

26 October 2026

CABINET – 3 NOVEMBER 2026

A meeting of Cabinet will be held at 6.00pm on Tuesday 3 November 2026 in the Council Chamber at the Town Hall, Rugby.

Members of the public may also view the meeting via the livestream available on the Council's website.

Dan Green
Chief Executive

A G E N D A PART 1 – PUBLIC BUSINESS

1. Minutes – to approve the minutes of the meeting held on 6 October 2026.
2. Apologies.
To receive apologies for absence from the meeting.
3. Declarations of Interest.
To receive declarations of –
 - (a) disclosable pecuniary interests as defined by the Council's Code of Conduct for Councillors;
 - (b) other registrable interests as defined by the Council's Code of Conduct for Councillors; and
 - (c) non-registrable interests as defined by the Council's Code of Conduct for Councillors.

Note: Councillors are reminded that they should declare the existence and nature of their interests at the commencement of the meeting (or as soon as the interest becomes apparent). If that interest is a disclosable pecuniary interest, the Councillor must withdraw from the room unless one of the exceptions applies.

4. Question Time
Notice of questions from the public should be delivered in writing or by e-mail to the Chief Executive at least three clear working days prior to the meeting (no later than Wednesday 28 October 2026).
5. Matters referred from Scrutiny Committee or Full Council.

Growth and Investment Portfolio

Nothing to report to this meeting.

Partnerships, Health and Wellbeing Portfolio

Nothing to report to this meeting.

People, Resources and Governance Portfolio

6. General Fund Outturn Report as at 31 March (Quarter 4).
7. Housing Revenue Account (HRA) report as at 31 March (Quarter 4).
8. Discretionary Rate Relief Policy.
9. Annual Review of Progress on the Equality & Diversity Strategy 2025-2028.

Communities, Housing and Safety Portfolio

10. Summer Youth Hub.

Environment and Climate Portfolio

Nothing to report to this meeting.

Customer and Digital Portfolio

Nothing to report to this meeting.

The following item contains reports which are to be considered en bloc subject to any Portfolio Holder requesting discussion of an individual report

11. Write Offs.

PART 2 – EXEMPT INFORMATION

There is no business involving exempt information to be considered.

Any additional papers for this meeting can be accessed via the website.

The Reports of Officers are attached.

Membership of Cabinet:

Councillors Robinson (Chair), C Edwards, S Edwards, McKenzie, I Mistry, O'Rourke, Pimm and Roodhouse.

CALL-IN PROCEDURES

Publication of the decisions made at this meeting will normally be within three working days of the decision. Each decision will come into force at the expiry of five working days after its publication. This does not apply to decisions made to take immediate effect. Call-in procedures are set out in detail in Standing Order 15 of Part 3c of the Constitution.

If you have any general queries with regard to this agenda please contact Claire Waleczek, Democratic and Support Services Manager (01788 533524 or e-mail claire.waleczek@rugby.gov.uk). Any specific queries concerning reports should be directed to the listed contact officer.

Agenda No 6

AGENDA MANAGEMENT SHEET

Report Title:	General Fund Outturn Report as at 31 March (Quarter 4)
Name of Committee:	Cabinet
Date of Meeting:	3 November 2026
Report Director:	Chief Financial Officer (S151 officer)
Portfolio:	Finance and Performance, Legal and Governance
Ward Relevance:	all
Prior Consultation:	Chief Financial Officer, Statutory Officers, Service Directors and Portfolio Holder
Contact Officer:	Gemma Lister, Lead Accountant, gemma.lister@rugby.gov.uk
Public or Private:	Public
Report Subject to Call-In:	Yes
Report En-Bloc:	No
Key Decision:	Yes
Corporate Priorities:	This report relates to the following priority(ies): ☐ A Healthier Rugby – To support people to live healthier, longer, and more independent lives. ☐ A Thriving Rugby – To deliver a thriving economy which brings Borough-wide investment and regenerates Rugby Town Centre. ☐ A Greener Rugby – To protect the environment and ensure the Borough adapts to climate change. ☐ A Fairer Rugby – To reduce inequalities and improve housing across the Borough. Corporate Strategy 2025-2035 ☒ This report does not specifically relate to any Council priorities but reporting financial performance is a keyway of demonstrating the success of delivering the Corporate Strategy.
Summary:	This report sets out the 2025/26 General Fund financial position for both revenue and capital as at 31 March (Quarter 4) and other adjustments for approval as required by Financial Standing Orders.

Local Government Reorganisation Implications:	None as a direct result of this report, however the medium-term financial position of Rugby Borough Council will have direct impact on the new operating model.
Financial Implications:	As detailed in the main body of the report
Risk Management/Health and Safety Implications:	This report is intended to give Cabinet an overview of the Council's General Fund outturn position for 2025/26 including all errors from prior years.
Environmental Implications:	There are no environmental implications arising from this report therefore no Climate Change and Environment Impact Assessment has been completed.
Legal Implications:	There are no legal implications arising from this report.
Equality and Diversity:	No new or existing policy or procedures have been recommended, and no equalities impact assessment is required for this report.
Options:	Members can elect to approve, amend or reject the carry forward requests and movements to reserves as listed below.
Recommendations:	(1) Cabinet acknowledges the Quarter 4 Outturn position as identified in this report, including all technical and non-recurring adjustments; and (2) Cabinet approves: (a) The carry forwards totalling £0.267m(Revenue) and £3.942m of Capital; (b) The prior year RAGM business rates reimbursement of £0.275m is transferred to the budget stability reserve; and (c) that a Direct Revenue Financing reserve is established and that £2.392m is redirected and used to contribute towards Capital and Revenue expenditure in 2026/27 to be allocated by the S151 Officer, as deemed necessary to mitigate budget pressures in key areas.
Reasons for Recommendation:	A strong financial and performance management framework, including oversight by Members and all responsible officers is an essential part of

delivering the Council's priorities and statutory duties.

Cabinet - 3 November 2026

General Fund Outturn Report as at 31 March (Quarter 4)

Public Report of the Chief Financial Officer

Recommendation

- (1) Cabinet acknowledges the Quarter 4 Outturn position as identified in this report, including all technical and non-recurring adjustments; and
- (2) Cabinet approves:
 - (a) the carry forwards totalling £0.267m(Revenue) and £3.942m of Capital;
 - (b) the prior year RAGM business rates reimbursement of £0.275m is transferred to the budget stability reserve; and
 - (c) that a Direct Revenue Financing reserve is established and that £2.392m is redirected and used to contribute towards Capital and Revenue expenditure in 2026/27 to be allocated by the S151 Officer, as deemed necessary to mitigate budget pressures in key areas.

EXECUTIVE SUMMARY

This report provides the Quarter 4 Outturn position for the General Fund and includes all supporting information to understand the errors and corrections relating to previous years.

This report has been delayed due to a backlog of invoices and other issues including the Accounts Payable function, that needed to be worked through and cleared, the full financial impact has been ascertained to ensure that all expenditure known to relate to 2025/26 is accounted for in the correct year.

Additional reviews that have been undertaken to validate and ensure that we have the correct position at the end of 2025/26.

These additional reviews have identified items that had been missed from the original draft Qtr. 4 Outturn position (not published) and identified further corrections in how provisions for bad debt were being calculated.

Additional errors were found following a further review of the interest allocations and calculations between the General Fund and the Housing Revenue Account (HRA).

The missing expenditure, impact of the additional provisions for bad debt and correcting the allocation of interest, have all been considered and are included in the updated Qtr. 4 Outturn position (a bridge analysis has been provided in Appendix A).

To ensure Cabinet can fully understand the Qtr. 4 Outturn position and to understand and consider the full and complete position this report provides additional detail regarding the errors and financial impact.

This draft Outturn position includes all items and errors that are being corrected from prior years.

These adjustments are anticipated to need to be shown differently in the final Statement of Accounts – following discussions with the External Auditors on final presentation of the 2025/26 Statement of Accounts.

The Balance Sheet at the end of 2025/26 should remain the same (subject to any other audit adjustments), with the in-year surplus being adjusted to carry back prior year impacts.

The General Fund showed a break-even position in 2025/26 against the approved General Fund budget.

A copy of the draft statement of accounts is published on the Council's website at <https://www.rugby.gov.uk/w/statement-of-accounts>.

The following appendices are attached:

- Appendix A – Bridge Analysis
- Appendix B – Capital Schemes Carried Forward From 2025/26
- Appendix C – Projection of Future Earmarked Reserves
- Appendix D – Financial Variances by Portfolio

1. BACKGROUND

- 1.1. The General Fund is the main revenue account of the local authority, which includes day-to-day income and expenditure on the provision of services. Activities within the General Fund include all services except the Housing Revenue Account (HRA).
- 1.2. The information in this report as at 31 March (quarter 4) is the final position for the year end 2025/26, prior to any audit adjustments.
- 1.3. The Outturn position has been produced before the completion of the external audit of the accounts and is subject to change.

2. OVERVIEW

2.1. Financial Summary

2.1.1. The Council has delivered a break-even position against the approved General Fund budget.

2.1.2. The table below contains a breakdown from the original draft Outturn (not published) and all the summarised changes to get to the final Outturn position for the year. Further details are available in Appendix A

Summary by Portfolio - Draft (Unpublished Position) at Qtr. 4

	£ 000's	£ 000's
Finance, Performance, Legal and Governance	826	
Communities, Homes, Regulation and Safety	(299)	
Growth, Investment, Digital and Communications	(691)	
Operations and Traded Services	324	
Partnership and Wellbeing	510	
Organisational Change	(16)	
Chief Executive	52	
Provisional Overspend on Services		707
Interest	(1,222)	
Minimum Revenue Provision	(35)	
Capital expenditure financed from revenue balances	(30)	
Corporate Strategy Delivery Fund	(1,244)	
Other Corporate Items	(149)	
Total Corporate Items		(2,680)
Council Tax	(387)	
Business Rates	(1,110)	
Grants	(147)	
Total Funding		(1,644)
Transfers to/from Reserves		100
Provisional Surplus (not Published) at end of Qtr. 4		(3,517)
<u>Identified Adjustments</u>		
Expenditure - Accounts Payable Backlog		
Un-processed Invoices (Accrued into 25/26)	683	
Un-processed Invoices (Accrued into 25/26) -Offset by S106	847	
Crematorium Transfer to Earmarked Reserves	207	
Total Value of Unprocessed invoices/missed Accruals		1,737
Grants and S106 Income to Offset Expenditure		
Un-processed Invoices (Accrued into 25/26) -Offset by S106	(847)	
Grant Drawdowns to offset accruals	(103)	
Reserve Transfers	(32)	
Late posting of income file	(8)	
Total Value of Grants and S106 - Applied Against Expenditure		(990)
Increase in Bad Debt Provision		1,519
Collection fund Bad Debt Provision - shown separately		(136)
Recalculation of Interest between General Fund and HRA		1,538
Total of all Adjustments Identified		3,668

2.2. The total of all the adjustments are reflected in the amendments from planned to actual transfers to Earmarked reserves as shown below.

<u>Planned Transfers To/(From) Reserve</u>	£ 000's	£ 000's
Planned Transfer to Business Equalisation Reserve	2,543	
Move Surplus to Direct Revenue Reserve	3,517	
Other Planned Movements to/from Earmarked Reserves	(456)	
Previously Planned Movements to Reserves		5,605
<u>Actual Movement To/(From) Reserves in 2025/26</u>		
Other Planned Movements From Earmarked Reserves	(456)	
Movement To Direct Revenue Financing Reserve (Para 13)	2,392	
		1,937
Total variation to original plan		3,668

2.3. Summary of Position

- 2.3.1. Services initially reported a net overspend of £0.707m, prior to additional adjustments, at the draft (not published) Qtr. 4 initial position.
- 2.3.2. The revised services overspend is £2.973m including the backlog of invoices in the accounts payable team, and a few technical adjustments. Detail of this overspend can be found in section 5 of the report which summarises the key categories of the variances. Further details can also be found in appendix A.
- 2.3.3. The overspend in services has been offset by £1.143m in overperformance and underspends in corporate Items and £1.780m received via additional funding (Business Rates, Council Tax and Grants), with the balance of circa £0.050m attributed to other smaller positive movements.

2.4. Planned Transfers to Earmarked Reserves

- 2.4.1. The planned transfer of an initially projected surplus of £3.517m has not been possible – as this provisional in-year surplus has been fully utilised and has covered most of the in-year additional pressures that had been identified.
- 2.4.1.1. This movement to reserves had been initially identified as a source of funds to cover the anticipated 27/28 budget gap, this is now not available for use and either savings or alternative funding will need to be found
- 2.4.2. Only £2.392m of the anticipated movement to reserves of £2.543m is available to move to a specifically Earmarked Reserve (Please refer to Para 13 for additional details).

2.5. Capital Programme

2.5.1. The capital programme for 2025/26 is £7.668m and total actual expenditure on these capital schemes has been £3.325m.

2.5.2. A total of £3.942m of ongoing capital expenditure has been identified as being required to continue with these schemes into 2026/27, this has identified a total reduction in required budget of (£0.401m), being the cumulation of schemes delivering within budget.

3. OUTTURN V BUDGET

3.1. The table below shows the summary of the outturn position against the actual budget as at the end of Qtr. 4.

3.1.1. Previous variations to services and corporate items are provided for indicative purposes.

3.1.2. Previous Quarters are shown excluding funding sources and transfers to/from reserves, as the actuals only materialise during the end of year work, whilst establishing the draft outturn position and the statement of accounts

Outturn as at 31st March 2026				Previous Variances to Outturn		
CIES Section	Revised Budget £000	Actual Outturn £000	Variance to Budget Qtr 4 £000	FOT Qtr 3 £000	FOT Qtr 2 £000	FOT Qtr 1 £000
Services	24,806	27,778	2,973	816	991	343
Corporate Items	(3,969)	(5,112)	(1,143)	(1,087)	(380)	(159)
Funding Sources	(22,823)	(24,603)	(1,780)	-	-	-
Total	(1,986)	(1,936)	50	(271)	611	184
Transfers to/from Earmarked Reserves	1,986	1,936	(50)			
Total General Fund				(271)	611	184

3.2. Additional Analysis and breakdowns are provided in sections 4, 5, 6, 7 and 8

3.2.1. Section 4 provides a breakdown of the revenue position by services, with the main elements of the corporate items also shown by category

3.2.2. Section 5 provides an overview of the nature of income and expenditure that are behind the overspent service position.

3.2.3. Section 6 provides details on the enhanced bad debt provision that has been made

3.2.4. Section 7 provides details on the enhanced bad debt provision against the collection fund

3.2.5. Section 8 provides details on the interest calculation between general fund and the HRA

4. REVENUE POSITION (APPENDIX A Bridge Analysis)

4.1. The 2025/26 year-end final revenue forecast variances against the Budget are summarised below

	£ 000's	£ 000's
Portfolio summary		
Finance, Performance, Legal and Governance	1,646	
Communities, Homes, Regulation and Safety	483	
Growth, Investment, Digital and Communications	(605)	
Operations and Traded Services	698	
Partnership and Wellbeing	708	
Organisational Change	(16)	
Chief Executive	59	
Total Portfolio Outturn Position		2,973
Interest	316	
Minimum Revenue Provision	(35)	
Capital expenditure financed from revenue balance:	(30)	
Corporate Strategy Delivery Fund	(1,244)	
Other Corporate Items	(148)	
Total Corporate Items		(1,143)
Council Tax	(387)	
Business Rates	(1,246)	
Grants	(147)	
Total Funding		(1,780)
Transfers to/from reserves		(50)
Total Net Position		()

4.2. The Council has delivered a break-even position against the approved General Fund budget.

5. SUMMARY OF KEY VARIATIONS TO BUDGET BY SERVICE

5.1. The main contributing factors to the position are shown below.

Summary - Key Categories Variances v Budget	£ 000's	
Salary variance	(2,138)	Underspend
Agency variance	2,272	Overspend
Consultancy cost variance	755	Overspend
Property expenditure variance	(164)	Underspend
Transportation expenditure variance	(63)	Underspend
General running expenditure variance	1,346	Overspend
Contractor expenditure variance	690	Overspend
Income variance	2,530	Under performance
Additional grant drawdowns	(2,497)	Over performance
Transfers to / from reserves	242	Reduced transfer
Total Variances to Budget - All Portfolio's	2,973	Overspend

5.2. Recruitment to fill permanent posts continues to be a challenge, with different factors all contributing to the issue.

5.3. Similarly, the ability to backfill some essential roles with agency staff is also proving to be a challenge for some services including finance and planning.

5.4. The table on the next page is a summary of the key contributors from each portfolio.

5.5. The overspend by service in 2025/26 also includes expenditure from 2024/25 that had not been recorded or accrued for in 2024/25.

	£ 000's	£ 000's
Finance, Performance, Legal and Governance		1,646
Staffing underspend	(688)	
Agency overspend	1,342	
Housing Benefit overspend	606	
Postage costs.	55	
Fees and charges variance Council Tax and Business Rates	202	
Others	130	
Communities and Homes, Regulation and Safety		483
Staffing underspend	(341)	
Agency overspend	282	
Underachievement of income	131	
Reserve transfer to Cremator replacement reserve	207	
Others	203	
Growth, Investment, Digital and Communications		(605)
Staffing underspend	(591)	
Agency overspend	280	
Borough Local plan overspend	92	
Additional planning income	(194)	
Underspend on town centre improvement.	(123)	
Others	(69)	
Operations and Traded Services		698
Staffing underspend	(588)	
Overtime overspend	347	
Agency overspend	280	
Consultancy spend	158	
Contractor spend for Work Service Unit	150	
Underachievement of income	85	
Others	266	
Partnership and Wellbeing		708
Staffing underspend	22	
Agency overspend	24	
Contractor overspend	181	
Underachievement of income - sports and recreation service	145	
Property expenses - Security and cleaning costs at the Benn Hall	67	
Overspends funded from the Corporate Strategy Delivery Fund	221	
Others	48	
Organisational Change		(16)
Staffing underspend	(305)	
Agency overspend	62	
Contractor overspend	76	
Transfers to/from reserves not actioned due to vacant posts	118	
Others	32	
Chief Executive		59
Additional Cost of new SLT from 1st March 2026 (1 month)	25	
LGR Advice pre decision being announced by Government.	20	
Others	14	
Total Portfolio Variance	2,973	2,973

6. BAD DEBT PROVISION

6.1. The table below shows the bad debt provision (Excluding Collection Fund Elements)

6.1.1. This table shows the original calculation and the updated calculation that takes a more prudent stance, when considering the likelihood of debt being collected.

6.1.2. The main difference between the calculation is in relation to debts that are over 2 years old

	Previous Calculation £ 000's	Updated Methodology used in 2025/26 £ 000's	Actual RBC Allowance V Recalculated version £ 000's
31/03/2026	(2,300)	(3,819)	1,519

6.2. The impact of amending the calculation and the amount provided for is a one-off catch-up amount that has hit 2025/26.

6.3. The table below shows the level of bad debt provisions previously provided for and what the amended calculation would have been, if the updated calculation would have previously been used.

	Previous Calculation £ 000's	Updated Methodology used in 2025/26 £ 000's	Actual RBC Allowance V Recalculated version £ 000's
31/03/2025	(2,242)	(3,410)	1,168
31/03/2024	(2,198)	(3,350)	1,152
31/03/2023	(2,170)	(3,228)	1,058
31/03/2022	(2,095)	(2,978)	883
31/03/2021	(2,011)	(3,020)	1,009

6.4. If the calculation had been applied in 2024/25 then the total provision would have been £3.410m an increase in provision of £409k year on year.

6.5. This under provision against the collection of outstanding debts – appears to go back to around 2020/21 when a basic error in the calculation table has been identified

7. BAD DEBT PROVISION - COLLECTION FUND – RUGBY SHARE ONLY

7.1. The table below shows the bad debt provision for the Collection Fund (Council Tax and Business Rates) – for Rugby's share only

7.1.1. This table shows the original calculation and the updated calculation that takes a more prudent stance, when considering the likelihood of debt being collected.

7.1.2. The main difference between the calculation is in relation to debts that are over 2 years old

	Previous Calculation £ 000's	Updated Methodology used in 2025/26 £ 000's	Actual RBC Allowance v Recalculated version £ 000's
31/03/2026	(241)	(1,769)	1,528

7.2. The impact of amending the calculation and the amount provided for will materialise in the 2027/28 funding received out of the collection fund – based on the calculations this will provide a one off additional financial pressure of £1.769m.

