, a person has not been required to make a financial contribution, this decision will be reviewed after 12 months of the original decision where the person is still receiving Adult Social Care support in the community. The care co-ordinator will make a formal approach, involving relevant health care professionals, to seek their current opinion of the person’s condition and prognosis. At this 12 month review, for the nil contribution to continue, a health professional will need to formally confirm that in their professional opinion, the person has a terminal illness with a prognosis of less than 12 months life expectancy. This includes those people who were awarded benefits under the special rules provisions.
- 5.6 Where the prognosis has changed from the previous decision, and the person no longer meets the requirements of 5.5 above or the criteria for special rules, the person will be financially assessed in accordance with this policy. Any contribution will be due from the completion date of the financial assessment.
- 5.7 The Care Act 2014 and Care Act Statutory Guidance enables a person who has been assessed as having to pay for their own care and support in full to ask the local authority to arrange their care on their behalf.

6. Income Maximisation

- 6.1 For people approaching the Council for a care needs assessment, a referral will be offered for people to receive an income maximisation check.

- 6.2 For the income maximisation check to be carried out, people will be asked to visit where they can complete a benefits check to assess their income and identify any benefits or allowances they may be entitled to.
- 6.3 Where it is not possible for the person or their representative to undertake the income maximisation and/or contribution determination in BetterOff, they will be signposted to a colleague in the Welfare Rights Team.
- 6.4 The person, or their representative, may be requested, and supported, to supply relevant documentary evidence to ensure that correct applications can be made for relevant benefits /allowances not currently being received.
- 6.5 Where it would appear the outcome of this income maximisation exercise may change any previous contribution, the Welfare Rights Team will make the person aware of this information and that the outcome of the benefit claim will be notified to the Finance Team.
- 6.6 Notification of the result of the income maximisation exercise will be passed to the Finance Team who will then verify the contribution; formally notify the person or their representative(s) of the weekly charging contribution due, how this has been calculated and of the arrangements for payment. This information will be provided as promptly as possible, once a person's needs have been assessed and a decision has been made about the care to be provided, or after any increase in charging contribution.
- 6.7 Under this Adult Social Care Charging Contribution policy, there is an expectation that people or their representative(s) will claim/apply for any additional income that the income maximisation exercise identifies.
- 6.8 The Council fully supports a person's right to seek independent advice on benefits, allowances and income issues, and that in these circumstances they may decline an income maximisation check. However, they, or their representative will be required to declare their income and capital in full and evidence that all relevant benefits/allowances have been claimed.
- 6.9 Any refusal by the person or their representative(s), to apply for any benefits/allowances that income maximisation or independent advice identifies as likely to be due, will result in any charging contribution being determined as though the relevant benefits /allowances are being received.
- 6.10 Charging contributions will reflect the identified increased benefit/allowances income during the period the claim is being made. However, any additional amount may not be charged until such time as the additional income has or would have been received by the person, at which point any outstanding contribution will be required to be paid.

7. Treatment of Income

- 7.1 This policy has regard to the treatment of income in line with the Care and Support Statutory Guidance
- 7.2 All forms of income, except for earnings, will be considered in the financial assessment.
- 7.3 An amount equal to 10% of weekly income will be disregarded from the amount considered to disposable income in the person 's financial assessment. Disposable income is the amount of income which may be taken into account for charging purposes after deduction of the Minimum Income Guarantee, appropriate allowances for housing costs, dependent children and Disability Related Expenditure.
- 7.4 The level of Minimum Income Guarantee is set nationally annually and is dependent on age, disability or other living circumstances as defined by the Department of Health and Social Care.

8. Treatment of Capital

- 8.1 This policy has regard for to the treatment of capital in line with the Care and Support Statutory Guidance
- 8.2 The value of a person's property which is owned, or part owned, and which is their main residence is not treated as a capital asset for the purposes of Adult Social Care charging contribution policy for people receiving Adult Social Care support in the community.
- 8.3 The value of any property owned (or share of) which is not the main residence of the person, will be treated as a capital asset for the purpose of the financial declaration. This will also apply to the value of any second and subsequent properties and land owned both in the United Kingdom and abroad.
- 8.4 Any capital held by the person which has been acquired through equity release will be treated as available capital for the purpose of this policy.
- 8.5 There may be instances where a person's capital is not held as available assets (for example a second property). In these circumstances it is likely that the person would be liable for the full cost of their care. Where it is not possible for the capital element of the contribution to be made available from other resources, the Council will consider accruing this proportion of the contribution for a limited time (up to six months) whilst alternative arrangements for funding, such as from equity release, are explored. If it

considers it necessary, the Council may require the person or their representative(s) to enter into a formal agreement to secure the debt and ensure any monies due are ultimately repaid.

9. Disability Related Expenditure (DRE)

- 9.1 Disability Related Expenditure describes the additional money a person may need to spend due to their disability or long term health condition. This expenditure must be taken into account in the financial assessment to make sure people who pay towards their care and support have enough money to meet those additional needs. Full guidance on Disability Related Expenditure is at Appendix 2.
- 9.2 The Council uses two mechanisms to support people who incur additional costs as a result of their disability or long-term health condition.
- The Council will apply a standard £20 per week disregard in respect of disability related expenditure for all people without the need for receipts or explanations of that expenditure.
 - If a person is in receipt of the higher rate of either Attendance Allowance, Personal Independence Payment (Daily Living) or Disability Living Allowance (Care), an amount equivalent to the low rate of both Attendance Allowance and Personal Independent Payment and the mid-rate of Disability Living Allowance will be used in the financial assessment. The remaining balance is then available as disposable income which could be used to meet costs associated with disability but not deemed as eligible needs.
- 9.3 Where a person feels they have additional costs related to their disability or long term health condition, over and above the standard £20 (or where relevant, the standard £20 plus the additional allowance as per the above bullet point), they are entitled to request an individual assessment of their disability related expenditure which may result in a further reduction of their assessed contribution

10. Basic Income Levels

- 10.1 In determining the basic income levels and Minimum Income Guarantee the Council will comply with the Care and Support (Charging and Assessment of Resources) Regulations 2014 and have regard to the Care and Support Statutory Guidance.

- 10.2 Where a person has an eligible dependent child in their household an allowance for each eligible child will be given when calculating the Minimum Income Guarantee in compliance of the Care and Support (Charging and Assessment of Resources) Regulations 2014.
- 10.3 In addition to ensuring a person's income is protected at the relevant Minimum Income Guarantee level (Appendix 1), the Council will protect a further 10% of the income eligible for charging purposes, after any allowances or deductions in respect of either housing costs or disability related expenditure.
- 10.4 Tariff income from capital will be determined in accordance with the upper and lower thresholds in the Care and Support Statutory Guidance.
- 10.5 Any calculated tariff income will be included in the determination of a person's eligible income for charging purposes. This will be reviewed annually, or more frequently should the council become aware of a material change to a person's capital or receive a request to conduct a review based on such a change, and adjustments made accordingly.
- 10.6 The current values of the Minimum Income Guarantee can be found in Appendix 1.

11. Unmet Housing Needs

- 11.1 The Council, in line with treatment of income in the Care and Support Statutory Guidance, will have regard to unmet housing costs in the determination of charging contributions. For the purposes of this policy unmet housing costs are defined as:
- mortgage payments net of any benefits provided to support these costs
 - rent net of any benefits provided to support these costs
 - Council tax net of any benefits provided to support these costs
 - service charges (net of utilities)
 - ground rent
- 11.2 For an allowance of unmet housing costs to be made, the person must provide evidence of their formal occupancy status along with details of the formal rent agreement with their landlord or housing association or the liability for mortgage payments.
- 11.3 Unmet housing costs do not include non-commercial "sublet" tenancies or non-commercial "board and lodging" payments made to the tenant/owner of the property in which the person may reside.