7.3. The table below shows the level of bad debt provisions previously provided for and what the amended calculation would have been, if the updated calculation would have previously been used.

	Previous Calculation £ 000's	Updated Methodology used in 2025/26 £ 000's	Actual RBC Allowance V Recalculated version £ 000's
31/03/2025	(119)	(1,570)	1,451
31/03/2024	(108)	(1,352)	1,244
31/03/2023	(150)	(1,049)	899
31/03/2022	(103)	(866)	763
31/03/2021	(158)	(603)	445

7.4. From review of the calculation a basic error seems to have occurred in the 2021 calculation and was continued for future years until it was identified in the additional checking applied to 2025/26 closedown

8. RECALCULATION OF INTEREST TO AND FROM THE HRA

8.1. During the review of 2025/26, errors have been identified in the calculation of interest charged and received between the General Fund and the HRA.

8.2. Categories of assets had been incorrectly excluded from the calculation, including the balance of the loans taken out for 2 major house building schemes that were planned/under way

8.2.1. It appeared that all the interest associated with these loans had been charged to the HRA, unfortunately the balance of the loan unused cash element had been excluded from the assets for the calculation of what interest was owed to the HRA.

8.2.2. It was also identified that the amount the HRA had been paying on the 'internally borrowed funds' had also been excluded from the calculations. This would offset partially but not completely all the money owed to the HRA

8.3. The nett amount is a total of £1.538m was calculated to be owed to the HRA, going back and covers all years that the calculation appears to be wrong, however some of the years when considered in isolation would not be

material and may not have been enough to warrant a change in the calculation or movements to and from the HRA.

- 8.4. This will be a discussion with the external auditors, however from an accounting position all entries have been accrued/provided for in the 2025/26 Qtr. 4 position and the draft statement of accounts.

9. YEAR END ACCOUNTING ADJUSTMENTS – CARRY FORWARDS

- 9.1. A year-end carry forward occurs when unspent budget allocations are transferred from one financial year into the next, typically to support ongoing projects or commitments that could not be completed within the original timeframe.

Carried Forward - Description	£ 000's
St Andrew's Church - Revenue	222
Food Waste Communication	45
Total To Be Carried Forward into 2026/27	267

- 9.2. There are two requests as part of this report.

- 9.2.1. £0.222m for ongoing cleaning and repair of the church's stonework, restoration elements around windows and stained glass, and installation of new external lighting, alongside improvements to the surrounding area to better integrate St Andrews Church building into the town centre.

- 9.2.1.1. The scheme did not complete in 2025/26 and so a carry forward is required.

- 9.2.1.2. This scheme will be funded from the Town Centre reserve the assigned draw down budget of (£0.222m) will also need to be carried forward into 2026/27.

- 9.2.1.3. The associated capital expenditure is shown separately in the capital schemes being carried forward.

- 9.2.2. £0.045m – Food waste communications plan.

- 9.2.2.1. The food waste rollout programme commenced in July 2026 the assigned communications needs to be moved into 2026/27 to align with the programme being rolled out.

- 9.2.2.2. The funding source for this needs to be confirmed as the total cost of the food waste vehicles and containers will exceed the grant received.

10. CORPORATE AND EARMARKED RESERVES

10.1. A summary of the balances held in earmarked and other key reserves are shown in the table below

10.1.1. Appendix C has further information and an indicative projection of the possible use and required drawdown of reserve balances including those as set-aside and allocated in February 2026 as part of the budget setting process

Name of reserve	Balance at 01/04/25 £000	Actual contribution (to)/from 25/26 £000	Balance at 31/03/26 £000
Gen Fund Revenue Acc	(2,250)	0	(2,250)
Business Rates Equalisation Reserve	(21,060)	(37)	(21,097)
Local Government Reform Reserve	0	0	0
Budget Stability Reserve	(2,410)	(19)	(2,429)
Town Centre Strategy Reserve	(4,603)	1,317	(3,286)
GF Carry Forward Reserve	0	(267)	(267)
Direct Revenue Financing Reserve	0	(2,392)	(2,392)
Non-Conditional Revenue Grants	(546)	202	(344)
Total Corporate Reserves	(30,868)	(1,197)	(32,065)
Community Infrastructure Levy (CIL)	(33)	(62)	(95)
Section Agreements	(1,839)	(9,046)	(10,885)
Total Section Agreements	(1,872)	(9,108)	(10,980)
Communities and Homes, Regulation and Safety	(610)	(2)	(612)
Operations and Traded Services	0	(627)	(627)
Partnerships and Wellbeing	(91)	(44)	(134.48)
Organisational Change	(1,478)	140	(1,338)
Chief Executive	(896)	302	(594)
Total Portfolio earmarked reserves	(3,074)	(230)	(3,304)
Total Reserves	(35,815)	(10,535)	(46,350)

Other Balances	Balance at 01/04/25 £000	Forecast contribution (to)/from 25/26 £000	Balance at 31/03/26 £000
Capital Receipts	(477)	457	(20)
Capital Grants Unapplied	(22)	0	(22)
Benn Hall Bequest	(6)	0	(6)
Benn Estate	(633)	11	(622)
Other contribuitions	(1,138)	468	(670)

10.2. Corporate Reserves (usable with no restrictions) have a balance of (£32.065m) at 31 March 2026 which is an increase during 25/26 of (£1.197m).

10.3. Section 106 (S106) and Community Infrastructure Levy (CIL) balances have been shown separately in the table above, as there are different requirements around the use of these reserves. These have increased by (£9.046m) in 2025/26, which is the overall movement in the balance after all new receipts and expenditure are accounted for.

10.3.1. Section 106 receipts have been received for the Frasers Campus, an obligation of £9,975,000 (index-linked) to provide employment and training measures in relation to the Frasers Group Campus development.

10.3.1.1. Specifically, this is for up to £1,175,000 (index linked) to deliver the training and innovation focused hub in Rugby Town Centre and up to £8,800,000 (indexed linked) for services to promote training and skills at the training and innovation focused hub. This obligation was required to be paid to the Council prior to a 'material start' on site.

10.4. Due to a successful appeal against the assessed business rates valuations for Rugby Art Gallery and Museum (RAGM) the Council received a reimbursement of £0.275m for prior year costs incurred.

10.4.1. Previous years the cost of paying the business rates has been met from the Budget Stability reserve, therefore it is recommended that the reimbursement is transferred back into the reserve and used towards budget volatility or pressures in 2026/27.

11. CAPITAL EXPENDITURE

11.1. A summary of the capital budget, expenditure and carry forward requests are contained in the table below: -

	Budget 2025/26 £000	Expenditure in year £000	Carried Forward to 2026/27 £000	Variance to Budget £000
Capital	7,668	3,325	(3,942)	(401)

11.2. The approved capital programme for 2025/26 is £7.668m and total actual expenditure on these capital schemes has been £3.325m.

11.3. A total of £3.942m of ongoing capital expenditure has been identified as being required to continue with these schemes into 2026/27.

11.4. The review of what is needed to be carried forward and the completion of some of the capital projects has identified a reduction in anticipated requirements totalling (£0.401m).

Reductions in Capital Requirement include: -

- £180k relating to cost of the food waste vehicles coming in less than originally budgeted for, however the original budget was more than the actual grant received
- £137k reduction in public realm enhancements
- £21k of unused budget for waste caddies and bins, as a new amount totalling £88k is included in the 2026/27 capital budget
- £18k as the costs of the financial management system upgrade, was less than budgeted
- £45k of other minor reductions are also no longer needed and not being carried forward for ongoing schemes

11.5. Appendix B, contains a detailed breakdown on a per scheme basis of the amount of capital being requested to be carried forward into 2026/27

12. CAPITAL FINANCING

12.1. During the year end process a review of all capital receipts and expenditure is undertaken, and the most advantageous use of Grants and Capital Receipts is applied as part of the allocation and use of Capital Financing.

12.2. The table below summarises the use and allocation of resources against the Capital expenditure incurred in 2025/26.

	DRF Capital Reserve	Borrowing	s106	Government & Other Grants and contributions	Capital Receipts	Grand Total
	£000	£000	£000	£000	£000	£000
Grand total	100	1,352	397	1,020	456	3,325

12.3. To clarify a total of £1.352m referred to as borrowing, is internal borrowing from our own resources (cash balances available to use by the Council).

12.4. A charge will be applied to future years revenue accounts called a 'Minimum Revenue Provision (MRP) charge' – this is a charge that pays the internal borrowing back over the life of the asset that was created/acquired.

12.5. The MRP charge is only one element of the overall cost of using internally borrowed funds, the other element is the interest forgone on the amount used for Capital. This Interest lost does not visually materialise as a separate line in the accounts it is seen as a reduction in the actual interest received had the funds not been used to acquire these capital items.

13. EXPLANATION OF PROPOSED DIRECT REVENUE FINANCING RESERVE

13.1. That a Direct Revenue Financing reserve is established and that £2.392m is redirected to this reserve for use in 2026/27 at the discretion of the Section 151 Officer, as deemed necessary for the following: -

- To cover any adjustments as identified by the external Auditors in the audit of 2025/26 Statement of Accounts
- To cover any overspends that may have been incurred by services, due to the issues within Accounts Payable, as deemed appropriate
- To cover small capital requests that individually or collectively do not exceed a total of £0.500m in 2026/27 without the requirement for any additional or separate reports to be presented.
- To allow the S151 Officer (at his discretion) to utilise any remaining funds as direct revenue contributions towards capital expenditure, to mitigate future years MRP charges, if the S151 Officer deems appropriate.
- Any un-used amount to be carried forward for use at the S151 Officer's discretion

Appendices

Appendix A – Bridge Analysis (showing all the changes between draft Qtr. 4 (not published) and the final Qtr. 4 position)

Appendix B – Capital Schemes Carried Forward From 2025/26

Appendix C – Projection of Future Earmarked Reserves

Appendix D – Financial Variances by Portfolio

Appendix A – Bridge Set out

				Movements											Original Outturn variance		
	Outturn position prior to Accounts Payable catching up on the payment of invoices	Transfer surplus to Direct Revenue Financing Reserve	Outturn after surplus transferred to DRF reserve							Aborted Movement to Reserves							
	£	£	£	Accruals	Bad Debt Provision	Interest adjustment	Late posting of income file	Grant Drawdowns to offset accruals	Reserve transfers	£	Total movement	2025/26 Revised Outturn	2025/26 Current Budget	Pending Carry forward requests		Pending reserve transfers	2025/26 Outturn Variance
Portfolio				£	£	£	£	£	£	£	£	£	£	£	£	£	
Finance, Performance, Legal and Governance	5,492,550		5,492,550	57,039	763,208						820,247	6,312,797	4,666,434			1,646,363	826,116
Communities, Homes, Regulation and Safety	5,121,401		5,121,401	304,330	375,179		(1,426)	(102,980)	207,000		782,103	5,903,504	5,420,656			482,848	(299,255)
Growth, Investment, Digital and Communications	4,774,746		4,774,746	105,922	16,279		(4,364)		(32,391)		85,446	4,860,192	5,465,511	222,000		(605,319)	(690,765)
Operations and Traded Services	4,732,514		4,732,514	113,918	259,821		(518)				373,221	5,105,735	4,408,108	45,000		697,627	324,406
Partnership and Wellbeing	4,659,988		4,659,988	95,135	104,970		(2,173)				197,932	4,857,920	4,149,810		275,000	708,110	510,178
Organisational Change	343,922		343,922	731							731	344,653	360,280			(15,627)	(16,358)
Chief Executive	387,157		387,157	6,353							6,353	393,510	334,870			58,640	52,287
Total Portfolios	25,512,278	-	25,512,278	683,427	1,519,456	-	(8,480)	(102,980)	174,609	-	2,266,033	27,778,311	24,805,669	267,000	275,000	2,972,642	706,609
Corporate Items																	
Interest Payable	1,589,977		1,589,977								-	1,589,977	513,810			1,076,167	1,076,167
Interest Receivable	(4,151,643)		(4,151,643)								-	(4,151,643)	(1,619,750)			(2,531,893)	(2,531,893)
Net Interest transfers to the Housing Revenue Account (HRA)	233,536		233,536			1,537,991					1,537,991	1,771,527	-			1,771,527	233,536
Minimum Revenue Provision	1,354,220		1,354,220								-	1,354,220	1,389,150			(34,930)	(34,930)
Capital expenditure financed from revenue balances	57,198		57,198								-	57,198	87,500			(30,302)	(30,302)
Corporate Strategy/Delivery Fund	-		-								-	-	1,243,936			(1,243,936)	(1,243,936)
Recharges to the Housing Revenue Account (HRA)	(3,198,930)		(3,198,930)								-	(3,198,930)	(3,198,930)			-	-
Other Corporate Items	(2,533,634)		(2,533,634)			230					230	(2,533,403)	(2,384,915)			(148,488)	(148,719)
Total Corporate Items	(6,649,275)	-	(6,649,275)	-	-	1,538,221	-	-	-	-	1,538,221	(5,111,054)	(3,969,199)	-	-	(1,141,855)	(2,680,076)
Total Net Expenditure	18,863,003	-	18,863,003	683,427	1,519,456	1,538,221	(8,480)	(102,980)	174,609	-	3,804,254	22,667,257	20,836,470	267,000	275,000	1,830,787	(1,973,467)
Funding																	
Council Tax	(10,533,232)		(10,533,232)								-	(10,533,232)	(10,146,070)			(387,162)	(387,162)
Business Rates	(11,692,811)		(11,692,811)		(136,186)						(136,186)	(11,828,997)	(10,582,660)			(1,246,337)	(1,110,151)
Grants	(2,240,690)		(2,240,690)									(2,240,690)	(2,093,810)			(146,880)	(146,880)
Total Funding	(24,466,733)		(24,466,733)	-	(136,186)	-	-	-	-	-	(136,186)	(24,602,919)	(22,822,540)	-	-	(1,780,379)	(1,644,193)
	(5,603,729)	-	(5,603,729)	683,427	1,383,270	1,538,221	(8,480)	(102,980)	174,609	-	3,668,068	(1,935,661)	(1,986,070)	267,000	275,000	50,409	(3,617,659)
Transfers to / from reserves																	
Budget Stability Reserve	(141,040)		(141,040)								-	(141,040)	(141,040)		(275,000)	-	-
Business Rates Equalisation Reserve	2,543,000		2,543,000							(2,543,000)	(2,543,000)	-	2,543,000			(2,543,000)	-
Direct Revenue Financing Reserve	-		-							2,392,207	2,392,207	2,392,207				2,392,207	-
General Fund Carry Forward Reserve	-		-								-	-	-	(267,000)		-	-
Original Anticipated Surplus	-	3,517,275	3,517,275						(3,517,275)		(3,517,275)	-	-			-	-
Town Centre Regeneration Reserve	(222,000)		(222,000)								-	(222,000)	(222,000)			-	-
Transformation Reserve	(28,002)		(28,002)								-	(28,002)	(75,000)			46,998	46,998
Other Earmarked Reserves	(65,504)		(64,614)								-	(65,504)	(118,890)			53,386	53,386
Total Transfers to/from reserves	2,086,454	3,517,275	5,604,619	-	-	-	-	-	(3,517,275)	(150,793)	(3,668,068)	1,935,661	1,986,070	(267,000)	(275,000)	(50,409)	100,384
Total net position	(3,517,275)	3,517,275	890	683,427	1,383,270	1,538,221	(8,480)	(102,980)	(3,342,666)	(150,793)			-	-	-		(3,517,275)
Total net position	(3,517,275)	3,517,275	890	683,427	1,383,270	1,538,221	(8,480)	(102,980)	(3,342,666)	(150,793)			-	-	-		(3,517,275)

Appendix B– Capital Schemes – Carried Forward from 2025/26

Capital schemes carried forward from previous agreed budgets into 2026/27	Balance Carried Forward to 2026/27
Description	£ 000'
<i>Finance, Performance, Legal & Governance</i>	
Income Management System	30
Invoice Scanning	20
Financial Management System Upgrade	12
<i>Communities, Homes, Regulation and Safety</i>	
Great Central Walk Bridge	31
Rainsbrook Cemetery preparation	138
Fire Safety Works	58
Memorial Safety	57
<i>Growth and Investment, Digital and Communications</i>	
ICT Renewal Programme	64
ICT refresh programme - Infrastructure	42
Digitalisation and Development Programme	26
Town Centre Strategy (Capital)- St Andrews Church	69
Town Centre Strategy (Capital) -Public Realm Enhancements	96
Direct Debit Digitalisation	28
Artificial Intelligence Pilot Project	80
Civica Cloud Migration	15
<i>Operations and Traded Services</i>	
Street Furniture	42
Food Waste Caddies & Bins	117
WSU Depot Yard Re-Configuration	193
Purchase of Vehicles	332
Food Waste Vehicles	1,085
<i>Partnerships and Wellbeing</i>	
Open Spaces Refurbishment - Safety Improvements	68
Park Connector Network	70
New Bilton Recreation Ground Refurbishment	140
Open Spaces Refurbishment - Charwelton Drive	139
Alwyn Road Changing Rooms	312
Alwyn Road Sports Pitches refurbishment	71
Open spaces refurbishment - Bawnmore rd play area	148
Betony Road Play Area	90
Cawston Green Gym	44
Frobisher Road	150
Centenary Park Allotments Newbold	174
Total of all schemes carried forward into 26/27	3,942

Appendix C – Projection of Future Earmarked Reserves and usage

- This is a projection of possible draw down from reserves – for indicative purposes only
- Further work is required to confirm and verify more accurately exactly what drawdowns from reserves in 2026/27 and beyond will be required

Name of reserve	Balance at 01/04/25	Actual contribution (to)/from 25/26	Balance at 31/03/26	Forecast contribution (to)/from 26/27	Anticipated Usage in 26/27	Balance at 31/03/27	Anticipated Usage in 27/28	Anticipated transfer between reserves in 27/28	Balance at 31/03/28	Anticipated transfer between reserves in 28/29	Balance at 31/03/29	Anticipated transfer between reserves in 29/30	Balance at 31/03/30
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
Gen Fund Revenue Acc	(2,250)	0	(2,250)	0		(2,250)			(2,250)		(2,250)		(2,250)
Business Rates Equalisation Reserve	(21,060)	(37)	(21,097)	10,000	1,000	(10,097)	4,600	(3,000)	(8,497)	2,500	(5,997)	5,400	(597)
Local Government Reform Reserve	0	0	0	(2,000)	1,000	(1,000)	1,000		0		0		0
Budget Stability Reserve	(2,410)	(19)	(2,429)	0	929	(1,500)	1,500		(0)		(0)		(0)
Town Centre Strategy Reserve	(4,603)	1,317	(3,286)	(3,180)	1,140	(5,326)	600	3,000	(1,726)	600	(1,126)	600	(526)
GF Carry Forward Reserve	0	(267)	(267)	267		0			0		0		0
Direct Revenue Financing Reserve	0	(2,392)	(2,392)	2,392					0		0		0
Non-Conditional Revenue Grants	(546)	202	(344)	344		0			0		0		0
Total Corporate Reserves	(30,868)	(1,197)	(32,065)	7,823	4,069	(20,174)	7,700		(12,474)	3,100	(9,374)		(3,374)
Community Infrastructure Levy (CIL)	(33)	(62)	(95)	0		(95)			(95)		(95)		(95)
Section Agreements	(1,839)	(9,046)	(10,885)	1,175	1,000	(8,710)	800		(7,910)	800	(7,110)	800	(6,310)
Total Section Agreements	(1,872)	(9,108)	(10,980)	1,175	1,000	(8,805)	800		(8,005)	800	(7,205)		(6,405)
Communities and Homes, Regulation and Safety	(610)	(2)	(612)	247		(365)			(365)		(365)		(390)
Operations and Traded Services	0	(627)	(627)	627		0			0		0		0
Partnerships and Wellbeing	(91)	(44)	(134.48)	134		(0)			(0)		(0)		(6)
Organisational Change	(1,478)	140	(1,338)	802	397	(139)	139		0		0		0
Chief Executive	(896)	302	(594)	(200)	400	(394)	200		(194)	194	0		0
Total Portfolio earmarked reserves	(3,074)	(230)	(3,304)	1,610	797	(898)	339		(559)	194	(365)		(396)
Total Reserves	(35,815)	(10,535)	(46,350)	10,608	5,866	(29,876)	8,839		(21,037)	4,094	(16,943)		(10,174)
Other Balances	Balance at 01/04/25	Forecast contribution (to)/from 25/26	Balance at 31/03/26	Forecast contribution (to)/from 26/27		Balance at 31/03/27			Balance at 31/03/28		Balance at 31/03/29		Balance at 31/03/29
	£000	£000	£000	£000		£000			£000		£000		£000
Capital Receipts	(477)	457	(20)	20		0			0		0		0
Capital Grants Unapplied	(22)	0	(22)	0		(22)			0		0		0
Benn Hall Bequest	(6)	0	(6)	0		(6)			0		0		0
Benn Estate	(633)	11	(622)	0		(622)			0		0		0
Other contributions	(1,138)	468	(670)	20		(650)			0		0		0