- 11.4 For board and lodging payments or subletting rental payments to be classed as a housing cost, it must be paid on a commercial basis and must not be provided by a close relative or family member (as defined in the guidance) of the person. Relevant evidence of the commercial arrangement will need to be supplied for consideration if the appropriate allowance to be made.
- 11.5 For any allowance for unmet housing costs to be given, evidence of both the cost and the shortfall will need to be provided. Where no evidence is provided, then no allowance(s) will be given.
- 11.6 Where an income maximisation check or independent advice identifies benefits that are due in relation to housing costs it is expected that the person or their representative will, with or without support, make the appropriate application(s) for those benefits.
- 11.7 Where a person or their representative declines to make an application for assistance with housing costs, the Council will calculate their charging contribution as if those benefits /allowances were in payment.
- 11.8 Where there is a change in the person's financial circumstances which affects the level of unmet housing costs then the Council should be notified, and where requested, and relevant supporting evidence provided.
- 11.9 Failure to promptly notify the Council of any increase in unmet housing costs will result in any assessed increase in the allowance only being given from the date of the notification and supporting evidence.
- 11.10 Failure to promptly notify the Council of any decrease in the amount of unmet housing costs will result in a reassessment of the charging contribution from the day it is considered the reduction in unmet housing allowance would have been applied. If this reassessment results in arrears of charging contributions being due, then these must be paid in full.

12. Treatment of Couples (Including Civil Partners)

- 12.1 When completing a financial assessment for a person in a couple or civil partnership, the Council will have regard for the treatment of income and assets in line with treatment of capital and treatment of income within the Care and Support Statutory Guidance.
- 12.2 The Council will only have regard to a person's means and not their partner's means when assessing their ability to make a charging contribution.

- 12.3 Each person of a couple will be deemed to hold equal shares of capital held together unless evidence is provided to the contrary.
- 12.4 Where means tested benefits are assessed/received jointly, for example employment support allowance, pension credit, universal credit or income support, each person will be deemed to have a right to 50% of that income for the purposes of determining their minimum income level.
- 12.5 Where allowances or disregards are applied, for example. for unmet housing, it is assumed that each person within a partnership has equal liability for such costs and any allowance will be made on that basis.

13. Dependent Children

- 13.1 A dependent child allowance can be applied to a financial assessment, subject to eligibility and satisfactory supporting evidence. For this policy the definition of a dependent child is as follows:
- a. The child can be up to 18 years of age (or 19 years of age, if they started non-advanced education or training as defined in 13.8 and 13.9 prior to their 19th birthday); and
 - b. Must be either:
 - Of pre-school age; or
 - In full time non advanced education, see 13.8 below; or
 - Attending approved unwaged training, see 13.9 below; and
 - c. The child lives in the same household as the person; and
 - d. The person receives child benefit and/or child tax credits or universal credit for the child, or they are not in receipt of child benefit and/or child tax credits as they have income above the upper earnings threshold but would be entitled to those benefits were their income to reduce.
 - e. Where the person requesting a “dependent child allowance” satisfies points a-c but is not the recipient of the relevant qualifying benefits (point d) but is the spouse, civil partner or unmarried partner (as defined for state benefit purposes) of the qualifying benefit recipient, the allowance will be given.
- 13.2 The Council will consider on an individual basis the continuation of a dependent child allowance when the child is over the age of 18 years where points b to e still apply.

- 13.3 Where all the above criteria are not met, or the required evidence to confirm eligibility to the dependent child allowance not provided, then no allowance for that child will be made when determining the charging contribution.
- 13.4 The Council reserves the right to only include any dependent child allowance in the calculation of the charging contribution from the date that all relevant information and evidence is provided to the Council.
- 13.5 The person must promptly notify the Council if they believe their entitlement to a dependent child allowance has changed. Reasons to notify may include, but are not limited to, the child attaining 16 years of age:
- is not in full time non advanced education
 - no longer attends approved unwaged training
 - no longer lives in the person's household
 - the person ceases to receive child benefit/child tax credit/universal credit payments in respect of the child
- 13.6 Failure to notify the Council of any increase in the number of dependent children resident in their household will result in any requests for additional allowances only being given from the date the request and revised evidence is provided to the Council.
- 13.7 Failure to notify the Council of any reduction in the number of dependent children in the household will result in a reassessment of the charging contribution from the day the reduction should have been applied following notification. If this reassessment results in arrears of charging contributions being due, then these must be paid in full.
- 13.8 Non advanced education is defined as more than 12 hours per week at school or college (university education is not included in this description as it is deemed to be advanced education). Homework, private study, unsupervised study or meal breaks cannot count towards the 12 hours and the education can only be up to and including A-level, NVQ Level 3 or equivalent. Traineeships as part of the 16 –19 study programmes are deemed to be full-time non-advanced education. 19 year-olds can only be included if they started such before their 19th birthday
- 13.9 Approved Unwaged Training must not be provided under a contract of employment; 19-year-olds can only be included if they started such education or approved training before their 19th birthday.