Appendix D – Financial Variances by Portfolio - Finance, Performance, Legal and Governance

Portfolio breakdown	Revised Budget	Outturn 2025/26	Outturn Variance
	£	£	£
Finance and Performance			
Chief Officer for Finance and Performance	132,490	128,255	(4,235)
Financial Services	1,379,100	1,674,924	295,824
Revenues and Benefits	655,134	1,332,779	677,645
Corporate Assurance	317,950	243,081	(74,869)
Housing Benefits	61,590	673,277	611,687
Retired Employees	443,560	457,812	14,252
Total Finance and Performance	2,989,824	4,510,128	1,520,304
Legal and Governance			
Civic Responsibilities	8,970	5,589	(3,381)
Business Support Services	221,200	188,243	(32,957)
Central Business Support Services	38,200	38,668	468
Management Support Services	94,210	76,724	(17,486)
Democratic Services	256,990	233,626	(23,364)
Legal Services	287,820	453,863	166,043
Borough Elections	-	21,867	21,867
Parliamentary Elections	-	5,067	5,067
County Elections	-	2,217	2,217
Police & Crime Commissioner Elections	-	2,338	2,338
By-Elections	-	10,717	10,717
Electoral Registration	204,110	220,734	16,624
Mayoral Services	17,700	20,188	2,488
Members Expenses	428,310	433,984	5,674
Co-optee members of committees	8,120	5,695	(2,425)
Chief Officer for Legal and Governance	110,980	83,149	(27,831)
Total Legal and Governance	126,059	126,059	126,059
Total Finance, Performance, Legal and Governance	3,115,883	4,636,187	1,646,363

Salary Variance	Agency Variance	Consultancy Cost Variance	Property Expenditure Variance	Transportation Expenditure Variance	General Running Expenditure Variance	Contractor Expenditure Variance	Fees and Charges Income Variance	Additional Grant drawdowns	Transfers to / from reserves
£	£	£	£	£	£	£	£	£	£
-	-	15,000	-	(603)	(18,630)	-	-	-	-
(343,068)	575,380	31,740	24	(1,114)	35,450	175	(500)	-	(2,273)
(688)	344,277	11,250	-	(205)	251,934	528	70,549	-	-
(102,510)	19,714	13,635	-	(393)	(5,315)	-	-	-	-
-	-	-	-	-	(1,687,721)	-	2,419,875	(120,467)	-
-	-	-	-	-	14,252	-	-	-	-
(446,256)	939,371	71,625	24	(2,314)	(1,410,030)	703	2,489,924	(120,467)	(2,273)
-	-	-	-	-	(3,381)	-	-	-	-
(32,063)	-	-	-	-	(894)	-	-	-	-
-	-	-	-	-	468	-	-	-	-
(17,697)	-	-	-	-	211	-	-	-	-
(27,152)	-	(31)	-	(100)	3,919	-	-	-	-
(185,085)	402,968	-	-	(1,293)	8,812	41	(58,400)	-	-
-	-	-	505	-	21,362	-	-	-	-
-	-	-	1,593	-	3,475	-	-	-	-
-	-	-	17,611	2,044	184,836	-	(202,274)	-	-
-	-	-	-	137	217	-	42,975	(40,992)	-
-	-	-	-	-	10,717	-	-	-	-
3,004	-	-	-	-	4,345	-	(569)	(32,547)	42,390
4,861	-	-	-	(1,048)	(1,325)	-	-	-	-
23,275	-	-	-	(287)	(17,314)	-	-	-	-
-	-	-	-	25	(2,450)	-	-	-	-
(30,288)	-	-	-	91	2,366	-	-	-	-
(261,145)	402,968	(31)	19,709	(431)	215,364	41	(219,267)	(73,539)	42,390
(707,401)	1,342,339	71,594	19,733	(2,745)	(1,194,666)	744	2,270,656	(194,006)	40,117

Appendix D – Financial Variances by Portfolio - Communities and Homes, Regulation and Safety

Portfolio breakdown	Revised Budget	Outturn 2025/26	Outturn Variance
	£	£	£
Communities and Homes			
Community Advice & Support Team	832,016	778,911	(53,105)
CAST - Bed & Breakfast	94,430	45,631	(48,799)
CAST - HRA Property Rental	11,700	(2,632)	(14,332)
CAST - Private Sector Leasing	80,280	(11,862)	(92,142)
Homelessness Prevention	-	18,196	18,196
Nightly Paid Self Contained Accommodation	(6,000)	20,226	26,226
SWEP - Severe Weather Emergency Protocol	-	5,085	5,085
Rough Sleeper Initiative	27,420	(2,476)	(29,896)
Homelessness Social Enterprise (funded by WCC)	-	21,000	21,000
Next Steps Accommodation Project	2,860	(18,282)	(21,142)
Asylum Seeker Support	-	-	-
CL Grants	163,030	196,463	33,433
Corporate Property Administration	257,980	267,196	9,216
Corporate Property R&M	894,420	857,245	(37,175)
Corporate Property Central Utilities	471,830	549,192	77,362
Housing Property Maintenance Team	(10)	55,090	55,100
Corporate Property Management	25,180	29,826	4,646
The Handyperson Service	-	(28,015)	(28,015)
House Purchase and Improvement Loans	(1,890)	(737)	1,153
HEART - Home Environment Assessment Response Team	4,110	(29,540)	(33,650)
Housing Strategy & Enabling	318,720	313,513	(5,207)
Welfare Services	(85,090)	(1,829)	83,261
Town Hall	244,110	291,521	47,411
Town Centre Public Conveniences	46,180	58,839	12,659
Woodside Park	139,710	270,146	130,436
Chief Officer for Communities & Homes	104,550	99,012	(5,538)
Total Communities and Homes	3,625,536	3,781,720	156,184
Regulation and Safety			
Crime and Disorder Activities	143,060	100,420	(42,640)
Cemeteries General	104,580	90,164	(14,416)
Car Parks General	(112,340)	(145,242)	(32,902)
Clock Towers Maintenance	(20,000)	-	20,000
Crematorium	(235,940)	40,973	276,913
Safety and Resilience	280,000	259,214	(20,786)
Hackney Carriages	(94,930)	(32,225)	62,705
Private Hire Vehicles	-	(12,177)	(12,177)
Hackney Carriages and Private Hire Vehicles	-	(280)	(280)
Licensing	130,990	136,569	5,579
Regulatory Services	1,199,300	1,252,474	53,174
Environmental Protection FPNs	3,950	6,545	2,595
Town Centre CCTV and Management	294,030	322,143	28,113
Chief Officer for Regulation & Safety	102,420	103,207	787
Total Regulation and Safety	1,795,120	2,121,784	326,664
Total Communities and Homes, Regulation and Safety	5,420,656	5,903,504	482,848

Salary Variance	Agency Variance	Consultancy Cost Variance	Property Expenditure Variance	Transportation Expenditure Variance	General Running Expenditure Variance	Contractor Expenditure Variance	Fees and Charges Income Variance	Additional Grant drawdowns	Transfers to/ from reserves
£	£	£	£	£	£	£	£	£	£
(93,145)	121,760	600	(6,133)	(113)	(55,672)	100	19,560	(40,062)	-
-	-	-	40,728	(500)	(1,000)	1,650	13,303	(102,980)	-
-	-	-	(192,425)	-	60	-	178,033	-	-
(5,022)	90,684	-	(65,189)	659	4,679	-	217,047	(335,000)	-
-	-	-	40,367	395	24,605	-	64,677	(111,849)	-
-	-	-	20,226	-	-	-	6,000	-	-
-	-	-	4,957	61	67	-	-	-	-
(22,561)	-	-	8,037	(3,487)	(6,884)	-	133,000	(138,000)	-
-	-	-	5,580	-	15,420	-	-	-	-
(19,690)	-	-	-	200	5,394	-	-	(7,045)	-
-	-	-	-	-	319,650	-	-	(319,650)	-
-	-	-	-	-	30,089	(4,600)	2,944	-	5,000
(242)	-	-	5,000	544	(26,022)	500	4,235	-	25,200
-	-	-	(7,459)	-	1,443	6,184	(37,343)	-	-
-	-	-	18,318	-	-	-	59,044	-	-
(14,354)	-	-	-	(1,413)	(1,793)	-	33,280	-	39,380
-	-	1,950	-	-	612	1,050	1,034	-	-
-	-	-	(38,103)	-	-	-	10,088	-	-
-	-	-	-	-	1,441	-	(288)	-	-
349	-	-	-	241	(5,497)	-	(28,742)	-	-
(253)	-	-	73	(350)	(176)	(5,000)	500	-	-
-	-	-	-	-	14,560	-	68,701	-	-
-	-	-	41,371	-	19,788	2,318	-	-	(16,065)
-	-	-	11,412	-	(4)	-	1,250	-	-
-	-	-	7,871	-	216,897	(1,719)	(73,683)	-	(18,930)
(7,605)	-	-	146	(826)	2,746	-	-	-	-
(162,523)	212,444	2,550	(105,221)	(4,590)	560,403	483	672,640	(1,054,586)	34,585
(40,576)	-	-	-	(50)	6,927	-	-	(8,942)	-
(4,045)	2,612	-	4,697	(302)	174	(13,180)	(4,371)	-	-
-	-	-	(10,309)	(1,681)	(28,401)	48,499	(41,011)	-	-
-	-	-	-	-	-	-	20,000	-	-
(15,082)	-	-	(17,667)	(2,194)	159,989	(2,946)	(51,716)	-	206,530
(21,859)	2,083	-	3	31	(1,044)	-	-	-	-
-	-	-	-	-	2,278	-	61,920	-	(1,493)
-	-	-	-	-	-	-	(13,190)	-	1,013
-	-	-	-	-	-	-	(280)	-	-
(45,805)	-	-	-	76	56,724	-	(5,416)	-	-
(51,445)	65,288	-	2	3,336	30,850	7,675	3,654	-	(6,187)
-	-	-	-	425	15,910	-	(350)	-	(13,390)
-	-	-	-	-	28,113	-	-	-	-
696	-	-	-	-	91	-	-	-	-
(178,116)	69,983	-	(23,274)	(360)	271,612	40,048	(30,760)	(8,942)	186,472
(340,639)	282,427	2,550	(128,495)	(4,950)	832,015	40,531	641,880	(1,063,527)	221,057

Appendix D – Financial Variances by Portfolio - Growth and Investment, Digital and Communications

Portfolio breakdown	Revised Budget	Outturn 2025/26	Outturn Variance
	£	£	£
Growth and Investment			
Building Control Services	120,000	93,165	(26,835)
Development Strategy	513,510	527,757	14,247
Economic Development & Town Centre	213,770	187,243	(26,527)
Land Charges	62,360	33,659	(28,701)
Planning General/Income	(508,550)	(672,884)	(164,334)
Town Centre Improvements	150,000	27,450	(122,550)
Major Projects	268,620	208,759	(59,861)
Town Centre Strategy - Creative & Marketing	-	-	-
Town Centre Strategy - The Stitch	-	-	-
Town Centre Strategy - Town Centre Delivery Plan	-	-	-
Town Centre Strategy- Car Parking Strategy	-	-	-
Town Centre Strategy- Rugby Central	-	-	-
Town Centre Strategy- Brotherhood House	-	-	-
Town Centre Strategy- Outdoor Market	-	-	-
Town Centre Strategy- St Andrews Church	222,000	222,000	-
Town Centre Strategy- Eyesore buildings	-	-	-
Town Centre Strategy- Communications Strategy	-	-	-
Town Centre Strategy- High Street Rental Auctions	-	-	-
Chief Officer for Growth & Investment	103,880	95,914	(7,966)
Total Growth and Investment	1,145,590	723,063	(422,527)
Digital and Communications			
Communications, Consultation and Information Team	350,040	280,866	(69,174)
ITC & Support Services	1,727,756	1,768,265	40,509
Maintenance of Customer Services Systems	1,198,990	1,132,926	(66,064)
Customer Support Services	730,871	631,953	(98,918)
Apprenticeship Scheme	670	(500)	(1,170)
Data Insights & Automation	91,064	33,356	(57,708)
Broadband & internet	67,670	96,091	28,421
Landlines, faxes, alarms & misc.	26,940	27,344	404
Mobile telephones	23,500	35,581	12,081
Chief Officer for Digital & Communications	102,420	131,246	28,826
Total Digital and Communications	4,319,921	4,137,129	(182,792)
Total Growth and Investment, Digital and Communications	5,465,511	4,860,192	(605,319)

Salary Variance	Agency Variance	Consultancy Cost Variance	Property Expenditure Variance	Transportation Expenditure Variance	General Running Expenditure Variance	Contractor Expenditure Variance	Fees and Charges Income Variance	Additional Grant drawdowns	Transfers to/ from reserves
£	£	£	£	£	£	£	£	£	£
-	-	-	-	-	(26,835)	-	-	-	-
(104,480)	15,307	43,757	-	(100)	302,803	-	650	(243,691)	-
(15,286)	8,890	750	-	65	(10,489)	3,000	783	-	(14,240)
(16,390)	-	20,253	-	34	(43,518)	-	10,919	-	-
(174,032)	227,572	(26,379)	-	(30)	33,033	-	(194,337)	(30,160)	-
-	-	4,500	-	-	(141,650)	14,600	-	-	-
20,017	-	-	(2)	159	54,111	-	(126,472)	(11,485)	3,811
-	-	-	-	-	48,225	-	-	-	(48,225)
-	-	-	-	-	506,163	-	-	(272,199)	(233,964)
-	-	-	-	-	59,178	-	-	-	(59,178)
-	-	24,635	-	-	-	46,405	-	-	(71,040)
-	-	297,737	-	-	58,429	-	-	-	(356,166)
-	-	9,000	-	-	-	-	-	-	(9,000)
-	-	-	-	-	43,382	-	-	-	(43,382)
-	-	-	-	-	(222,000)	-	-	-	222,000
-	-	-	-	-	3,128	-	-	-	(3,128)
-	-	21,580	-	-	-	-	-	-	(21,580)
-	-	-	-	-	-	5,700	-	-	(5,700)
(7,605)	-	-	-	(720)	359	-	-	-	-
(297,776)	251,769	395,833	(2)	(592)	664,318	69,705	(308,456)	(557,534)	(639,792)
(46,400)	-	-	-	(446)	(21,828)	-	(500)	-	-
(67,486)	-	34,449	(665)	(2,780)	79,485	-	(2,495)	-	-
-	-	-	-	-	(66,064)	-	-	-	-
(98,125)	-	-	-	(250)	(593)	50	-	-	-
-	-	-	-	-	(670)	-	(500)	-	-
(81,862)	28,002	(75,000)	-	-	71,152	-	-	-	-
-	-	-	-	-	28,421	-	-	-	-
-	-	-	-	-	(5,056)	-	-	-	5,460
-	-	-	-	-	12,081	-	-	-	-
696	-	22,880	-	264	4,986	-	-	-	-
(293,177)	28,002	(17,671)	(665)	(3,212)	101,915	50	(3,495)	-	5,460
(590,953)	279,771	378,163	(667)	(3,804)	766,233	69,755	(311,951)	(557,534)	(634,332)

Appendix D – Financial Variances by Portfolio - Partnerships and Wellbeing

Portfolio breakdown	Revised Budget	Outturn 2025/26	Outturn Variance
	£	£	£
Legal and Governance			
Equality and Diversity	41,920	57,807	15,887
Total Legal and Governance	41,920	57,807	15,887
Chief Executive			
Human Resources	658,220	666,182	7,962
Human Resources Centralised Services	154,260	283,897	129,637
Total Chief Executive	812,480	950,079	137,599
Leisure and Wellbeing			
Art Gallery and Museum	512,860	537,842	24,982
AGM Conservation/Documentation	20,100	20,404	304
AGM Exhibitions/Outreach	15,150	75,515	60,365
AGM Education	3,670	2,410	(1,260)
Art Development	8,620	22,470	13,850
RAGM 25th Birthday	-	27,382	27,382
The Benn Hall	92,010	146,967	54,957
Sports and Recreation	61,990	76,672	14,682
On Track	68,690	83,524	14,834
Sports Development	32,310	54,551	22,241
Play Projects (revenue)	29,880	85,652	55,772
Family Lifestyle Project	-	189	189
On Track - Other Grant	-	(178)	(178)
Parks	1,834,910	1,890,346	55,436
Britain In Bloom	43,450	60,509	17,059
Grass Cutting- Parishes	58,520	59,073	553
Grass Cutting- Town area	207,180	207,180	-
Section 106 Grounds Maintenance	-	13,764	13,764
Parks and Public Realm	9,010	(990)	(10,000)
Queens Diamond Jubilee Centre	(35,250)	(59,512)	(24,262)
Rugby World Cup 25		228	228
Love Rugby Festival		100,342	100,342
Town Centre Events	103,270	99,175	(4,095)
Bicentenary of the Game of Rugby	-	655	655
Town Centre Regeneration	-	2,675	2,675
Visitor Centre	193,620	192,622	(998)
Chief Officer for Leisure & Wellbeing	35,420	150,566	115,146
Total Leisure and Wellbeing	3,295,410	3,850,034	554,624
Total Partnership and Wellbeing	4,149,810	4,857,920	708,110

Salary Variance	Agency Variance	Consultancy Cost Variance	Property Expenditure Variance	Transportation Expenditure Variance	General Running Expenditure Variance	Contractor Expenditure Variance	Fees and Charges Income Variance	Additional Grant drawdowns	Transfers to/ from reserves
£	£	£	£	£	£	£	£	£	£
19,172	-	(1,400)	-	-	(1,885)	-	-	-	-
19,172	-	(1,400)	-	-	(1,885)	-	-	-	-
(56,510)	-	(400)	-	(104)	37,502	-	-	-	27,474
-	24,367	40,608	-	42	65,895	-	(1,275)	-	-
(56,510)	24,367	40,208	-	(63)	103,397	-	(1,275)	-	27,474
33,095	-	22,100	(276,348)	(400)	19,081	30,120	(26,568)	(24,998)	248,901
1,438	-	-	(163)	14	(826)	577	(736)	-	-
3,025	-	-	-	218	(2,787)	75,765	(11,550)	(4,307)	-
4,628	-	-	-	-	(7,102)	6,775	(5,561)	-	-
4,709	-	-	-	1	(6,538)	15,378	300	-	-
8,842	-	-	-	-	1,840	16,701	-	-	-
26,516	-	-	66,679	-	25,140	2,273	(65,650)	-	-
(11,999)	-	-	-	(50)	29,481	-	(2,750)	-	-
(45,633)	-	-	-	1,947	(1,193)	100	105,948	(46,334)	-
542	-	-	-	-	402	-	21,297	-	-
2,384	-	-	-	269	4,995	100	52,069	-	(4,045)
-	-	-	-	2,356	47,975	-	11,890	-	(62,031)
-	-	-	-	-	-	-	-	(178)	-
15,642	-	316	22,945	9,600	38,753	(3,624)	(25,317)	-	(2,879)
-	-	-	10,110	-	10,354	(3,510)	105	-	-
-	-	-	-	-	-	553	-	-	-
-	-	-	-	-	-	-	-	-	-
-	-	-	(50)	-	10	87,411	(70,922)	-	(2,685)
-	-	-	-	-	-	(10,000)	-	-	-
-	-	-	13,803	-	21,153	26,306	(166,524)	-	81,000
-	-	-	775	-	15,798	13,948	-	-	(30,294)
(22,452)	-	-	-	-	108,778	14,015	-	-	-
-	-	-	27,139	76	(31,406)	96	-	-	-
-	-	-	-	-	655	-	-	-	-
8,116	-	-	47,486	-	26,246	114,166	-	-	(193,338)
633	-	-	-	-	(13,225)	150	11,444	-	-
29,486	-	-	8,955	1,067	61,459	14,980	-	-	(800)
58,972	-	22,416	(78,670)	15,098	349,042	402,279	(172,524)	(75,817)	33,829
21,634	24,367	61,224	(78,670)	15,035	450,555	402,279	(173,799)	(75,817)	61,303