14. Maximum and Minimum Contributions

- 14.1 The maximum charging contribution will not exceed the cost of the care provided.
- 14.2 Where a person's charging contribution is determined at less than £5.00 per week this will not be deemed financially viable to collect.

15. Notification of Contributions

- 15.1 All people or their representative(s) will be provided with a breakdown of how their charging contribution has been determined, either via the BetterOff portal or by the Finance Team.
- 15.2 Any charging contribution will be payable from the date the chargeable commissioned support / direct payment is first received by the person. Notification of the contribution will be provided as promptly as possible after a person's needs have been assessed and a decision has been made about the care to be provided. This will also apply where there is an increase or decrease in contribution due to a change in a person's personal budget.
- 15.3 This notification will also provide details of the initial process to follow should a person (or their representative) considers that either:
- an error has been made in the calculation of the charging contribution; or
 - they are unable to pay their assessed charging contribution; or
 - it is not reasonably practicable for them to pay their assessed charging contribution based on their financial circumstances.
- 15.4 Prompt payment of invoices will be expected. Consistent refusal to pay, cancellation of service or declining of service due to payment will lead to a risk assessment being undertaken to establish any safeguarding issues to identify any appropriate and proportionate actions necessitated.

16. Financial Declarations

- 16.1 People or their representative(s) will only be asked to disclose information that will enable an accurate income maximisation check and financial assessment to be undertaken.
- 16.2 People, or their representative(s), who refuse to submit sufficient information and appropriate evidence to enable a full financial assessment to be completed, may be assumed to be able to meet the full cost of their support

and could be advised to purchase support independently. Details of current contribution levels and capital bandings are at [Appendix 1](#). A risk assessment will be undertaken to establish any safeguarding issues to identify any appropriate and proportionate actions necessitated.

- 16.3 Any person or their representative(s) found to have given an inaccurate declaration of their financial circumstances, either knowingly or unwittingly, will be subject to a revised charging contribution determination. This determination will be undertaken irrespective as to whether they are still receiving any adult social care support in the community.
- 16.4 Any revised charging contribution, either by revised formal financial determination or default maximum cost, will be applied from the date the revised contribution should have applied. If the backdating of this charging contribution results in arrears of contributions being due, then these will be required to be promptly paid in full. Failure to make payment of any arrears of contribution will result in the instigation of debt recovery procedures which may include formal legal action.

17. Deprivation of Assets

- 17.1 When consideration is given as to whether a deprivation of assets has occurred, the Council will have regard to [Deprivation of Assets](#) - Annex E of the Care and Support Statutory Guidance.
- 17.2 In deciding whether a person has deprived themselves of income and/or capital for the purposes of reducing any contribution liability, the Council will have due regard to the timing and reason for the disposal.
- 17.3 Where the Council considers that such deprivation of assets has occurred, any contribution deemed to be due will be determined as though the person continues to receive or hold those assets.
- 17.4 Where the person has transferred an asset to a third party in an attempt to reduce their liability to contributions, the third party will be liable to pay the Council the difference between what would have been charged and the charging contribution being made by the person.
- 17.5 Where assets have been transferred to more than one third party, each of the third-parties will be liable to pay the Council the difference between what would have been charged and the contribution being made by the person in proportion to the amount they received.
- 17.6 The maximum liability of a third party will be limited to the benefit they received from the transfer.