Appendix D – Financial Variances by Portfolio - Operations and Traded Services

Portfolio breakdown	Revised Budget	Outturn 2025/26	Outturn Variance
	£	£	£
Operations and Traded Services			
Street Furniture	252,580	202,721	(49,859)
Highways	(94,030)	125,353	219,383
Land Drainage General	1,000	2,698	1,698
Grounds Maintenance	(131,892)	(227,587)	(95,695)
Domestic Waste Collection/Recycling	2,864,810	2,665,803	(199,007)
Bulky Waste	(20,180)	(3,982)	16,198
Household Green Waste Collections	(525,610)	(534,362)	(8,752)
Food Waste	91,930	45,860	(46,070)
Sewage Disposal Plant	-	(57)	(57)
Street Cleansing General	1,048,640	1,128,167	79,527
WSU Depot	648,040	921,800	273,760
Garage	384,800	431,848	47,248
Trade Waste Collection	(210,600)	241,297	451,897
Chief Officer for Operations & Traded Services	98,820	106,177	7,357
Total Operations and Traded Services	4,408,108	5,105,735	697,627

Salary Variance	Agency Variance	Consultancy Cost Variance	Property Expenditure Variance	Transportation Expenditure Variance	General Running Expenditure Variance	Contractor Expenditure Variance	Fees and Charges Income Variance	Additional Grant drawdowns	Transfers to / from reserves
£	£	£	£	£	£	£	£	£	£
(41,846)	-	-	(5,278)	(1,010)	(10,209)	1,984	6,500	-	-
47,657	-	-	-	(9,002)	4,245	(2,138)	178,620	-	-
-	-	-	-	-	-	(68)	1,766	-	-
(54,999)	(11,434)	-	240	(57,102)	13,730	21,419	(7,550)	-	-
(234,561)	202,448	7,516	-	(27,536)	171,416	117,818	(455,902)	(605,758)	625,553
16,308	145	-	-	1,368	288	-	(1,911)	-	-
(109)	44,910	-	-	(28,093)	19,227	558	(45,244)	-	-
(5,930)	-	-	-	-	(85,140)	-	-	-	45,000
-	-	-	-	-	-	-	(57)	-	-
(22,579)	7,332	-	620	11,404	17,480	19,726	45,545	-	-
70,286	19,698	150,159	10,671	365	39,667	46,069	(49,360)	-	(13,795)
(28,747)	29,001	-	-	38,676	(21,785)	-	30,103	-	-
12,321	(11,734)	-	-	6,084	91,101	(28,790)	382,915	-	-
696	-	-	-	(133)	6,794	-	-	-	-
(241,503)	280,366	157,675	6,254	(64,979)	246,813	176,577	85,424	(605,758)	656,758

Appendix D – Financial Variances by Portfolio - Organisational Change

Portfolio breakdown	Revised Budget	Outturn 2025/26	Outturn Variance
	£	£	£
Organisational Change			
Transformation Change Unit	316,170	338,556	22,386
Transformation Unit - Organisational	44,110	6,097	(38,013)
Total Organisational Change	360,280	344,583	(15,627)

Salary Variance	Agency Variance	Consultancy Cost Variance	Property Expenditure Variance	Transportation Expenditure Variance	General Running Expenditure Variance	Contractor Expenditure Variance	Fees and Charges Income Variance	Additional Grant drawdowns	Transfers to / from reserves
£	£	£	£	£	£	£	£	£	£
(196,043)	62,274	76,026	-	(568)	14,223	100	18,270	-	48,034
(108,532)	-	-	-	-	297	-	-	-	70,222
(304,575)	62,274	76,026	-	(568)	14,519	100	18,270	-	118,256

Appendix D – Financial Variances by Portfolio - Chief Executive

Portfolio breakdown	Revised Budget	Outturn 2025/26	Outturn Variance
	£	£	£
Chief Executive			
Climate Change Programme	-	(9)	(9)
Executive Director	334,870	393,519	58,649
Total Chief Executive	334,870	393,510	58,640

Salary Variance	Agency Variance	Consultancy Cost Variance	Property Expenditure Variance	Transportation Expenditure Variance	General Running Expenditure Variance	Contractor Expenditure Variance	Fees and Charges Income Variance	Additional Grant drawdowns	Transfers to/ from reserves
£	£	£	£	£	£	£	£	£	£
-	-	-	17,710	-	188,398	-	-	-	(206,117)
24,827	-	7,705	-	(722)	41,909	-	-	-	(15,000)
24,827	-	7,705	17,710	(722)	230,306	-	-	-	(221,117)

Agenda No 7

AGENDA MANAGEMENT SHEET

Report Title:	Housing Revenue Account (HRA) report as at 31 March (Quarter 4)
Name of Committee:	Cabinet
Date of Meeting:	3 November 2026
Report Director:	Chief Financial Officer (S151 officer)
Portfolio:	Finance and Performance, Legal and Governance
Ward Relevance:	all
Prior Consultation:	Chief Financial Officer, Statutory Officers, Service Directors and Portfolio Holder
Contact Officer:	Gemma Lister, Lead Accountant, gemma.lister@rugby.gov.uk
Public or Private:	Public
Report Subject to Call-In:	Yes
Report En-Bloc:	No
Key Decision:	Yes
Corporate Priorities:	This report relates to the following priority(ies): ☐ A Healthier Rugby – To support people to live healthier, longer, and more independent lives. ☐ A Thriving Rugby – To deliver a thriving economy which brings Borough-wide investment and regenerates Rugby Town Centre. ☐ A Greener Rugby – To protect the environment and ensure the Borough adapts to climate change. ☐ A Fairer Rugby – To reduce inequalities and improve housing across the Borough. Corporate Strategy 2025-2035 ☒ This report does not specifically relate to any Council priorities but reporting financial performance is a keyway of demonstrating the success of delivering the Corporate Strategy.
Summary:	This report sets out the 2025/26 General Fund financial position for both revenue and capital as at 31 March (Quarter 4) and other adjustments for approval as required by Financial Standing Orders.

Local Government Reorganisation Implications:	None as a direct result of this report, however the medium-term financial position of Rugby Borough Council will have direct impact on the new operating model.
Financial Implications:	As detailed in the main body of the report
Risk Management/Health and Safety Implications:	This report is intended to give Cabinet an overview of the Council's Housing Revenue Account (HRA) outturn position for 2025/26 including all errors from prior years.
Environmental Implications:	There are no environmental implications arising from this report therefore no Climate Change and Environment Impact Assessment has been completed.
Legal Implications:	There are no legal implications arising from this report.
Equality and Diversity:	No new or existing policy or procedures have been recommended, and no equalities impact assessment is required for this report.
Options:	Members can elect to approve, amend or reject the carry forward requests and movements to reserves as listed below.
Recommendations:	(1) Cabinet acknowledges the Quarter 4 Outturn position as identified in this report, including all technical and non-recurring adjustments; and (2) Cabinet approves: (a) the carry forwards totalling £ 7.181m of ongoing Capital schemes to continue investment in the housing stock; and (b) the transfer of the surplus of £3.672m to the HRA Capital Financing Reserve.
Reasons for Recommendation:	A strong financial and performance management framework, including oversight by Members and all responsible officers is an essential part of delivering the Council's priorities and statutory duties.

Agenda No 7

Cabinet - 3 November 2026

Housing Revenue Account (HRA) as at 31 March (Quarter 4)

Public Report of the Chief Financial Officer

Recommendation

- (1) Cabinet acknowledges the Quarter 4 Outturn position as identified in this report, including all technical and non-recurring adjustments; and
- (2) Cabinet approves:
 - (c) the carry forwards totalling £ 7.181m of ongoing Capital schemes to continue investment in the housing stock; and
 - (d) the transfer of the surplus of £3.672m to the HRA Capital Financing Reserve.

EXECUTIVE SUMMARY

This report has been delayed due to a backlog of Invoices and other issues with Accounts Payable that needed to be worked through and cleared, the full financial impact has been ascertained to ensure that all expenditure related to 2025/26 was captured in the correct year.

Additional reviews that have been undertaken to validate and ensure that we have the correct position at the end of 2025/26.

These additional reviews have identified items that had been missed from the original draft Qtr. 4 Outturn position (not published) and identified further corrections in how provisions for bad debt were being calculated.

Additional errors were found following a further review of the interest allocations and calculations between the General Fund and the Housing Revenue Account (HRA).

The missing expenditure, impact of the additional provisions for bad debt and correcting the allocation of interest, have all been considered and are included in the updated Qtr. 4 Outturn position (a bridge analysis has been provided in Appendix A).

To ensure Cabinet can fully understand the Qtr. 4 Outturn position and to understand and consider the full and complete position this report provides additional detail regarding the errors and financial impact

This draft Outturn position includes all items and errors that are being corrected from prior years.

These adjustments are anticipated to need to be shown differently in the final Statement of Accounts – following discussions with the External Auditors on final presentation of the 2025/26 Statement of Accounts.

The Balance Sheet at the end of 2025/26 should remain the same (subject to any other audit adjustments), with the in-year surplus being adjusted to carry back prior year impacts.

The Housing Revenue Account showed a break-even position in 2025/26 against the approved HRA budget after a movement of £3.672m to Earmarked Reserves.

A copy of the draft statement of accounts is published on the Council's website at <https://www.rugby.gov.uk/w/statement-of-accounts>.

The following appendices are attached:

- Appendix A – Bridge Analysis
- Appendix B – Service Breakdown
- Appendix C – Capital Schemes Carried Forward From 2025/26
- Appendix D – Projection of Future Earmarked Reserves

1. BACKGROUND

- 1.1. Local Authorities have a requirement to account separately for core operational services and the provision of dwellings. This is achieved by creating two reporting functions; the General Fund and the Housing Revenue Account.
- 1.2. The information in this report as at 31 March (quarter 4) is the final position for the year end 2025/26 for the Housing Revenue Account (HRA), prior to any audit adjustments.
- 1.3. The Outturn position has been produced before the completion of the external audit of the accounts and is subject to change.

2. OVERVIEW

- 2.1. Financial Summary
 - 2.1.1. The Housing Revenue Account showed a break-even position in 2025/26 against the approved HRA budget after a movement of £3.672m to Earmarked Reserves.
 - 2.1.2. The table below contains a breakdown from the original draft Outturn (not published) and the summarises changes to get to the final Outturn position for the year. Further details are available at Appendix A.

Adjustments after unpublished outturn

	£ 000's
Additional Accruals and WIP	419
Bad Debt Provision	316
Increase in provision for rents overcharging	603
Transfer of spend from capital	138
Abortive works	150
Interest Payable	789
Interest Receivable	(2,327)
Adjustment to Major Repairs Reserve	24
Total Adjustments	112

2.1.3. The planned transfer of an initially projected surplus of £3.785m to the capital financing reserve has been reduced by £0.112m to £3.672m

2.1.4. The capital programme for 2025/26 is £22.225m and total actual expenditure on these capital schemes has been £16.561m.

2.1.4.1. A total of £7.181m of ongoing capital expenditure has been identified as being required to continue with these schemes into 2026/27. The main reasons for this are the ongoing purchase of properties from RTB receipts (£3.628m), ongoing improvements to council dwellings (£1.412m) and the ongoing redevelopment of Rounds Gardens (£1.560m).

3. OUTTURN V BUDGET

3.1. The table below shows the summary of the outturn position against the actual budget as at the end of Qtr. 4.

3.1.1. Previous variations to services are provided for indicative purposes.

3.1.2. Previous Quarters are shown with estimated transfers to/from reserves, as the actuals only materialise during the end of year work, whilst establishing the draft outturn position and the HRA statement.

3.1.3. The movement against budget would have been an adverse variance totalling £0.124m. However, the planned movement to earmarked reserves of £3.796m, has been reduced to £3.672m, thus ensuring the HRA produced a break-even position.

3.1.4. The total adjustments as per para 2.1.2 (£0.112m), are included in the £0.124m variance against budget

CIES Section	Revised Budget £000	Actual Outturn £000	Variance to Budget Qtr 4 £000	FOT Qtr 3 £000	FOT Qtr 2 £000	FOT Qtr 1 £000
HRA Service Budgets	14,244	15,668	1,424	874	631	486
Rental Income	(20,601)	(20,157)	444	124	124	0
Interest (net)	42	(1,772)	(1,814)	(313)	(313)	0
Total	(6,315)	(6,261)	54	685	442	486
Transfers to/from Earmarked Reserves	(850)	(304)	546	0	0	0
Major Repairs Allowance	2,683	2,683	0	0	0	0
Technical Adjustments	686	210	(476)	0	0	0
Total HRA (Surplus)/Deficit	(3,796)	(3,672)	124	685	442	486

Further explanations of movements and significant adjustments are detailed below.

4. REVENUE POSITION (APPENDIX A Bridge Analysis)

4.1. The 2025/26 year-end final revenue forecast variances against the Budget are summarised below.

Description	Budget 2025/ 26	Outturn 2025/ 26	Variance
Total Extra Care	1,174,190	928,575	(245,615)
Control Centre (HRA)	551,530	461,938	(89,592)
Control Centre CCTV	4,000	10,975	6,975
Supervision and Management General	0	20,883	20,883
Stock condition survey	150,000	49,823	(100,177)
Transformation Project	0	7,094	7,094
Housing Management	5,181,640	5,848,562	666,922
Property Maintenance	458,890	458,011	(879)
Multi-Storey Flats	0	(426)	(426)
Navigation Way Service charges	0	5,445	5,445
Total Housing Management	6,346,060	6,862,305	516,245
Unplanned Maintenance and Repair	3,632,990	4,290,136	657,146
Gas Heating Systems	0	5	5
Repainting Schemes	0	54	54
Repairs and Maintenance - Void works	1,371,620	1,344,640	(26,980)
Miscellaneous Unplanned Maintenance and Repair	0	152,966	152,966
Repairs and Maintenance - rechargeable works	14,000	(51,889)	(65,889)
Void rechargeable repairs	68,000	102,026	34,026
Housing Planned Maintenance	1,350,000	1,718,039	368,039
Interim Manager UMR00	0	1,043	1,043
Maintenance of Open Spaces	287,260	320,365	33,105
Total Repairs and Maintenance	6,723,870	7,877,384	1,153,514
Miscellaneous Income	(20,600,700)	(20,156,735)	443,965
Interest Payable	1,104,490	1,863,971	759,481
Interest Receivable	(1,062,500)	(3,635,498)	(2,572,998)
Major Repairs Allowance	2,682,948	2,682,949	1
Total Net Expenditure	(3,631,642)	(3,577,049)	54,593
Cost of Capital	685,292	0	(685,292)
Cost of Capital - corporate items	0	17,847,055	17,847,055
Contribution To Housing Repairs Account	0	0	0
HRA - Other Operating Expenditure	0	(1,509,854)	(1,509,854)
HRA - Financing and Investment Income and Expenditure	0	32,362	32,362
HRA - Taxation and Non Specific Grant Income	0	(4,830,032)	(4,830,032)
HRA - Accounting and Funding Basis Adjustments	(850,000)	(10,575,953)	(9,725,953)
HRA - Transfers to/from Earmarked Reserves	0	(1,058,671)	(1,058,671)
Other Adjustments & Reserve Transfers	(164,708)	(95,093)	69,615
Transfer of Surplus to Capital Financing Reserve	3,796,350	3,672,142	(124,208)
Total HRA Surplus/ Deficit	0	0	0

4.2. The HRA has delivered a surplus of £3.672m, that will be transferred to the Capital Financing Reserve to fund ongoing investment in the Housing Stock.

4.3. Further details of service variances can be found in Appendices A to C.

5. SUMMARY OF KEY VARIATIONS TO BUDGET BY CATEGORY

5.1. The main contributing factors to the position are shown below.

Summary - Key Categories Variances v Budget	£ 000's	
Salary variance	(742)	Underspend
Agency variance	337	Overspend
Utilities	(75)	Underspend
Other Property and Transport Costs	(5)	Underspend
Running Costs	(271)	Underspend
External Contract Payments	833	Overspend
Bad Debt Provision	249	Overspend
Rent Overcharge Provision	1,017	New Provision
Rental and Other Income	485	Under Performance
Interest (net)	(1,813)	Adjustment
Technical Adjustments	39	
Total Net Expenditure Variance	54	Overspend

5.2. Recruitment to fill permanent posts continues to be a challenge, with different factors all contributing to the issue.

5.3. Following a review by the Social Housing Regulator, there has been an increase in external contract payments in order to complete compliance works in properties. This was part funded by a transfer from the capital reserve.

5.4. Adjustments to interest calculations, rent overcharge provision and bad debt provision were identified during the year end process and these have also been included.

6. RENT OVERCHARGE PROVISION

6.1. As part of the work carried out by the Social Housing Regulator, it has been identified that there may be an issue when calculating rents and how these were then charged. An exercise was carried out to identify the potential scale of the problem going back 6 years, and a provision of £0.414m was created.

6.2. Following further work on this, it was felt that the calculation needed to identify when the issue may have started. This went back a total of 14 years and therefore an additional £0.603m was added to the provision. Data validation is still ongoing due to a change of Housing system in 2022, and discussions are still ongoing with the Social Housing Regulator.

7. RECALCULATION OF INTEREST TO AND FROM THE HRA

7.1. During the review of 2025/26, errors have been identified in the calculation of interest charged and received between the General Fund and the HRA.

7.2. Categories of assets had been incorrectly excluded from the calculation, including the balance of the loans taken out for 2 major house building schemes that were planned/under way

7.2.1. It appeared that all the interest associated with these loans had been charged to the HRA, unfortunately the balance of the loan unused cash element had been excluded from the assets for the calculation of what interest was owed to the HRA.

7.2.2. It was also identified that the amount the HRA had been paying on the 'internally borrowed funds' had also been excluded from the calculations. This would offset partially but not completely all the money owed to the HRA

7.3. The nett amount is a total of £1.538m and was calculated to be owed to the HRA, going back and covers all years that the calculation appears to be wrong, however some of the years when considered in isolation would not be material and may not have been enough to warrant a change in the calculation or movements to and from the HRA.

7.4. This will be a discussion with the external auditors, however from an accounting position all entries have been accrued/provided for in the 2025/26 Qtr. 4 position and the draft statement of accounts.

8. HRA RESERVE BALANCES

8.1. A summary of HRA balances held in earmarked and other key reserves are shown in the table below

Name of reserve	Balance at 01/04/25 £000	Actual contribution (to) 25/26 £000	Actual contribution from 25/26 £000	Balance at 31/03/26 £000
HRA Working Balance	(4,085)	0	0	(4,085)
Capital Financing Reserve	(17,621)	(3,672)	9,820	(11,473)
Transformation Reserve	(227)	(300)	374	(153)
Sheltered Housing Reserve	(456)	(50)	0	(506)
RTB 1-4-1 Replacement	(12,023)	(5,695)	2,841	(14,877)
Major Repairs Reserve	(6,127)	(2,738)	3,033	(5,831)
Climate Change Reserve	(1,512)	(9,520)	1,059	(9,974)
Rent Overcharge Provision	0	(1,017)	0	(1,017)
Total HRA Reserves	(42,050)	(22,992)	17,127	(47,916)

8.2. There has been a transfer of £9.520m between the Capital Financing Reserve and the Climate Change Reserve. This is matched funding for the Wave3 Warm Homes Capital Project and will be utilised during the next 2 financial years.