- 17.7 People, their representative(s) and/or relevant third parties have recourse through the Complaints Procedure should they disagree with the Council's deprivation of assets decision.
- 17.8 Failure by the person or the third-party/ parties who has received the asset to make payment of the contributions will result in the instigation of debt recovery procedures which may include formal legal action.

18. Changes in Circumstances

- 18.1 People will still be required to continue to pay their assessed weekly charging contribution in periods where they do not receive support. This will include unforeseen/unplanned circumstances, for a maximum of four weeks within any financial year, providing the total charging contributions collected during the financial year will not exceed the person's annual care package costs.
- 18.2 Where the total of charging contributions made during a financial year from April to March, is found retrospectively to be higher than the value of the actual cost of care, arrangements will be made to credit the person with the amount of any overpayment.
- 18.3 People making a charging contribution from capital assets, for example, people with assets above the capital threshold when the Council has agreed to continue to commission the support on their behalf will be liable for all costs incurred by the Council until those services are cancelled.
- 18.4 If, following a reassessment of needs, a person's personal budget is increased or reduced, any necessary adjustments will be made to the charging contribution.
- 18.5 People will still be required to continue to make payment of their charging contribution for up to four weeks after any hospital admission unless the support is cancelled sooner, in which case their contribution will cease from the date of that decision.
- 18.6 Anyone discharged from hospital who receives short-term adult social care support in the community will not be required to make any charging contribution during the reablement period. However, any outstanding contributions due prior to the period of short-term support will still have to be paid.

- 18.7 Following a period of a short-term service, unless the person's financial circumstances have changed, any previously assessed charging contribution will be re-instated. This will be from the date the Adult Social Care support in the community recommences.
- 18.8 People who enter a residential setting for a period of planned respite care (Short Break) will continue to pay their assessed charge as per normal arrangements. However, if the person's preferred choice of residential care home incurs a higher rate than the Councils agreed contracting rate and there is availability at the Council's rate, the additional cost must be paid by a third party.
- 18.9 Where there is a change in a person's financial circumstances, the person or their representative(s), must notify the Council promptly as this will result in a review of their contribution.
- 18.10 Where a person or their representative notifies the Council of a reduction in their income or capital, any subsequent assessed reduction in contribution will only apply from the date a new formal financial declaration, with appropriate evidence, is given.
- 18.11 Increases in income and/or capital may result in an increase in contribution, for example, a successful claim/or backdating of benefits. Non-notification of a change in financial circumstances will result in the backdating of the increased contribution to the date of the change and arrears being due.
- 18.12 Where a person becomes aware they are the beneficiary under the terms of a last will and testament, they are required they notify the Council.
- 18.13 The Council will deem a decision to reassign or refuse to accept a legacy as deprivation of assets and reserves the right to financially assess the person as though they were in possession of those assets when determining any charging contribution.
- 18.14 In the event someone does reassign or give away a legacy but does not pay the increased charging contribution from a resulting reassessment, the Council will consider terminating any contractual agreement to purchase support on behalf of the person, subject to section 15. The Council will also consider transferring liability for any additional charging contribution to the person(s) receiving the person's share of the legacy assets (limited to the value of the legacy asset received by the person).
- 18.15 It is expected people or their representative(s), will take proactive steps to receive any legacy by doing one or more of the following:
- if the person is the executor of the estate that they take steps to administer

the estate personally, including applying for probate if necessary, or appointing an appropriate person, for example, a solicitor to do so

- if the deceased has made a will but the person is not the executor of the estate, they should make representation to the executors to ensure that legacies are made in an appropriate timeframe
- if there is no will, but the person is an entitled relative, make application for letters of administration or appoint someone to do it upon their behalf

- 18.16 If the relevant application/representations are not made within a timely manner of the deceased's demise, and without good reason, the Council reserves the right to deem the to be in possession of the legacy and may recalculate any charging contribution on their assumed revised assets.
- 18.17 All financial assessments will be reviewed annually, or more frequently should the council become aware of a material change to a person's capital or income and receive a request to conduct a review based on such a change, and adjustments made accordingly.
- 18.18 Where support ends, the charging contribution will be collected up to the day the person ceased to receive the support or the person passed away.

19. Compensation for Personal Injury

- 19.1 Compensation paid for personal injury is dealt with in different ways. This may be awarded by the Court or by an agreed settlement. The capital awarded may be paid directly to the Claimant or may be held in trust or administered by a deputy or the Court (Paid into Court Funds). Regardless of the final arrangements the person will be required to provide the Council with copies of settlement terms and/or agreements, trust documents and any court orders in relation to the compensation award including any court order appointing a deputy as part of the financial assessment process.
- 19.2 The Council will have regard to the Care and Support Statutory Guidance when considering any relevant personal injury compensation awards as part of the financial assessment process.

20. Performance Standards

- 20.1 People who come into contact with the Finance Team and the Welfare Rights Team can expect:
- To be treated with dignity and respect and in a courteous manner
 - All colleagues to have received training and be competent in their particular role
 - For the Council to only ask for information that is needed for the Care and

Support (Charging and Assessment of Resources) Regulations 2014 and the Care and Support Statutory Guidance, October 2014 or as further amended

- For all information, both personal and financial, to be treated in the strictest of confidence and not divulged without that person's consent (or where they lack capacity to consent, their representative's consent) except in cases:
- Where information is required to be shared to prevent fraud, crime and disorder,
- To prevent significant harm to adults or children as required by safeguarding children and vulnerable adult policy and procedures
- For people, or their representative, to be made aware their rights including how to contact the Finance Team to discuss or challenge a financial assessment and how to make use of the Complaints Procedure if necessary.

20.2 What we expect from people and/or their representatives:

- To treat Council colleagues with the same dignity and respect that they would expect to receive
- For representatives to show proof that they have been lawfully appointed as representatives, such as giving a copy of the Court of Protection order or the Lasting Power of Attorney for finances document to the Council
- For all questions will be fully and accurately answered
- For the contribution levied to be paid promptly by the agreed method.
- For people or their representative will raise any concerns or issues with the Council in a timely manner thereby allowing the Council the opportunity to resolve these as soon as possible
- For all additional information and documents requested will be supplied in a timely manner

21. Quality Monitoring and Evaluation

- 21.1 The Finance Team and Welfare Rights Team are subject to regular reviews to ensure compliance, accuracy and consistency.
- 21.2 People or their representatives, will be offered the opportunity to be selected to take part in surveys and reviews to monitor the finance assessment process
- 21.3 People's experience of process will include questions on:
- Interaction with employees of the department
 - Accuracy of the information requested and gathered
 - Accuracy of the contributions calculated
 - The standard of correspondence and information provided

Appendix 1 – Current Minimum Income Guarantee, Benefit Levels and Capital Bandings

Minimum Income Guarantee (MIG) Levels

People receiving local authority arranged care and support other than in a care home need to retain a certain level of income to cover their living costs. Under the Care Act 2014, charges must not reduce people's income below a certain amount, but local authorities can allow people to keep more of their income if they wish. This is a weekly amount and is known as the MIG. For the next financial year (April 2023 to March 2024), the rates of the Minimum Income Guarantee where the adult concerned are:

Situation	Weekly rate
Is responsible for, and a member of, the same household as a dependent child, the amount in respect of each dependent child	£94.90
Is a single person and is aged 18 or older but less than 25	£82.15
Is a single person and is aged 25 or older but less than pension credit age	£103.65
Has attained pension credit age	£214.35
Is a lone parent aged 18 or over	£103.65
Is a member of a couple and one or both are aged 18 or over	£81.40
Is a member of a couple and one or both have attained pension credit age	£163.65
Is a single person who is in receipt of, or the local authority considers would, if in receipt of income support, be in receipt of disability premium	£45.75
Is a single person who is in receipt of, or the local authority considers would, if in receipt of income support, be in receipt of enhanced disability premium	£22.35

Is a member of a couple and one member of that couple is in receipt of, or the local authority considers would, if in receipt of income support, be in receipt of disability premium	£32.60
Is a member of a couple and one member of that couple is in receipt of, or the local authority considers would, if in receipt of income support, be in receipt of enhanced disability premium	£16.05
Is in receipt of, or the local authority considers would, if in receipt of income support be in receipt of, carer premium,	£49.05