9. CAPITAL EXPENDITURE

9.1. A summary of the capital budget, expenditure and carry forward requests are contained in the table below: -

	Budget 2025/26 £000	Expenditure in year £000	Carried Forward to 2026/27 £000	Variance to Budget £000
Capital	22,225	16,561	(7,181)	1,517

9.2. The approved capital programme for 2025/26 is £22.225m and total actual expenditure on these capital schemes has been £16.561m.

9.3. A total of £7.181m of ongoing capital expenditure has been identified as being required to continue with these schemes into 2026/27.

9.4. The review of what is needed to be carried forward and the completion of some of the capital projects has identified an increase in anticipated requirements in 2025/26 totalling £1.517m.

Increase in Capital Requirement include: -

- £1.288m in relation to the completion of new build homes at Biart Place (borrowing)
- £145k in relation to additional rewiring works required following stock condition surveys carried out (major repairs reserve)
- £76k of additional spend on Disabled Adaptations (major repairs reserve)

9.5. Appendix C, contains a detailed breakdown on a per scheme basis of the amount of capital being requested to be carried forward into 2026/27

10. CAPITAL FINANCING

10.1. During the year end process a review of all capital receipts and expenditure is undertaken, and the most advantageous use of Grants and Capital Receipts is applied as part of the allocation and use of Capital Financing.

10.2. The table below summarises the use and allocation of resources against the Capital expenditure incurred in 2025/26.

	DRF Capital Reserve £000	Borrowing £000	Major Repairs Reserve £000	Government & Other Grants and contributions £000	RTB Receipts £000	Grand Total £000
Grand total	616	5,241	3,033	4,830	2,841	16,561

- 10.3. To clarify, a total of £5.241m referred to as borrowing, is relating to the balance of funds that was taken out in 2020 to fund new build schemes. No new borrowing has been incurred in 2025/26.
- 10.4. The HRA is already being charged for the interest costs associated with external loans taken out and this interest is built into the HRA budget.
- 10.5. The government grants received relate to monies claimed from Homes England totalling £1.7m towards the new build scheme at Biart Place, and a further £3.130m received from the Department of Energy Security and Net Zero for the Warm Homes Wave 3 Project.

Appendices

- A. Bridge set out showing all the changes between draft Qtr. 4 (not published) and the final Qtr. 4 position
- B. Service Analysis
- C. Capital Programme – Outturn, Carried Forward from 2025/26, Financing
- D. Projection of Future Earmarked Reserves and usage

Appendix A – Bridge Summary

	Movements										Revised Outturn 2025/26	Budget	Variance 2025/26
	Original Outturn 2025/26	Accruals	Bad Debt Provision	Rents Overcharging	Non Capital Spend	Abortive Works	CFR Interest	Major Repairs Movement	Transfer to Capital Reserve	Total Movment			
Income													
Dwelling Rents	(18,919)									0	(18,919)	(19,229)	310
Non-dwelling rents	(98)									0	(98)	(129)	31
Charges for services	(1,108)									0	(1,108)	(1,212)	104
Contributions towards expenditure	(175)									0	(175)	(214)	39
Total Income	(20,300)	0	0	0	0	0	0	0	0	0	(20,300)	(20,784)	484
Expenditure													
Repairs and maintenance	6,759	336			138	150				624	7,383	6,671	712
Supervision and management	7,047	83		603						686	7,733	7,083	650
Rents, rates, taxes and other charges	65									0	65	152	(87)
Depreciation and impairment of non-current assets	2,738							24		24	2,762	3,434	(672)
Total Expenditure	16,610	419	0	603	138	150	0	24	0	1,334	17,944	17,340	604
Net (Income)/Expenditure or Income of HRA Services as included in the Comprehensive Income and Expenditure Statement	(3,690)	419	0	603	138	150	0	24	0	1,334	(2,356)	(3,444)	1,088
HRA Share of Corporate and Democratic Core costs	374									0	374	318	56
Net (Income)/Expenditure of HRA Services	(3,316)	419	0	603	138	150	0	24	0	1,334	(1,982)	(3,126)	1,144
(Gain) or Loss on sale of HRA non-current assets	0									0	0	0	0
Interest payable and similar charges	1,075						789			789	1,864	1,105	759
Interest and investment income	(1,308)						(2,327)			(2,327)	(3,635)	(1,063)	(2,572)
Pension interest and expected return on pension assets	0									0	0	0	0
Capital grants and contributions receivable	0									0	0	0	0
Increase in Provision for Bad Debts	19		316							316	336	86	250
(Surplus)/Deficit for the year on HRA services, Prior to Movements to Reserves	(3,531)	419	316	603	138	150	(1,538)	24	0	112	(3,418)	(2,998)	(420)
Reserve Movements													
Sheltered Housing Reserve	50									0	50	50	0
Transformation Reserve	(373)									0	(373)	0	(373)
Capital Expenditure Funded from Revenue	616									0	616	0	616
Transfer of HRA Reserves - Repairs	0									0		(837)	
Transfer of HRA Surplus to Investment Reserve	3,785								(112)	(112)	3,672	3,785	(113)
Transfer from Climate Change Reserve	(546)									0	(546)	0	(546)
	3,531	0	0	0	0	0	0	0	(112)	(112)	3,418	2,998	420

Appendix B – Service Breakdown

Description	Budget 2025/ 26	Outturn 2025/ 26	Variance
Total Extra Care	1,174,190	928,575	(245,615)
Control Centre (HRA)	551,530	461,938	(89,592)
Control Centre CCTV	4,000	10,975	6,975
Supervision and Management General	0	20,883	20,883
Stock condition survey	150,000	49,823	(100,177)
Transformation Project	0	7,094	7,094
Housing Management	5,181,640	5,848,562	666,922
Property Maintenance	458,890	458,011	(879)
Multi-Storey Flats	0	(426)	(426)
Navigation Way Service charges	0	5,445	5,445
Total Housing Management	6,346,060	6,862,305	516,245
Unplanned Maintenance and Repair	3,632,990	4,290,136	657,146
Gas Heating Systems	0	5	5
Repainting Schemes	0	54	54
Repairs and Maintenance - Void works	1,371,620	1,344,640	(26,980)
Miscellaneous Unplanned Maintenance and Repair	0	152,966	152,966
Repairs and Maintenance - rechargeable works	14,000	(51,889)	(65,889)
Void rechargeable repairs	68,000	102,026	34,026
Housing Planned Maintenance	1,350,000	1,718,039	368,039
Interim Manager UMR00	0	1,043	1,043
Maintenance of Open Spaces	287,260	320,365	33,105
Total Repairs and Maintenance	6,723,870	7,877,384	1,153,514
Miscellaneous Income	(20,600,700)	(20,156,735)	443,965
		0	
Interest Payable	1,104,490	1,863,971	759,481
Interest Receivable	(1,062,500)	(3,635,498)	(2,572,998)
Major Repairs Allowance	2,682,948	2,682,949	1
Total Net Expenditure	(3,631,642)	(3,577,049)	54,593
Cost of Capital	685,292	0	(685,292)
Cost of Capital - corporate items	0	17,847,055	17,847,055
Contribution To Housing Repairs Account	0	0	0
HRA - Other Operating Expenditure	0	(1,509,854)	(1,509,854)
HRA - Financing and Investment Income and Expenditure	0	32,362	32,362
HRA - Taxation and Non Specific Grant Income	0	(4,830,032)	(4,830,032)
HRA - Accounting and Funding Basis Adjustments	(850,000)	(10,575,953)	(9,725,953)
HRA - Transfers to/from Earmarked Reserves	0	(1,058,671)	(1,058,671)
Other Adjustments & Reserve Transfers	(164,708)	(95,093)	69,615
Transfer of Surplus to Capital Financing Reserve	3,796,350	3,672,142	(124,208)
Total HRA Surplus/ Deficit	0	0	0

Appendix C – Capital Outturn

Capital schemes carried forward from previous agreed budgets into 2026/27	Balance Carried Forward to 2026/27
Description	£ 000'
Garage Management Plan	275
Housing Management System	48
Fire Risk Prevention Works	7
Lifeline Renewal Programme	20
Replacement Footpaths	65
Roof Refurbishment - Tanser Court	310
Driveways	25
Fire Risk Prevention works voids	23
Rewiring Unplanned Renewals	65
Fire Risk Unplanned Renewals	58
Kitchen Modifications	226
Kitchen Modifications Voids	143
Kitchens non voids	24
Heating Upgrades	5
Bathroom Modifications	36
Bathroom Modifications - voids	60
Bathrooms non voids	23
Low Carbon Skills Fund	58
Carbon Management Plan (HRA)	11
Carbon Management Plan W3	3
Purchase of Council Houses	3,899
Rounds Gardens demolition	308
Rounds Gardens- Design and Legal Fees	1,252
Roof Replacement Programme	237
Total of all schemes carried forward into 26/27	7,181

Appendix D– Projection of Future Earmarked Reserves and usage

- This is a projection of possible draw down from reserves – for indicative purposes only
- Further work is required to confirm and verify more accurately exactly what drawdowns from reserves in 2026/27 and beyond will be required

Name of reserve	Balance at 01/04/25	Actual contribution (to)/from 25/26	Balance at 31/03/26	Forecast contribution (to)/from 26/27	Anticipated Usage in 26/27	Balance at 31/03/27	Anticipated Usage in 27/28	Anticipated transfer between reserves in 27/28	Balance at 31/03/28	Anticipated transfer between reserves in 28/29	Balance at 31/03/29	Anticipated transfer between reserves in 29/30	Balance at 31/03/30
	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000	£000
HRA Working Balance	(4,085)	0	(4,085)	0	(4,085)	0	(4,085)	0	(4,085)	0	(4,085)	0	(4,085)
Major Repairs Reserve	(6,127)	295	(5,832)	5,039	(793)	793	0	0	0	0	0	0	0
Capital Financing Reserve	(17,621)	6,148	(11,473)	(3,229)	(14,702)	(893)	(15,595)	3,722	(11,873)	3,033	(8,840)	368	(8,472)
Climate Change Reserve	(1,512)	(8,461)	(9,973)	4,907	(5,066)	5,066	(0)		(0)		(0)		(0)
Transformation Reserve	(227)	74	(153)		(153)		(153)		(153)		(153)		(153)
Sheltered Housing Rent Reserve	(456)	(50)	(506)		(506)		(506)		(506)		(506)		(506)
Rent Overcharge Provision	0	(1,017)	(1,017)		(1,017)		(1,017)		(1,017)		(1,017)		(1,017)
RTB Receipts	(12,023)	(2,854)	(14,877)	3,584	(11,293)	1,085	(10,208)	1,085	(9,123)	1,085	(8,038)	1,085	(6,953)
Total HRA Reserves	(42,050)	(5,865)	(47,916)	10,301	(37,615)	6,051	(31,564)	4,807	(26,756)	4,118	(22,638)	1,453	(21,185)

AGENDA MANAGEMENT SHEET

Report Title: Discretionary Rate Relief Policy

Name of Committee: Cabinet

Date of Meeting: 3 November 2026

Report Director: Chief Financial Officer

Portfolio: People, Resources and Governance

Ward Relevance: ALL

Prior Consultation: None

Contact Officer: Colin Jones, Interim Revenues and Benefits Manager
colin.jones@rugby.gov.uk

Public or Private: Public

Report Subject to Call-In: Yes

Report En-Bloc: No

Key Decision: No

Corporate Priorities: This report relates to the following priority(ies):
☐ A Healthier Rugby – To support people to live healthier, longer, and more independent lives.
☒ A Thriving Rugby – To deliver a thriving economy which brings Borough-wide investment and regenerates Rugby Town Centre.
☐ A Greener Rugby – To protect the environment and ensure the Borough adapts to climate change.
☒ A Fairer Rugby – To reduce inequalities and improve housing across the Borough.
[Corporate Strategy 2025-2035](#)
☐ This report does not specifically relate to any Council priorities but

Summary: This report seeks approval of the revised Non-Domestic Rates Discretionary Rate Relief Policy. The revision incorporates the Governments 2026 Supporting Small Business Relief Scheme and Electric Vehicle Charging Point Relief.

Local Government Reorganisation Implications:

Financial Implications:	There are no direct local government reorganisation implications There is no direct cost to the Council from awards made in accordance with the Government schemes. The Government will reimburse billing authorities and precepting authorities for losses under the rate retention scheme through section 31 grant.
Risk Management/Health and Safety Implications:	If relief is awarded outside the Government criteria, the Council may not be reimbursed. The risk will be managed by applying the revised policy and the relevant Government guidance.
Environmental Implications:	Electric Vehicle Charging Point Relief supports dedicated electric vehicle charging infrastructure. The policy change therefore has a positive but indirect environmental effect. An environmental impact assessment is not required.
Legal Implications:	Section 47 of the Local Government Finance Act 1988, as amended, allows the Council to grant discretionary rate relief. The Subsidy Control Act 2022 applies to awards as set out in the government guidance. Government reimbursement is made under section 31 of the Local Government Act 2003.
Equality and Diversity:	The schemes are property and liability based and apply according to published eligibility criteria. No differential impact on protected groups has been identified and an equality impact assessment is not required.
Options:	The Council may approve the revised policy or decide not to approve it. If it is not approved, the Council would not have an adopted local policy covering the two new Government funded reliefs.
Recommendation:	The revised Discretionary Rate Relief Policy attached at Appendix 1, incorporating the 2026 Supporting Small Business Relief Scheme and Electric Vehicle Charging Point Relief Scheme, with effect from 1 April 2026, be approved.
Reasons for Recommendation:	To enable the Council to award the two Government funded reliefs consistently and in accordance with section 47 and Government guidance.

Cabinet - 3 November 2026

Discretionary Rate Relief Policy

Public Report of the Chief Financial Officer

Recommendation

The revised Discretionary Rate Relief Policy attached at Appendix 1, incorporating the 2026 Supporting Small Business Relief Scheme and Electric Vehicle Charging Point Relief Scheme, with effect from 1 April 2026, be approved.

1 Executive Summary

- 1.1 This report seeks Cabinet approval to adopt the revised Discretionary Rate Relief policy attached as Appendix 1. The policy has been updated to include the Supporting Small Business Relief Scheme and the Electric Vehicle Charging Point Relief by the government from 1 April 2026.
- 1.2 Supporting Small Business Relief limits the increase in business rate bills for eligible ratepayers affected by the 2026 revaluation. Electric Vehicle Charging Point relief provides 100% relief for qualifying separately assessed public charging points for the financial years 2026/27 to 2035/36
- 1.3 Both schemes are administered by billing authorities using their discretionary powers under section 47 of the Local Government Finance Act 1988. The government will reimburse Rugby Borough Council for qualifying awards through section 31 grant funding. There should be no direct financial cost to the Council where relief is awarded in accordance with the government schemes
- 1.4 Approval of the revised policy will allow officers to administer the new relief consistently and in line with government guidance. It will provide support to eligible small businesses affected by increases in their bills and encourage the provision of publicly accessible electric vehicle charging facilities.

2 Background

- 2.1 Section 47 of the Local Government Finance Act 1988, as amended, allows a billing authority to reduce or remit a ratepayer's non-domestic rates liability. The Council must adopt a local scheme and decide each case having regard to the relevant Government guidance.
- 2.2 Following the Autumn budget and the 2026 Business Rates revaluation, the Government introduced the 2026 Supporting Small Business Relief Scheme. It also introduced a separate relief for eligible electric vehicle charging point properties.

- 2.3 The Council's Discretionary Rate Relief Policy has been updated to include both schemes. The revised policy is attached at Appendix 1.

3 Supporting Small Business Relief

- 3.1 The 2026 Supporting Small Business Relief Scheme applies for the financial years 2026/27 to 2028/29. It protects eligible ratepayers who face a significant increase in their bill at the 2026 revaluation because they lose some or all of their Small Business Rate Relief, Rural Rate Relief, Retail Hospitality and Leisure Relief or the 2023 Supporting Small Business Relief.
- 3.2 For eligible ratepayers, the annual increase is limited to £800 or the relevant transitional relief cap, whichever gives the higher bill. The Council will calculate and award the relief automatically where the qualifying information is held.
- 3.3 Charities and Community Amateur Sports Clubs entitled to 80% mandatory relief are not eligible. Awards must comply with the Subsidy control requirements set out in the Government guidance.

4 Electric Vehicle Charging Point Relief

- 4.1 The relief provides 100% business rate relief for eligible dedicated electric vehicle charging point properties for the financial years 2026/27 to 2035/36. The local scheme must allow relief to be backdated to 1 April 2023 where the property met the eligibility conditions from that date.
- 4.2 To qualify, the property must be separately assessed by the Valuation Office Agency as an electric vehicle charging point site, under Special Category Code 718. It must be occupied, operational, energised, accessible and open to customers.
- 4.3 Charging bays that form part of a larger property and do not have a separate rateable value are not eligible. Eligibility and the amount of relief are assessed on a daily basis.
- 4.4 Awards made in accordance with the Government scheme are not subject to a value cap and do not count towards the Minimal Financial Assistance. Individual awards above £100,000 must be recorded on the subsidy control database.

5 Financial, Legal and Administrative implications

- 5.1 The Government will fully reimburse billing authorities and major precepting authorities for the loss of income arising from qualifying awards under the rates retention scheme. Reimbursement will be made by Section 31 grant.
- 5.2 The revised policy sets out the eligibility rules, the order in which reliefs are applied, recalculation following a change of circumstances and the relevant subsidy control requirements. This provides a clear basis for consistent decision making and protects the Council 's entitlement to reimbursement.

Name of Meeting: Cabinet

Date of Meeting: 3 November 2026

Subject Matter: Discretionary Rate Relief Policy

Originating Department: Chief Executive's Directorate

DO ANY BACKGROUND PAPERS APPLY ☐ YES ☒ NO

LIST OF BACKGROUND PAPERS

Doc No	Title of Document and Hyperlink

The background papers relating to reports on planning applications and which are open to public inspection under Section 100D of the Local Government Act 1972, consist of the planning applications, referred to in the reports, and all written responses to consultations made by the Local Planning Authority, in connection with those applications.

☐ Exempt information is contained in the following documents:

Doc No	Relevant Paragraph of Schedule 12A

Non-Domestic Rates – Discretionary Rate Relief Policy Rates – Discretionary Rate Relief

Non-profit making bodies & Charitable relief top-up

Section 47 of the Local Government Finance Act 1988 gives Councils the power to grant rate relief to organisations that meet certain criteria.

Councils have discretion to grant rate relief from all or part of the amount of non-domestic rates payable and any relief granted is used to reduce the amount the organisation is required to pay in business rates.

The Council recognises the valuable role that voluntary organisations can and do play in the life of the community. It is committed to providing high quality services to Rugby residents and acknowledges the way voluntary groups can complement these services.

The following sections set out the factors we will consider when deciding whether to grant relief, and the way in which we will decide the value of any relief granted.

We will deal with each application for relief on its merits and treat all organisations that apply equally and fairly.

Criteria

The criteria to be used in deciding whether to give discretionary rate relief are designed to assess how an organisation's work helps achieve the Council's priorities and meet the community's need for services and facilities.

The Council will consider applications for relief where the following key criteria are met:

- the ratepayer is a non-profit making body;
- the property is used by the ratepayer wholly or mainly for charitable, philanthropic or religious purposes, or concerned with education, social welfare, science, literature or the fine arts; or
- the ratepayer uses the property wholly or mainly for recreation by a non-profit making club or society.
- The ratepayer occupies the property wholly or mainly to provide services that would otherwise have to be provided by the local authority.

Registered charities in receipt of mandatory relief of 80% can apply for discretionary relief on the remaining 20% of their bill.

Other organisations that meet these criteria, such as voluntary organisations and not-for-profit sports clubs, can apply for relief of up to 100%.

The Council will not normally consider applications from organisations in the following categories;

- National Charity Shops
- Organisations whose objectives are wholly or mainly concerned with education and which are already receiving Mandatory relief (80%)
- Administrative offices of national charitable organisations which are already in receipt of Mandatory relief (80%)
- Organisations which have a commercially operative bar within the relevant property serving alcohol.
- Organisations that have an audited income of more than £1 million per annum.

The following additional criteria will also be applied where applicable:

Equal opportunities - The organisation should have an appropriate policy that aims to give equal opportunities to both any employees it has and to people in the community it services. A copy of a formal policy should be submitted with the discretionary relief application. If a written policy is not available, evidence must be provided that the organisation does not unfairly discriminate against any section of the community.

Open access to membership - Membership should be open to all sections of the community. There may be some restrictions placed on ability in sport if this is appropriate, however, in general membership should not be exclusive or restrictive.

Membership fees – These must not be set at such a level as to exclude the general community. The Council would expect applicants to state their current membership rates, and to illustrate that the criteria used to consider applications for membership is consistent with the principle of open access.

Applications will be dealt with more sympathetically if an organisation can demonstrate it actively encourages membership from, or offers support to, particular groups in the community such as young people, women, older people, persons with a disability or ethnic minorities.

Beneficiaries of services or facilities - The organisation should provide training or education to its members, and non-members such as young people, people with disabilities, or retired people. The organisation should provide facilities that indirectly relieve the Council of the need to do so or enhance and supplement those it does provide.

Affiliation to local or national organisations - The organisation should be actively involved in local/national development of their interests.

Financial support from external sources - Copies of the organisation's last two years' audited accounts must be provided with the application to assist the Council in assessing the ability of the applicant to meet the costs of rates in the absence of additional rate relief. It should be made clear on the application form the level of funding given to the organisation by the Council and or any other external bodies.

Amount of relief

As noted above, the Council has the discretion to allow relief at any rate up to 100% of the business rates charge, less any mandatory relief an organisation is entitled to.

Entitlement will be assessed against the criteria and factors described above.

Period of award

The Council will decide the period that relief will be awarded for depending on the circumstances of the application. The minimum period of relief that can be awarded is one day.

Unless stated otherwise, relief will be awarded from the start of the current financial year or the date liability started, whichever is later. The Council will periodically review the relief and invite renewal applications.

If after review, the relief is no longer applicable and to be cancelled, the Council will write to you to notify you. The relief can be cancelled back to the date it was no longer applicable, but will not be cancelled earlier than the start of the previous financial year.

Relief may be backdated to the beginning of the current financial year.

How to apply

A claim must be made on an approved application form which is available on rugby.gov.uk/business-rates or on request.

It is the responsibility of the organisation applying for relief to provide sufficient information and documentary evidence to support its application.

Completed applications, including all necessary supporting documentation, should be sent to:

Rugby Borough Council, Town Hall, Rugby CV21 2RR

or emailed to nondom.rates@rugby.gov.uk.

Where further information is required, we will request this and allow a minimum of 21 days for it to be provided.

If this is not received, we will still consider the application but only on the basis of the information and evidence in our possession.

Subsidy Control

Please note that any award of discretionary rate relief must comply with the Minimal Financial Assistance rules.

Financial aid is allowed under the de minimis rules if the total amount of funding received by an organisation does not cumulatively exceed £315,000 over a three-year period.

Any assistance you have received, or are due to receive, from a public body may count as de minimis. This could be any aid, grant or support from central, regional or devolved governments, agencies, or a local authority.

Right of appeal

If you disagree with a decision made under this policy, you may write and tell us why you think our decision is wrong. If you are able to provide further information to address the reasons given as to why your application was unsuccessful, you may do so and we will reconsider our decision in the light of the new information.

If the Council's decision is still not to award relief, you may ask for a full review. The Chief Finance Officer, who is not involved in the original decision, will check your application and supporting evidence thoroughly, taking into account any further information given in your appeal letter, then decide whether the policy have been properly applied in your case.

The Chief Finance Officer has the authority to

- confirm the decision;
- change the decision and award you more discretionary rate relief; or
- change the decision and award you less discretionary rate relief.

The Council will write to tell you what has happened, normally within 7 days of the decision.

There is no further right of appeal against a decision made.

Rural rate relief

You could get rural rate relief if your business is in an eligible rural area with a population below 3,000. Your business must also be:

- the only village general store, food shop or post office, with a [rateable value](#) of up to £8,500
- the only public house or petrol station, with a rateable value of up to £12,500

If there's more than one business in the area, both businesses can still apply if they are different types of business - for example, a public house and a food shop.

The property must be occupied.

What you'll get

You will not pay business rates if your business is eligible for rural rate relief.

How to get rural rate relief

Rugby Borough Council manages business rates relief in our area.

[Contact us](#) to:

- check if you're in an eligible rural area - the council will have a list of eligible areas and maps of those areas
- check if your type of business is eligible for rural rate relief
- find out how to get rural rate relief

If your circumstances change

Report changes to make sure you're paying the right amount and do not get a backdated increase in your bill or overpay.

[Contact us](#) if:

- your property becomes empty
- you get another property
- you make any changes to your property that would increase its value - for example, extending or renovating it
- the nature of your business changes or it moves to different premises

If you stop being eligible for rural rate relief, you'll usually need to pay your business rates bill starting from the day your circumstances changed.

Relief for Pubs and Live Music Venues

From 27 January 2026, the Government announced that eligible pubs and live music events in England will receive a 15% reduction on their business rates bills for the 2026/27 financial year.

Hereditaments that meet the eligibility criteria for pubs and live music venues relief will be occupied hereditaments which meet all of the following conditions for the chargeable day:

They are wholly or mainly used:

- As a pub
- As a live music venue

Pubs

A pub is considered to mean a hereditament where the following criteria apply:

- Is open to the general public
- Allows free entry other than when occasional entertainment is provided
- Allows drinking without requiring food to be consumed
- Permits drinks to be purchased at a bar

For these purposes, the meaning of a pub does not include:

- Restaurants, cafes, nightclubs, snack bars
- Hotels, guesthouses, boarding houses
- Sporting venues
- Festival sites, theatres, cinemas
- Museums, exhibition halls
- Casinos

The proposed exclusions in the list above is not intended to be exhaustive and it will be for the Council to determine those cases where eligibility is unclear.

Where eligibility is unclear, the Council should also consider broader factors in its assessment – i.e. in meeting the stated intent of the policy that it demonstrates the characteristics that would lead it to be classified as a pub by the natural meaning of the word. For example: being owned and operated by a brewery, establishments that are open to wide sections of local communities and practically operate as a pub for that local community e.g. working men's club.

Live Music Venues

A live music venue is considered to mean a hereditament that:

- a) Is wholly or mainly used for the performance of live music for the purposes of entertaining an audience

b) Can be used for other activities but only if those other activities:

- Are ancillary or incidental to the performance of live music (e.g. the sale of food or drink to audience members)
- Do not affect the primary use of the premises for the performance of live music (e.g. because the activities are infrequent such as use of the venue as a polling station or fortnightly community event)

Hereditaments are not a live music venue for the purpose of this relief if the property is wholly or mainly used as a nightclub or a theatre, for the purposes of the Town and County Planning (Use Classes) Order 1987 (as amended).

How much relief will be available

The eligibility for the relief and the relief itself will be assessed and calculated on a daily basis.

The following formula will be used to determine the amount of relief to be granted for a chargeable day for a particular hereditament in the 2026/27 financial year:

- a) Amount of relief to be granted = $V \times 0.15$ (i.e. 15% relief) where:
- V is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and certain other discretionary reliefs in line with guidance.

The relief is not subject to any cap or the Minimal Financial Assistance limit in Subsidy Control.

Supporting Small Business Relief

At the Autumn Budget 2025 the Chancellor announce the 2026 Supporting Small Business Relief scheme (SSBR) for the years 2026/27 to 2028/29.

This will cap bill increases at £800 per year or the relevant caps with transitional relief, whichever is the greatest for any business losing eligibility for certain reliefs, including Small Business Rate Relief and Rural Rate Relief, and 40% Retail, Hospitality and Leisure Relief at the 2026 Revaluation. SSBR was first introduced at the 2017 revaluation to support ratepayers facing bill increases greater than the Transition Relief caps due to loss of Small Business Rate Relief and Rural Rate Relief.

The purpose of this policy is to specify how the Council will operate its discretionary powers in the Local Government Finance Act 1988, section 47, and to indicate the factors the Council will consider when deciding if SSBR can be awarded.

Rugby Borough Council will automatically calculate and award the relief to those properties that meet the qualifying criteria and have seen a large increase in their bills as a result of losing some or all of their:

- Small Business Rate Relief or Rural Rate Relief,
- 40% Retail, Hospitality and Leisure Relief (RHL), and/or
- 2023 Support Small Business Relief. Charities and Community Amateur Sports Clubs, who are already entitled to 80% mandatory, are not eligible for the 2026 SSBR.

To support eligible ratepayer, the 2026 SSBR will ensure that the increase in the bills of these ratepayers is limited to £800 per year or the relevant caps within transitional relief, whichever is the greater.

For those ratepayers receiving 2023 SSBR on 31 March 2026, including those also receiving Small Business Rate Relief, Rural Rate Relief and/or RHL, any eligibility for 2026 SSBR will end of 31 March 2027.

All other eligible ratepayers remain in 2026 SSBR for either 3 years or until they reach the bill they would have paid without the scheme.

A change of ratepayers will not affect eligibility for the Supporting Small Business scheme, but eligibility will be lost if the property falls vacant or becomes occupied by a charity or Community Amateur Sports Club.

There is no second property test for eligibility for the 2026 SSBR scheme.

However, those ratepayers who during 2025/26 lost entitlement to Small Business Rate Relief, because they failed the second property test but have, under the rules for Small Business Rate Relief, been given a 12-month period of grace before their

relief ended (or from 27 November 2025, 3 years), can continue on the 2026 SSBR scheme for the remainder of their period of grace.

Small businesses rate relief or rural rate relief should not be applied to further reduce the bill if in receipt of SSBR.

For example:

- A non-RHL ratepayer eligible for small business rate relief whose rateable value has increased from £3,000 (paying £0 in 2025/26) to £14,000 would be paying the following in 2026/27 before the 2026 SSBR:

Bill before reliefs (including 1p Transitional Relief Supplement): £6,188 Bill after transitional relief: £1,572 Bill after small business rate relief: £1,048

- After 2026 SSBR the bill for 2026/27 would be reduced to £800.

No further small business rate relief should be applied and no addition for transition relief supplement is made to the bill within SSBR.

The same principle applies to properties for which a Section 44A certificate has been granted (apportionment of rateable values for partly occupied properties). The presence of a section 44A certificate should not further reduce the bill found under 2026 SSBR.

All other discretionary reliefs, including those funded by section 31 grants, should be considered after the application of 2026 SSBR.

Subsidy Control

The 2026 SSBR is likely to amount to a subsidy. Therefore, any relief provided by Rugby Borough Council under the scheme will need to comply with the UK's domestic and international subsidy control obligations which contains guidance and information for the new UK subsidy control regime.

To the extent that Rugby Borough Council is seeking to provide relief that falls below the Minimal Financial Assistance (MFA) thresholds, the subsidy control Act allows an economic actor, (e.g. a holding company and its subsidiaries) to receive up to £315,000 in a three-year period, consisting of the 2026/27 and the previous two financial years.

MFA subsidies cumulate with each other and with other subsidies that fall within the category of 'Minimal or Services of Public Economic Interest (SPEI) financial assistance'. Any other subsidies claimed under the Small Amounts of Financial Assistance limit of the Trade and Cooperation Agreement should be counted under the £315,000 allowance.

In those cases where it is clear to the local authority that the ratepayer is likely to breach the cash cap of the MFA limit then the Council will automatically withhold the relief.

Recalculation of Reliefs

As with other reliefs, the amount of SSBR awarded should be recalculated in the event of a change of circumstances.

This could include, for example, a backdated change to the rateable value or to the hereditament. This change of circumstances could arise during the year in question or during a later year.

Splits and Mergers

Hereditaments will be eligible for 2026 SSBR where they have:

- a) Come into existence because of the circumstances described in paragraph 1 of the 2026 Transitional Relief Regulations, and,
- b) Where one of the hereditaments from which the new hereditament was formed in whole or in part was for the day immediately before the creation day eligible for 2026 SSBR.

The Ministry of Housing, Communities and Local Government (MHCLG) will fund local authorities to apply a chargeable amount under section 47 of Local Government Finance Act 1988 found in accordance with the following principle:

- That the protection offered by 2026 SSBR (that the bill will not rise by more than £800 per annum, or the transitional relief caps whichever is the greater) will continue to apply in principle to that part of the newly created hereditament which was immediately before the creation day in 2026 SSBR, and,
- That increases (or reductions) in overall rateable value arising from the split or merger are not subject to the protection of 2026 SSBR. Detailed guidance for operation of the 2026 Support Small Business Relief (2026 SSBR)

Detailed guidance for the scheme, including day 1 eligibility rules, ceasing of eligibility for the scheme rules and the calculation of chargeable amounts under the scheme, are contained in the MHCLG guidance document at:

<https://www.gov.uk/government/publications/business-rates-relief-2026supporting-small-business-relief-local-authority-guidance>

How payments will be made

All relief awarded will be credited to the ratepayer's Business Rates account.

Overpayments

The Council will recover all overpayments of SSBR through the ratepayer's Business Rates account.

Right of Appeal

If a ratepayer is aggrieved by a decision made under this policy, you must write and tell us why you think the decision is wrong. Your case will be considered by someone who has not been involved in the original determination. They will write to tell you what has happened, normally within 7 days of reconsidering your appeal.

Fraud

The Council is committed to the prevention and detection of fraud and the protection of public funds. A ratepayer who tries to fraudulently apply for SSBR by falsely declaring their circumstances or providing a false statement will be referred to MHCLG for investigation which may result criminal proceedings being instigated.

Electric Vehicles Charging Points (EVCP) Relief

Eligibility:

Electric vehicle charging point relief is available for chargeable days in the financial years 2026/27 to 2035/36 for a hereditament which meets both of the following test for the chargeable days:

- a) Wholly or mainly consists of an electric vehicle charging point and associated bay(s) that are operations, energised, accessible and open to the public for public use.
- b) Classified by the Valuation Office (VO) as the site of an electric vehicle charging point (and associated bays) and falling within one of the following categories for electric charging points:
 - Separately assessed electric vehicle charging point and bays, which will have a dedicated Special Category code as defined by the VO.

The Council should have regard to the VOs Special Category (SCat) code 718 dedicated for EVCP sites when determining whether an EVCP is eligible for relief.

The relief is not available on sites where charging bays form part of a larger hereditament, and do not have a separate rateable value as assessed by the VO.

The relief is only available to occupied, eligible EVCP properties. To be eligible for relief the hereditament must be operational, energised, accessible and open to the public for public use. Relief is available where the above conditions are met. Where those conditions are not met or the hereditament is unoccupied then the hereditament will not be eligible for relief.

The total amount of government-funded relief available for each property for the relevant financial years under this scheme is 100% of the chargeable amount.

The relief will be applied after mandatory reliefs and other discretionary reliefs funded by section 31 grants have been applied, but before those where the council has used its wider discretionary relief powers introduced by the Localism Act 2011, which are not funded by section 31 grants.

However, as required in the National Non-Domestic guidance notes, the former categories of discretionary relief available prior to the Localism Act 2011 (i.e. charitable/CASC and not for profit) should be applied first in the sequence of discretionary reliefs, and therefore, before EVCP relief. Eligibility for the relief and the relief itself will be assessed and calculated on a daily basis.

The following formula should be used to determine the amount of relief to be granted for a chargeable day for a particular hereditament in the applicable financial year:

Amount of relief to be granted = $V \times 1.0$ where: V is the daily charge for the hereditament for the chargeable day after the application of any mandatory relief and certain other discretionary reliefs in line with the guidance. Backdating of EVCP relief Under the EVCP relief guidance, the Council should ensure that relief can be backdated to eligible EVCP hereditaments with effect from 1 April 2023.

This is to ensure that where new EVCP properties 12 have been added to the business rate list by the VO, that relief can be award in full, from the effective date. Subsidy Control EVCP relief awards are likely to amount to subsidies under the Subsidy Control Act (SCA).

On 6 May 2026, the government submitted a Competition and Markets Authority (CMA) referral for an assessment of the proposed Subsidy Scheme of Particular Interest. The Subsidy Advice Unit (SAU), a part of the CMA, published its report on 17 June 2026.

Under the Scheme, any business rates relief awards made in accordance with this guidance are judged to be consistent with the subsidy control principles.

This means that local authorities who satisfy themselves that an award complies with the guidance are not required to conduct their own assessment of the award against the subsidy control principles.

It also means that a subsidy awarded under the scheme that complies with this guidance is insulated from legal challenge under the SCA.

There is no cap to the value of a business rates relief award that can be made under the Scheme.

For avoidance of doubt, subsidies awarded under the Scheme do not constitute or contribute to Minimal Financial Assistance.

Local authorities will also have an obligation to report individual subsidies awarded under the scheme.

Subsidies about £100,000 awarded under this scheme are subject to transparency requirements.

This is not cumulated per beneficiary but applies per subsidy award.

This means that for every individual subsidy provided of more than £100,000, the council needs to include details of the subsidy on the subsidy control database and link that award to the Business Rates Relief for EVCPs subsidy scheme.

AGENDA MANAGEMENT SHEET

Report Title:	Annual Review of Progress on the Equality & Diversity Strategy 2025-2028
Name of Committee:	Cabinet
Date of Meeting:	3 November 2026
Report Director:	Monitoring Officer
Portfolio:	People, Resources and Governance
Ward Relevance:	All
Prior Consultation:	Equality & Diversity Work Group
Contact Officer:	Rebecca Ewers
Public or Private:	Public
Report Subject to Call-In:	Yes
Report En-Bloc:	No
Key Decision:	No
Corporate Priorities:	This report relates to the following priority(ies): ☒ A Healthier Rugby – To support people to live healthier, longer, and more independent lives. ☒ A Thriving Rugby – To deliver a thriving economy which brings Borough-wide investment and regenerates Rugby Town Centre. ☐ A Greener Rugby – To protect the environment and ensure the Borough adapts to climate change. ☒ A Fairer Rugby – To reduce inequalities and improve housing across the Borough. Corporate Strategy 2025-2035 ☐ This report does not specifically relate to any Council priorities
Summary:	To report on the progress of delivering the Equality & Diversity Strategy 2025-2028, and to request support in driving further progress in 2027 through actions from Cabinet.
Local Government Reorganisation Implications:	None at this stage

Financial Implications:	The recommendations have no direct costs but any costs arising, such as connected to recommendation 6, if any arise, they can be met from existing budgets.
Risk Management/Health and Safety Implications:	Failure to progress the Strategy would risk non-compliance with the public sector equality duty and associated reputational harm; the recommendations mitigate this by clarifying responsibility for delivery and by addressing training. No direct health and safety implications arise, save that the accessibility works improve safe access to Council buildings.
Environmental Implications:	None
Legal Implications:	The Council must have due regard to the matters in section 149 of the Equality Act 2010 (the public sector equality duty). Executive decisions taken under this report must fall within the scheme of delegation and the budget and policy framework: decision-making may be delegated only to a named officer or post, not to an advisory group (Part 2A 2.6 and 2.11), and any decision with financial consequences must accord with the budget (Part 3E Rules 5 and 7). There is no statutory requirement for councillors to complete equality and diversity training. The Council may encourage completion but cannot compel it (R (Taylor) v Honiton Town Council [2016] EWHC 3307 (Admin)). Councillor training and development is an executive portfolio responsibility (Part 2A 5.6(f)(v)); that responsibility covers the provision of training, not the direction of individual members. Recommendation 5 is therefore limited to noting the aggregate position and asking the Monitoring Officer to promote completion with group leaders. Members' understanding of the public sector equality duty nonetheless supports lawful decision-making, as those taking decisions on the Council's behalf must themselves be aware of the duty. This report does not identify any individual member and contains no exempt information. Information about individual members' completion will be shared only with group leaders, without reference to political party, and will be processed in accordance with UK GDPR.
Equality and Diversity:	The report has wide implications for equality and diversity and primarily relates to the Council showing due regard to the Equality Act (2010) and its other responsibilities to providing services to all

residents, taking consideration of their differing needs.

Options:

Option 1 (recommended) — approve the recommendations, enabling continued delivery of the Strategy with clear responsibility for the Action Plan and the training and funding actions routed correctly.

Option 2 — approve some but not all of the recommendations; delivery would continue but the specific barriers not addressed would remain.

Option 3 (not recommended) — make no decision; progress would be put at risk and the Council's ability to evidence due regard under the Equality Act 2010 would be weakened.