Attendance Allowance, Disability Living Allowance (Care) and Personal Independence Payment (PIP) – April 2023

Payment	Weekly Rate
Attendance Allowance (Low rate)	£68.10
Attendance Allowance (High rate)	£101.75
Disability Living Allowance Care (Low rate)	£26.90
Disability Living Allowance Care (Middle rate)	£68.10
Disability Living Allowance Care (High rate)	£101.75
Personal Independence Payment (Low rate)	£68.10
Personal Independence Payment (High rate)	£101.75

The difference of £33.75 per week between high and low/mid rates is disregarded for financial assessment purposes.

Capital Thresholds (For funding purposes)

Capital level above which funding is not provided	£23,250
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Capital Bandings (For tariff income)

Lower Threshold	£14,250
Upper threshold	£23,250

Tariff income is calculated based on capital between the lower and upper thresholds at £1.00 in every £250 of capital.

Maximum Weekly Contributions

Maximum chargeable 100% of Care Costs

No one will be asked to contribute more than the actual costs of services received during the financial year.

Appendix 2 – Disability Related Expenditure

What is Disability Related Expenditure?

Disability Related Expenditure is additional money people may need to spend due to their disability or long term health condition. This expenditure is taken into consideration in financial assessments to make sure people who pay towards their care and support can do so whilst also meeting needs which might not be covered in their individual care and support plan.

In recognition of increased costs associated with disability or a long term health condition, the Council has adopted a number of measures to ensure people are left with sufficient income to meet those expenses, the first two of which will happen automatically:

- Apply a standard £20 per week disregard in respect of Disability Related Expenditure for all people without the need for receipts or explanations of that expenditure.
- Disregard the remaining balance of which may then form part of a person's disposable income to be used to help meet any additional costs associated with their disability but which are not assessed as eligible needs.
- Enable people to request an application of Disability Related Expenditure of which they incur over and above the standard £20 allowance for consideration within the financial assessment which may result in a further reduction of their contribution.

If a person wants us to consider a further Disability Related Expenditure allowance, they must tell us within 10 days of the notification of their contribution.

All applications for an additional Disability Related Expenditure allowance require supporting evidence to be provided of costs claimed as incurred relating to disability or a long term health condition. Costs incurred simply as a matter of personal choice, or where a reasonable alternative is available at a lesser charge will not be allowed.

If a person submits an application for additional Disability Related Expenditure later than 10 days after the notification of their charging contribution, any additional Disability Related Expenditure will only be applied from the date the application and evidence was received. In the meantime, people must pay the contribution they have been asked to pay and if any waiver is applied to the contribution a refund of any overpaid charges will be made

In all cases people seeking a further disregard for Disability Related Expenditure in their financial assessment must have made a full declaration of their resources,

have been formally notified of the amount they have been asked to contribute and have had an Income Maximisation check within the previous six months to ensure all appropriate benefits/ allowances are in payment.

Where a person chooses not to undertake an Income Maximisation check and it is identified that they may be entitled to a benefit that they have not claimed, their assessment may be adjusted to take this benefit into account as though they were in receipt of it. However, advice and support will be offered to help people claim their full entitlement.

Expenses that could be considered

It is not possible to provide a comprehensive list of expenses that might be considered as these are unique to each person's particular circumstances.

The below is examples of what may be included:

- Extra heating costs above the average levels for the area and housing type
- Community alarm system
- Special dietary needs (we may ask you to let us talk to your doctor about this)
- Extra laundry costs including specialist cleaning products
- Additional costs of bedding, for example, because of incontinence
- Incontinence aids
- Day or night care to meet eligible needs which is not being funded by the Council
- Additional costs of special clothing or footwear, for example, where this needs to be specially made, or there is additional wear and tear to clothing and footwear caused by your disability
- Prescription Charges
- Chiropody
- Purchase, hire, maintenance, and repair of disability related equipment, including equipment or transport needed to enter or remain in work. This may include IT costs, where this is necessary because of your disability.
Reasonable hire costs of equipment may also be included, if due to waiting for supply of equipment from the Council
- Court of Protection Deputyship costs
- Reasonable costs of basic garden maintenance, cleaning, or domestic help, where this is necessary because of your disability and not met by the Council

In meeting needs, the most cost-effective option should usually be utilised, for example using the NHS prescription prepayment scheme

In deciding if a cost can be allowed in a person's financial assessment as Disability Related Expenditure the Council will first consider what is included in the agreed care and support plan, although allowable costs are not necessarily restricted to

what is stated in the support plan.