Recommendations:

- (1) The Quarter 4 progress report on the Equality & Diversity Strategy (Appendix 6) be approved for publication on the Council's website;
- (2) Cabinet endorses the establishment by the Corporate Equality & Diversity Officer of an advisory officer group, with no delegated decision-making authority, to support delivery of the Action Plan;
- (3) authority to agree the 2027 Action Plan and KPIs rest with the Corporate Equality & Diversity Officer, advised by that group, to be exercised within the approved budget and policy framework and recorded on the Monitoring Officer's register of delegations;
- (4) Cabinet requests that training on impact assessments be made available to all councillors through the member development programme, and encourage members to attend;
- (5) Cabinet notes that 10 of the Council's 42 councillors have yet to confirm completion of Equality & Diversity training, or equivalent training on the Council's statutory equality duties, and requests that the Monitoring Officer, working with group leaders, promote completion;
- (6) Cabinet supports the improvement of accessibility at WSU. This would start with an Access Audit being done to understand the level of work that needs to be completed and

allow a budget for the work to be scoped; and

- (7) Cabinet welcomes the arranging by the Corporate Equality & Diversity Officer of an Inclusive Leadership training session for the Leadership Team.

**Reasons for
Recommendation:**

- (1) The Equality & Diversity Strategy stated that the Council will publicly share progress to increase transparency.
- (2) To ensure that progress can continue towards targets in 2027, these additional supports will be needed.

Agenda No

Cabinet - 3 November 2026

Annual Review of Progress on the Equality & Diversity Strategy 2025-2028

Public Report of the Monitoring Officer

Recommendation

- (1) The Quarter 4 progress report on the Equality & Diversity Strategy (Appendix 6) be approved for publication on the Council's website;
- (2) Cabinet endorses the establishment by the Corporate Equality & Diversity Officer of an advisory officer group, with no delegated decision-making authority, to support delivery of the Action Plan;
- (3) authority to agree the 2027 Action Plan and KPIs rest with the Corporate Equality & Diversity Officer, advised by that group, to be exercised within the approved budget and policy framework and recorded on the Monitoring Officer's register of delegations;
- (4) Cabinet requests that training on impact assessments be made available to all councillors through the member development programme, and encourage members to attend;
- (5) Cabinet notes that 10 of the Council's 42 councillors have yet to confirm completion of Equality & Diversity training, or equivalent training on the Council's statutory equality duties, and requests that the Monitoring Officer, working with group leaders, promote completion;
- (6) Cabinet supports the improvement of accessibility at WSU. This would start with an Access Audit being done to understand the level of work that needs to be completed and allow a budget for the work to be scoped; and
- (7) Cabinet welcomes the arranging by the Corporate Equality & Diversity Officer of an Inclusive Leadership training session for the Leadership Team.

1. Introduction

- 1.1. The Cabinet voted to adopt the Equality & Diversity Strategy 2025-2028 in October 2025. In the Strategy, it stated that there would be an Annual report to Cabinet on progress towards the objectives listed therein. This would allow for accountability, but also for Cabinet to further support progress and remove barriers where necessary to allow for the success of the Strategy.

2. Background

- 2.1. The Strategy had an Action Plan attached to it; it contains KPIs that allow progress towards the objectives of the Strategy to be measured. Appendix 6 contains the quarter 4 report on this Action Plan, marking the one-year point since the Strategy was adopted by the Council.
- 2.2. There have been positive steps made in some areas, Appendices 3 and 5 show in detail the improvements in TIDE score from 2025 to 2026. TIDE is a self-assessment benchmarking tool to help embed and sustain an inclusive workplace culture. Our score moved from 53% to 62%, and the Council has been recognised with a Bronze TIDE Award for 2026.
- 2.3. The Council has reported on Ethnicity and Disability Pay Gaps this year for the first time ever. This is something that will become mandatory for all large employers in the future, so places the Council ahead of other similar organisations.
- 2.4. E-learning has been launched, alongside it mandatory training for staff on equality and diversity, as well as inclusive recruitment. This is additional training on top of the in-person training that is already provided. This has already seen a large number of staff completing the training, so is providing opportunity for greater knowledge across staff on best practice.
- 2.5. Works on improving the accessibility of the Town Hall have taken place as a result of an Access Audit completed on the building. This includes changes to signage, toilet seats, automatic doors and a stair lift being installed. This has greatly improved accessibility of the building and has had real impact on users. There are still further works planned to improve accessibility further, but 94% of the actions from the Audit have been progressed.
- 2.6. The Council have worked in partnership with Equip to launch a Disability Voice group for residents. This group engages with residents with disabilities or who are carers to raise issues locally. This group also invites organisations to attend who can help with positive action to resolve those issues. The group have successfully identified and had repairs done to pavement in Rugby that was hazardous. They have also engaged in a walkabout around the Town Centre to help identify how the Town Centre Regeneration could make Rugby more accessible.
- 2.7. Equality Impact Assessments have been changed to make the process more robust. This has included moving to a digital system, that improves tracking and recording as well as monitoring feedback better. There has also been training offered to all staff on Equality Impact Assessments to increase knowledge and understanding of the importance of these assessments in decision-making. Improving this process means that the needs of all residents are considered in decision-making process, and that Members are properly informed of the likely impact of their decisions.

3. Barriers

- 3.1. The Equality & Diversity Working Group receive quarterly updates on the progress of the Strategy. However, as they are not a decision-making group they cannot offer much support on progress. Therefore, it is proposed that the Corporate Equality & Diversity Officer launches a group of Officers who regularly attend meetings to progress the Strategy and to promote working across services. This will also raise awareness of the Strategy among Officers.
- 3.2. Officers have increased knowledge of how to write meaningful Equality Impact Assessments. However, Councillors have not had similar opportunities to learn about how to use them in effective decision-making. Corporate Equality & Diversity Officer to arrange training on Impact Assessments, Cabinet to encourage attendance from all Councillors.
- 3.3. Some councillors have yet to confirm that they have completed the Equality and Diversity Training for Councillors, despite several reminders. The Corporate Equality & Diversity Officer, with support from the Working Group, has explored several ways of encouraging completion, and most members have now completed the training. As at 23 October 2026, 10 of the Council's 42 councillors had yet to confirm completion. An updated figure, reflecting confirmations received by 27 October 2026, will be reported at the meeting. Completion is encouraged rather than required by statute. To support it, Legal and Governance will offer a session focused on the Equality Act 2010 and the public sector equality duty, which will be accepted as equivalent to the LGA workbook. The Monitoring Officer will share the position confidentially with group leaders, without reference to political party, so that they can encourage the remaining members to complete the training. Any member who wishes to have their reasons for non-completion recorded may do so.
- 3.4. Budget for accessibility works has been a barrier. The next phase of audits will look at WSU, an access audit will be used to scope the work and create a budget. Budget for this work will be requested to be approved by Council after the extent of works needed is known.
- 3.5. Although the Council's TIDE Score has improved significantly, the score on the section on Inclusive Leadership has seen no significant change. To support an increase in Inclusive Leadership, and to understand its importance, ask that the Leadership Team take part in a training session on this topic.

4. Conclusion

- 4.1. Significant progress has been made towards objectives. However, there are barriers to further progress that need addressing. Some of these barriers can be removed by the approval of all of the recommendations.

Name of Meeting: Cabinet

Date of Meeting: 3 November 2026

Subject Matter: Equality & Diversity Strategy

Originating Department: Chief Executive's Directorate

DO ANY BACKGROUND PAPERS APPLY

☒ **YES**

☐ **NO**

LIST OF BACKGROUND PAPERS

Doc No	Title of Document and Hyperlink
Appendix 1	Equality Impact Assessment
2	Annual Workforce Equality Report 2025
3	TIDE Report 2026
4	Annual Workforce Equality Report 2024
5	TIDE Report 2025
6	Q4 Report

The background papers relating to reports on planning applications and which are open to public inspection under Section 100D of the Local Government Act 1972, consist of the planning applications, referred to in the reports, and all written responses to consultations made by the Local Planning Authority, in connection with those applications.

☒ Exempt information is contained in the following documents:

Doc No	Relevant Paragraph of Schedule 12A
N/A	None – this report contains no exempt information

Appendix 1

EQUALITY IMPACT ASSESSMENT (EqIA)

Annual Review of Progress on the Equality & Diversity Strategy 2025-28

For Cabinet on 3 Nov 2026

Approved by	John Murphy
Policy being assessed	Annual Review of Progress on the Equality & Diversity Strategy 2025-28
Service Area	Legal & Governance
Name of Officer completing the assessment	Rebecca Ewers
Other Officers involved	
Date of this assessment	7 Oct 2026
Date of review	1 Oct 2027

<u>Stage 1 – Policy to be analysed</u>	
(1) Describe the main aims, objectives and purpose of the Policy?	To report on the progress of delivering the Equality & Diversity Strategy 2025-2028, and to request support in driving further progress in 2027 through actions from Cabinet.
(2) How does it fit with Rugby Borough Council's Corporate priorities and your service area priorities?	• A Healthier Rugby - to support people to live healthier, longer and more independent lives. The strategy supports working with community groups and key stakeholders to improve access to health and wellbeing promoting behaviours, such as access to green spaces and leisure facilities. Additionally, prioritising mental health and wellbeing in the workplace for all staff. • A Thriving Rugby - to deliver a thriving economy which brings borough-wide investment and regenerates the town centre Ensuring that investment in the borough and regeneration of the town centre is done with the collaboration of the diverse communities of Rugby, considering the impact of investments on equality and inclusion, making sure that Rugby is a thriving place for all residents. This will be achieved through the use of Equality Impact Assessments as part of the decision-making process of the Council. • A Greener Rugby - to protect the environment and ensure the borough adapts to climate change Climate change tends to more greatly impact those who are most socio-economically disadvantaged. Protecting the environment and making sure that the borough is prepared for the impact of climate change will help reduce inequalities. • A Fair Rugby - to reduce inequalities and improve housing across the borough The strategy aims to ensure equality of opportunity for all staff and residents. This will be achieved by embedding equality and inclusion into all functions of the Council, making the Borough a fair place for all employees and residents.



(3) What are the expected outcomes you are hoping to achieve?	1. Objective 1 – An engaged and diverse workforce Improving staff data collection to ensure that RBC has the necessary data to plan effectively and meet workforce needs. Ensure a fair and inclusive processes at all stages in the employee cycle. Engage with staff surveys and demonstrate that their voice has impact through making changes based on feedback. 2. Objective 2 – Creating an inclusive work environment Provide adequate ongoing training for staff to ensure that they understand their role in creating an inclusive work environment. Working to make sure that all buildings and working practices are inclusive and accessible. Engaging with Mental Health First Aiders and Employee Network Group to ensure that RBC is an inclusive place to work and provide a forum to raise issues. 3. Objective 3 – Understanding our customers and residents Collecting the necessary data to monitor our services and ensure that they meet the needs of our residents. Also to help us to understand who our customers are. Creating a cultural competency toolbox to help employees and Councillors understand and work better with the wider community. Supporting Members through providing Equality & Diversity training to help them to engage with their constituents effectively and with understanding. 4. Objective 4 – Monitoring the impact of services Create a culture where the impact of the Council's policies/strategies/services are monitored and reviewed. Making sure that the Council is using equality data and consultation to inform decision making.
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(4) Does or will the policy affect: • Customers • Employees • Wider community or groups	Customers, Employees, Wider Community or Groups • Customers Aims to improve customer experience by ensuring that the needs of all customers are considered in service design. Making sure that all customers have access to services. • Employees Improve engagement with employees to identify any concerns and make sure that the Council is a fair and inclusive workplace. • Wider community or groups Increase engagement with the wider community in Rugby when planning services. To help the Council understand the differing needs of its diverse population.
(5) Will the policy involve substantial changes in resources?	No
(6) Is a full Equality Impact Assessment needed? If no, please give reason why.	Yes



(7) Please describe how the policy will meet the aims of the Equality Duty: a. Eliminate unlawful discrimination, harassment, victimisation and any other unlawful conduct prohibited by the act b. Advance equality of opportunity between people who share and people who do not share a relevant protected characteristic c. Foster good relations between people who share and people who do not share a relevant protected characteristic	a) Ensure that all members of staff are aware of their duty under the Equality Act and consider the impact on service and policy design. Staff will complete Equality Impact Assessment training to ensure that they can use impact assessments to identify and eliminate discrimination, harassment and victimisation using them. b) Advance equality of opportunity for staff by monitoring diversity data of employees to identify where there are differences in opportunity and using this to change practices. Removing barriers to accessing services so that everyone has the opportunity to participate/access services. c) Foster good relations between groups by engaging with all residents so that we can understand their needs and key issues better. Allowing us to build strong and empowered communities where everyone feels heard.
<u>Stage 2 – Evidence about user population and consultation</u>	
(1) What does the data tell you about the groups this policy impacts?	Annual Workforce Report 2024 The Workforce Report identified a low disclosure rate of staff equality data. It also identified some areas where there were potential differences in opportunities for groups. This data is being used to find areas where changes in practice could improve equality of opportunity for all (potential) employees. Talent Inclusion and Diversity Evaluation (TIDE) Report 2025 The TIDE Report places RBC at the Implement stage of our inclusion journey. To progress we need to identify and assign EDI responsibilities and secure ongoing leadership commitment. We need to build a framework to successfully deliver the Equality & Diversity Strategy to promote a more inclusive working environment for all. The lowest scoring sections on the report were: Inclusive Leadership, Strategy & Planning and Diversity Data Monitoring. The strategy therefore aims to address these weaker areas by increasing accountability, involving leadership in EDI and improving our Diversity Data Monitoring practices.

Additional evidence can be found:	Appendix 5 - TIDE Report 2025.pdf Appendix 4 - Annual_Workforce_Equality_Report_2024.pdf		
(2) Have you consulted or involved those groups that are likely to be affected by the policy you want to implement? If yes, please state which groups were involved in the consultation and what were their views and how have their views influenced the policy? If you have not consulted or engaged with communities that are likely to be affected by the policy, give details about when you intend to carry out consultation or provide reasons for why you feel this is not necessary	Yes The development of the strategy was consulted on with the following: Internal consultation: • Presented to the Equality & Diversity Steering Group • Presented to the Leadership team • Internal communication with all employees providing the strategy and feedback form • Opportunity for in-person forum and possibility to ask questions External consultation: • Sent out the strategy and feedback form through external communications • Engaged directly with a list of external stakeholders The Equality & Diversity Working Group have been kept updated on progress with quarterly reports.		
Stage 3 – Analysis of impact			
(1) <u>Protected Characteristics</u> From your data and consultations, are there any positive or negative impacts identified for any particular group? If left blank, this means that no impacts have been identified for this group.	Protected Characteristic	Nature of Impact Positive, Negative, Both	Explain why
	Age	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
	Disability	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.



	Sex	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
	Gender reassignment	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
	Marriage/civil partnership	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
	Pregnancy/maternity	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
	Race	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
	Religion/belief	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
	Sexual Orientation	Positive	The strategy will support equality, diversity and inclusion practices across all protected characteristics.
(2) <u>Cross cutting themes</u>	Description of impact	Nature of impact Positive, Negative, Both	Explain why



	Socio-economic e.g.: child poverty, income level, education level, working hours/occupation, family/social support, access to good nutrition	Positive	In addition to the protected characteristics, the Council will consider the impact of socio-economic factors on how residents are able to access services.
	Environmental e.g.: housing status, transport links, geography, access to services, air quality, noise pollution	Positive	In addition to the protected characteristics, the Council will consider the impact of environmental factors on how residents are able to access services.
(4) Are there any barriers to accessing the service? If yes, how can they be overcome?	Yes Barriers are awareness of the strategy and accountability. The strategy will be made publicly available on our website, alongside annual report of progress. It will be communicated internally, and leadership team will be discussing progress of the strategy with the Corporate Equality & Diversity Officer. Awareness of the Strategy will be built into the onboarding process, so that all members of staff are aware of their roles and responsibilities.		
(5) What data will be collected to analyse impact? How will the data collected be used?	Through Annual Workforce Equality Reports – specifically looking to increase disclosures initially. The TIDE Report will be repeated annually and progress on this report will be monitored with an aim to move towards the embed level. Additionally, results of the Annual Staff Survey will be used to monitor progress. Progress will be reported annually and measured against KPIs from the Action Plan. We will also collect feedback from external partners on our engagement with them – and monitor complaints for incidents of customers/residents experiencing discrimination.		

(6) Complete this section if any adverse impacts were identified in 3.1. Outline any actions that will be taken to remove or mitigate the adverse impacts identified in 3.1 to ensure that no discrimination is taking place. If removing or mitigating the impact is not possible, you may in certain circumstances, justify the discrimination. If that is the case, please give evidence for why justifying is possible in this case.	
Stage 5 – Review not to be completed on initial assessment	



(1) What evidence of impact has been collected?	Appendix 2 – Annual Workforce Report 2025 Some of the Key Findings from the report were: • A slight increase in data disclosure • A reduction in employees of Black or Black British ethnic origin • Female employees far more likely to be part time than males • Female employees are more likely to be paid at Grade G or above than males • White applicants were more likely to be successfully appointed to a role than those of other ethnic origins, a similar trend can be seen with promotions • Male applicants were more likely to be successfully appointed to a role than females • Those with a disability were more likely to be successfully appointed to a role than those without a disability, showing the positive impact of the Disability Confident Employer Scheme • Those of White ethnic origin are less likely to leave employment with the Council than those of other ethnic groups • Males are more likely to leave employment with the Council than females • Negative Gender Pay Gap, meaning that female employees receive more take home pay than males on average *Due to small number of employees at RBC, and the fact that many of these data sets have not been reported on prior to 2024, there are limited conclusions that may be drawn from some of this data. This data is not used in isolation, rather to build up a wider context and to help us to identify trends over time. Appendix 3 – Talent Inclusion and Diversity Evaluation (TIDE) Report The report for 2026 shows improvement in most areas, and overall an increase in score to 62% and an embed score. Additionally, RBC has been recognised with a Bronze TIDE Award. The biggest improvement has been in the Strategy & Planning section. There has been little movement in the Inclusive Leadership section. Appendix 6 - Action Plan and Report 2026 This document shows the KPIs for 2026, and shows reported progress towards targets. These targets were created based on the strategy.
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Additional evidence can be found:	Appendix 3 - TIDE Report 2026.pdf Appendix 2 - Annual Workforce Equality Report 2025 FINAL.pdf
(2) Were the impacts as expected from the original EqIA?	It is clear that there has been positive progress towards KPIs, in particular the improvements to EqIA process and provision of training should improve services to residents across Rugby. However, this is early in the changes to approach and strategy from RBC, so at this point there are not many measureable impacts on residents. There have been improvements on the accessibility of the Town Hall as a result of the Strategy, which is a positive impact for the protected characteristics Disability and Age (to a lesser extent). The launch of the Disability Voice group is also having a positive impact on residents with the protected characteristic of Disability. Training provided to staff on Dignity at Work, Inclusive Recruitment and Impact Assessments has upskilled and developed our staff to support an inclusive work environment, and delivering our services with the impact of how they are designed better considered.
(3) Will there be any changes made as a result of this review?	The establishment by the Corporate Equality & Diversity Officer of an advisory officer group, with no delegated decision-making authority, to support delivery of the Action Plan. To set the 2027 Action Plan and KPIs based on current progress and objectives. Deliver training on Impact Assessments be made available to all Councillors. And to follow up on Councillors who are yet to complete the Equality & Diversity training. Complete an Access Audit of WSU to understand the level of work that needs to be completed and allow a budget for the work to be scoped. Arrange an Inclusive Leadership training session for the Leadership Team.

Summary

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Rugby Borough Council – Annual Workforce Equality Report 2025

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1. Introduction

The Annual Workforce Equality Report is an important resource that will help shape how we approach workforce activity over the coming year. It will help us to understand trends across the protected characteristics, provide understanding of our workforce and help us to monitor the impact of policies.

This report provides an analysis of the Council's directly employed workforce over the 12-month period 1st January 2025 to 31st December 2025. The data used covers all permanent and fixed term employees. The data used in this report has been taken from the Council's Human Resources Information Systems and reflects the information you have declared. Where small numbers apply, data may not have been reported or detail reduced to ensure that no individual can be identified.

Where appropriate, the data is compared to Census 2021 figures for Rugby, this allows us to determine if the employees of the Council are representative of the residents of Rugby.