To be included as Disability Related Expenditure, the cost must be higher than normal household living expenses.

It is the additional cost above normal household costs that can be considered as additional expense. For example, a person may have more laundry than someone without a disability would have, say five loads per week per person rather than just two. The costs of the additional three loads could be considered as a Disability Related Expenditure.

All allowable costs will be divided by the number of adults living in the household who receive a benefit from the purchased item or service.

Exceptional circumstances will be considered on their merits.

The Council reserves the right to verify that items claimed for have been purchased, particularly for unusual or high-cost expenditure.

Appendix 3 provides guidance on specific disability expenses relating to heating costs.

Appendix 3 – Heating Allowances

Annual inflationary update based on RPI Fuel index at November 2022. At this date fuel prices had **increased** by 92% in the last 12 months.

The figures are obtained from the Consumer price inflation tables - Office for National Statistics. The figures are found in Table 41 detailed reference tables - percentage change over 12 months.

Figures for 2023/2024	Standard	N East / E Midlands	N West / W Midlands
Single person - Flat/Terrace	£2,761.73	£2,993.70	£3,344.04
Couple – Flat/Terrace	£3,643.68	£3,945.69	£4,407.21
Single person – Semi Detached	£2,933.32	£3,179.73	£3,551.87
Couples – Semi Detached	£3,872.45	£4,187.41	£4,677.83
Single – Detached	£3,568.76	£3,865.99	£4,325.05
Couples – Detached	£4,704.40	£5,097.22	£5,695.07

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Case Studies

Ref	Age	Dependent Children	Income Types	Weekly Income	Capital, if over £14,250	Current Co-funding	Option 1	Option 2	Option 3
A	20	-	UC, PIP & PIP (Mobility)	£299.49	-	£33.18	£45.92	£41.33	£36.74
B	18	-	DLA & DLA (Mobility)	£156.90	-	Nil	Nil	Nil	Nil
C	41	2	UC, PIP & PIP (Mobility)	£275.46	-	Nil	Nil	Nil	Nil
D	59	-	ESA & UC	£255.59	-	Nil	£141.44	£127.30	£113.15
E	61	-	ESA, PIP & PIP (Mobility)	£321.60	-	£51.07	£90.60	£81.54	£72.48
F	61	-	PIP & PIP (Mobility)	£156.90	-	Nil	Nil	Nil	Nil
G	82	-	Retirement Pension, AA & Occupational pension	£348.87	£42,808	£51.07	Self-Funder	Self-Funder	Self-Funder
H	93	-	Retirement Pension, AA & Occupational pension	£552.17	£22,000	£51.07	£337.92	£304.13	£270.34
I	79	-	Retirement Pension, DLA and DLA (Mobility)	£286.75	-	Nil	£7.55	£6.80	£6.04
J	76	-	Retirement Pension & Occupational Pension	£666.75	-	Nil	£498.10	£448.29	£398.48
K	71	-	Retirement Pension & AA	£277.91	£18,625	Nil	£22.12	£19.91	£17.70
L	89	-	Retirement Pension, AA & Occupational pension	£468.25	-	£51.07	£252.94	£227.65	£202.35

All the above case studies are based on a standard £20 allowance for Disability related Expenditure. However, if people feel that their DRE exceeds this amount, they can ask for a DRE review which will take into account items such as excessive utility bills, specialist dietary requirements, additional bedding, clothing, laundry etc.

In all the above cases, if the client contribution is greater than the cost of the care package, they would become self-funders.

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