The information from this report will be used in a variety of ways across the Council including:

- Monitoring inequalities
- Information source for Equality Impact Assessments
- Identifying Learning & Development requirements
- Providing an evidence base for the Equality & Diversity and People Strategies
- Assisting workforce planning, recruitment and retention strategies

2. Key Findings

A summary of the data from 2025, this data alone cannot determine the cause of these differences, and due to a small workforce, some of these findings may not be significant. However, they may be used alongside more detailed information to help build a picture and determine if there are any interventions that the Council can reasonably put in place to ensure equality of opportunity throughout the employment lifecycle.

- A slight increase in data disclosure
- A reduction in employees of Black or Black British ethnic origin
- Female employees far more likely to be part time than males
- Female employees are more likely to be paid at Grade G or above than males
- White applicants were more likely to be successfully appointed to a role than those of other ethnic origins, a similar trend can be seen with promotions
- Male applicants were more likely to be successfully appointed to a role than females
- Those with a disability were more likely to be successfully appointed to a role than those without a disability, showing the positive impact of the Disability Confident Employer Scheme
- Those of White ethnic origin are less likely to leave employment with the Council than those of other ethnic groups
- Males are more likely to leave employment with the Council than females
- Negative Gender Pay Gap, meaning that female employees receive more take home pay than males on average

3. Number of employees in post

a. By ethnic origin

Ethnic Origin	Count	%
Any other Black background	1	0.21%
Any other ethnic group	1	0.21%
Any other Mixed background	2	0.42%
Any other White background	8	1.66%
Asian or Asian British - Indian	13	2.70%
Asian or Asian British - Pakistani	6	1.25%
Black or Black British - African	4	0.85%
Black or Black British - Caribbean	2	0.42%
Chinese	1	0.21%
Mixed - White and Asian	4	0.85%
Mixed - White and Black African	1	0.21%
Mixed - White and Black Caribbean	3	0.62%
White - British	401	83.37%
White - Irish	4	0.85%
White - Other	19	3.95%
(blank)	11	2.29%
Grand Total	481	

It can be difficult to draw conclusions from ethnic origin data as the numbers identifying in some groups are very small, a clearer picture can be given through examining ethnic groupings. This data can be compared with 2021 census data for Rugby; this allows us to determine if the employees of Rugby Borough Council are representative of the wider community. There has been no significant change in the number of employees from 2024.

Ethnic groupings	Count	%	Census Data
Asian or Asian British	19	3.95%	7.6%
Black or Black British	7	1.46%	2.7%
Mixed	10	2.08%	2.8%
Other Ethnic Groups	2	0.42%	1.1%
White	432	89.81%	85.7%
(blank)	11	2.29%	
Grand Total	481		

The only significant change from 2024 data is a decrease in the number of employees from Black or Black British ethnic groups. Those of Asian and Black ethnic groups are underrepresented in the workforce. There has been a significant decrease in the number of employees from Black or Black British ethnic origin since 2024.

b. By Disability

Disability Status	Count	%	Census Data
Disabled	63	13.09%	16.2%
Not disabled	394	81.91%	83.8%
Not known	10	2.08%	
Prefer not to say	2	0.42%	
(blank)	12	2.49%	
Grand Total	481		

There has been an increase in responses in this section since 2024. With a slightly lower percentage of employees than the census data, however due to non-reports and non-disclosures, the actual number could be different. The Council are working to continue to improve this data in the coming year, and it has already improved slightly since 2024.

c. By Sex

Sex	Count	%	Census data
Female	203	42.20%	50.3%
Male	278	57.80%	49.7%
Grand Total	481		

There are still significantly more males employed at the Council than females.

d. By age

Age	Count	%
<25	26	5.41%
25-34	93	19.33%
35-44	107	22.25%
45-54	111	23.08%
55-64	124	25.78%
65-74	20	4.16%
Grand Total	485	

42.2% of RBC's workforce is over the age of 50, whereas in the UK 33% of the workforce are over 50. The median age of the workforce is 46 years.

e. By religion

Religion	Count	%	Census data
Buddhist	1	0.21%	0.4%
Christian	177	36.80%	50.5%
Hinduism	6	1.25%	3.3%
Muslim	9	1.87%	1.8%
None	186	38.67%	36.1%
Other	16	3.33%	0.5%
Prefer not to say	24	4.99%	5.9%

Sikh	3	0.63%	1.4%
(blank)	59	12.27%	
Grand Total	481		

Significant decrease in the number of non-respondents to this question. Still large enough to limit the conclusions that can be drawn from this data and cannot provide much meaningful data. It does suggest that Christians may be underrepresented in the workforce.

f. By sexual orientation

Sexual Orientation	Count	%	Census data
Bisexual	6	1.25%	1.06%
Declined to specify	23	4.78%	6.96%
Gay or Lesbian	7	1.46%	1.16%
Heterosexual or straight	396	82.33%	90.50%
Other	4	0.83%	0.28%
(blank)	45	9.36%	
Grand Total	481		

The number of responses has increased since 2024, however there are still a lot of nonrespondents so the data still cannot be used further to draw any meaningful conclusions.

4. Number of employees in part time roles

Employment type	Count	%
full time	401	82.34%
part time	86	17.66%
Grand Total	487	

Rugby has a significant number of employees in part-time roles, it is useful to examine the characteristics of those in part-time roles to determine if there is an impact on employment opportunities for particular groups. In this context, part-time is any employee who works fewer than 37 hours a week.

a. By ethnic origin

	Full Time		Part Time	
Ethnicity	Count	%	Count	%
(blank)	11	2.74%	0	0.00%
Asian or Asian British	13	3.24%	6	6.98%
Black or Black British	6	1.50%	1	1.16%
Mixed	6	1.50%	4	4.65%
Other Ethnic Groups	1	0.25%	1	1.16%
White	364	90.77%	74	86.05%
Grand Total	401		86	

Those of Asian or Mixed ethnic origin are more likely to be employed part-time. However, as these groups are small, it is difficult to determine if this is significant. However, this is the same pattern as recorded in the 2024 data.

b. By disability

	Full Time		Part Time	
Disability status	Count	%	Count	%
(blank)	12	2.99%	0	0.00%
No	327	81.55%	73	84.88%
Not Known	11	2.74%	1	1.16%
Yes	51	12.72%	12	13.95%
Grand Total	401		86	

No significant difference between disability status and likelihood of being employed full or part time.

c. By sex

	Full Time		Part Time	
Sex	Count	%	Count	%
Female	145	36.16%	64	74.42%
Male	256	63.84%	22	25.58%
Grand Total	401		86	

Female employees are more likely to be employed part time than male employees and vice versa. This is a significant difference, and a trend observed nationally.

d. By age

	Full Time		Part Time	
Age	Count	%	Count	%
<25	20	5.00%	6	6.90%
25-34	84	21.00%	10	11.49%
35-44	85	21.25%	26	29.89%
45-54	88	22.00%	23	26.44%
55-64	108	27.00%	17	19.54%
65-74	15	3.75%	5	5.75%
Grand Total	401		86	

There is no clear trend in age and full/part time employment

5. Number of employees in pay grade

Pay grade	Count	%
Grade F and below	405	83.16%
Grade G and above	82	16.84%
Total	487	

The split in pay grades was chosen as management level positions are paid at grade G and above, this pay grade indicates higher pay, experience and qualifications. The count differs from the total number of employees as a few members of staff hold more than one permanent role, but at different pay grades.

a. By ethnicity

	Grade F and below		Grade G and above		Total	
Ethnicity	Count	%	Count	%	Count	%
(blank)	8	1.98%	3	3.66%	11	2.26%
Asian or Asian British	16	3.95%	3	3.66%	19	3.90%
Black or Black British	6	1.48%	1	1.22%	7	1.44%
Mixed	8	1.98%	2	2.44%	10	2.05%
Other Ethnic Groups	2	0.49%	0	0.00%	2	0.41%
White	365	90.12%	73	89.02%	438	89.94%
Grand Total	405		82		487	

There is no significant difference between Ethnic groupings and their likelihood of being in a higher pay grade.

b. By disability

	Grade F and below		Grade G and above		Total	
Disability Status	Count	%	Count	%	Count	%
(blank)	10	2.47%	2	2.44%	12	2.46%
No	329	81.23%	71	86.59%	400	82.14%
Not Known	12	2.96%	0	0.00%	12	2.46%
Yes	54	13.33%	9	10.98%	63	12.94%
Grand Total	405		82		487	

Those without a disability are slightly more likely to be paid at Grade G and above. This data should be analysed alongside the Disability Pay Gap data for further detail about differences in pay between these groups.

c. By sex

	Grade F and below		Grade G and above		Total	
Sex	Count	%	Count	%	Count	%
Female	165	40.74%	44	53.66%	209	42.92%
Male	240	59.26%	38	46.34%	278	57.08%
Grand Total	405		82		487	

Female employees are more likely to be paid a Grade G and above than male employees. This can be analysed alongside the Gender Pay Gap for a further breakdown of pay differences.

d. By age

	Grade F and below		Grade G and above		Total	
Age	Count	%	Count	%	Total	%
<25	26	6.42%	0	0.00%	26	5.34%
25-34	85	20.99%	9	10.98%	94	19.30%
35-44	93	22.96%	18	21.95%	111	22.79%
45-54	79	19.51%	32	39.02%	111	22.79%
55-64	105	25.93%	20	24.39%	125	25.67%
65-74	17	4.20%	3	3.66%	20	4.11%
Grand Total	405		82		487	

Those who are older are more likely to be paid at Grade G and above, however this is most likely due to the greater level of experience required to be in this grade.

6. Training

In 2024, there were 1090 recorded training sessions across the organisation. In 2025, this number was 1642 training sessions participated in by 488 distinct people, this means that many people were engaging in training several times across the year. We are examining all training sessions, rather than distinct people, as this allows us to see who is in receipt of more training opportunities. Most employees will receive some form of mandatory training at some point in the year, therefore counting distinct people receiving training would broadly match the employee data.

These numbers only account for in person training attended on site, this does not include online learning, which was launched late in 2025, or training provided elsewhere. The Council runs a future leaders programme; however, the numbers enrolled on this programme are too small to analyse.

a. By ethnic origin

Ethnic group	Number of instances of training	% of training	% of workforce
Asian or Asian British	53	3.2	3.95
Black or Black British	47	2.9	1.46
Mixed	53	3.2	2.08
Other Ethnic Groups	1	0.1	0.42
White	1448	88.2	89.81
(blank)	40	2.4	2.29

There is no significant difference in participation in training between ethnic groups.

b. By disability

Disability Status	Number of instances of training	% of training	% of workforce
No	1351	82.3	81.91
Not Known	49	3.0	2.08
Yes	217	13.2	13.09
(blank)	25	1.5	2.91

There is no significant difference in participation in training between those with and without a disability.

c. By sex

Sex	Number of instances of training	% of training	% of workforce
Female	903	55.0	42.20
Male	739	45.0	57.80
Grand Total	1642		

Females participate in training at a higher rate than males.

d. By age

Age	Number of instances of training	% of training	% of workforce
<25	121	7.37	5.41
25-34	362	22.05	19.33
35-44	370	22.53	22.25
45-54	394	24.00	23.08
55-64	363	22.11	25.78
65-74	32	1.95	4.16
Grand Total	1642		

There is no significant difference in participation in training between those in different age groups.

7. Number of applicants/shortlisted/appointed

In 2025, RBC received 1578 applications for job roles, of which 86 were appointed, this is double the figures from 2024. This section will look at the success rates of those of different protected characteristics to examine if there are any differences. The Council is a Disability Confident Employer and uses the Guaranteed Interview Scheme for those applicants who declare a disability and meet the minimum essential requirements for the job role. Additionally, the Council holds a Defence Employer Recognition Scheme (DERS) Bronze award, we do not currently analyse data on veteran status of applicants due to the low numbers of applicants from this group. Applicants' information is anonymised, where appropriate, to lessen the risk of bias entering the process.

Towards the end of 2025, RBC launched e-learning, with mandatory training on inclusive recruitment for all managers to complete in response to the 2024 data. The impact of this intervention will be able to be examined in the 2026 data.

Where the overall application count varies, is where an applicant has not shared that particular protected characteristic data with us, so they are removed from the overall analysis for that data set.

a. By ethnic origin

Ethnic Origin	Applied	Shortlisted	Appointed	Candidate withdrawn	Total	% Shortlisted	% Appointed
Asian or Asian British	293	27	4	12	336	9.22	1.19
Black or Black British	169	13	4	4	190	8.95	2.11
Mixed	32	2	5	1	40	17.50	12.50
Other	37	3	0	4	44	6.82	0.00
White	751	81	73	62	967	15.93	7.55
Total	1282	126	86	83	1577	13.44	5.45

The success rate of applicants from White ethnic origins are far higher than those of other backgrounds, this is noticeable at all stages but is most pronounced after shortlisting. The data set for those of Mixed ethnic origin is small, so can be considered not significant. This shows the same trend as the data in 2024, with those of White ethnic origin having a higher success rate than other groups.

b. By disability

Disability Status	Applied	Shortlisted	Appointed	Candidate withdrawn	Total	% Shortlisted	% Appointed
No	1145	101	69	78	1393	12.20	4.95
Not Known	65	8	6	0	79	17.72	7.59
Yes	72	17	10	5	104	25.96	9.62
Total	1282	126	85	78	1576	13.40	5.39

Those with a disability are more likely to be shortlisted than other candidates, this is due to being a Disability Confident Employer scheme, this in turn sees a higher success rate for applicants with a disability.

c. By sex

Sex	Applied	Shortlisted	Appointed	Candidate withdrawn	Total	% Shortlisted	% Appointed
Female	654	65	30	36	785	12.10	3.82
Male	619	60	56	46	781	14.72	7.17
Unspecified	9	2	0	1	12	16.70	0.00
Total	1282	127	86	83	1578	13.50	5.45

Though similar rates of shortlisting, male candidates were far more likely to be appointed than females. This is a large change from 2024, where success rates were the same for male and female candidates.

d. By age

Age	Applied	Shortlisted	Appointed	Candidate withdrawn	Total	% Shortlisted	% Appointed
<25	169	13	14	12	208	12.98	6.73
25-34	475	35	22	23	555	10.27	3.96
35-44	318	33	15	19	385	12.47	3.90
45-54	177	27	22	16	242	20.25	9.09
55-64	136	18	12	13	179	16.76	6.70

65-74	7	0	1	0	8	12.50	12.50
Total	1282	126	86	83	1577	13.44	5.45

There is no clear pattern between likelihood of being appointed and age.

8. Number of employees promoted

During 2025, 20 employees were offered promotions within RBC. This section will look at the outcomes for applicants for promotion, and success rate of different backgrounds to see if there is any difference. It is important to note that due to the small number of promotions, the data can offer limited insights. There were 44 promotions in 2024, so there is a much smaller data set for 2025.

a. By ethnic origin

Ethnic Group	Applied	%	Shortlisted	%	Promoted	%
Asian or Asian British	97	25.19	8	14.29	0	0.00
Black or Black British	38	9.87	2	3.57	1	5.00
Mixed	8	2.08	1	1.79	0	0.00
Other	6	1.56	1	1.79	0	0.00
White	232	60.26	43	76.79	19	95.00
Prefer not to say	4	1.04	1	1.79	0	0.00
Total	385		56		20	

Those of White ethnic origin are more likely to receive a promotion than any other ethnic group. This shows the same pattern as the data from 2024.

b. By disability

Disability Status	Applied	%	Shortlisted	%	Promoted	%
Disabled	24	6.23	9	16.07	1	5.00
Not Disabled	360	93.51	46	82.14	18	90.00
Prefer not to say	1	0.26	1	1.79	1	5.00
Total	385		56		20	

Although there are similar percentages of applicants and those being promoted from each group, there is an underrepresentation of disabled applicants for promotions. The workforce data states that 13.09% of employees report having a disability, but only 6.23% of applicants for promotion are.

c. By sex

Sex	Applied	%	Shortlisted	%	Promoted	%
Female	185	48.05	31	55.36	9	45.00
Male	197	51.17	24	42.86	11	55.00
Prefer not to say	3	0.78	1	1.79	0	0.00
Total	385		56		20	

Success rates between male and female applicants are similar, the higher number of male applicants is most likely due to a higher number of male staff employed at the

Council. This shows a reversing of the trend from 2024, suggesting that the link may be more due to which job roles have promotion opportunities in a given year.

d. By age

Age	Applied	%	Shortlisted	%	Promoted	%
Under 21	1	0.26	0	0.00	0	0.00
21 - 30	98	25.45	4	7.14	3	15.00
31-40	124	32.21	20	35.71	9	45.00
41-50	91	23.64	13	23.21	4	20.00
51-60	55	14.29	13	23.21	4	20.00
over 60	15	3.90	5	8.93	0	0.00
Prefer not to say	1	0.26	1	1.79	0	0.00
Total	385		56		20	

Those most likely to be successful in receiving a promotion were between the ages of 31-40. Notably, no one over 60 was successful in receiving a promotion. This is similar to the data for 2024, where older employees were less likely to receive a promotion.

9. Number of employees leaving

A total of 85 employees left employment with the Council during 2025. This is similar to numbers in previous years. This number does not include casual employees. Comparative data used for this section, is the total number of employees in these groups to see if they are represented similarly in both the leavers and employees as a whole.

a. By ethnic origin

Ethnic Origin	Count	%
Asian or Asian British	6	7.06%
Black or Black British	6	7.06%
Mixed	1	1.18%
Not disclosed	5	5.88%
White	67	78.82%
Grand Total	85	

Those of White ethnic origin represent 89.81% of employees, so are underrepresented in leavers. However, due to the small data set, this is not conclusive. This shows broadly similar trends to 2024, where those of White ethnic origin are less likely to leave employment with the Council than other groups. This data needs to be further examined alongside exit interviews.

b. By disability

Disability Status	Count	%
Not disclosed	5	5.88%
No	60	70.59%
Not Known	3	3.53%
Yes	17	20.00%
Grand Total	85	

13.09% of employees state that they have a disability, whereas 20% of leavers do. This is quite a bit higher, therefore should be analysed alongside exit interviews to try and determine if there is any probable cause. There is a shift in data here from 2024, with an increase in the percentage of leavers having a disability, this could be due to the relatively small data set and may not be an ongoing trend.

c. By sex

Sex	Count	%
Female	28	32.94%
Male	57	67.06%
Grand Total	85	

Male employees were far more likely to leave employment with the Council during 2025 than female employees. This is a large change from 2024 data, where 49.44% of leavers were male, this needs to be examined alongside exit interviews and other data to determine if there are any causes for this large shift.

d. By age

Age	Count	%
<25	3	3.53%
25-34	16	18.82%
35-44	19	22.35%
45-54	16	18.82%
55-64	21	24.71%
65-74	10	11.76%
Grand Total	85	

Those over 65 were more likely to leave employment in 2025 than other groups, this is most likely due to retirement, so not a cause for further investigation.

10. Employees subject to disciplinary procedure

During 2025, 11 employees were subject to disciplinary procedures. This is in line with the 2024 report, where 15 disciplinaries were reported. Without context and with such a small data set, it is difficult to draw conclusions.

a. By ethnic origin

Ethnic Group	Count
Asian or Asian British	1
Mixed	1
White	9

b. By disability

Disability Status	Count
Disabled	1
Not disabled	10

c. By sex

Sex	Count
Female	3
Male	8

11. Employees who have raised a grievance

During 2025, 17 employees raised a grievance, not all of these were successfully upheld. In 2024 there were 16 grievances recorded. This is a small data set and has no context as to what the grievances are related to, so few conclusions can be drawn. However, those who raised a grievance were more likely to be white and female. In 2024, those raising grievances were more likely to be white, male and over 55. No clear conclusions can be drawn from this data without further context.

a. By ethnic origin

Ethnic Origin	Count
Asian or Asian British	1
White	16

b. By disability

Disability Status	Count
Disabled	2
Not disabled	14
NULL	1

c. By sex

Sex	Count
Female	10
Male	7

12. Gender Pay Gap

Rugby Borough Council reported a negative pay gap for 2025; this means that, on average, female employees were paid more per hour than males. Looking at the quartile breakdown, this is likely due to a higher number of male employees in the lower pay quartile. The pay gap data is less negative than 2024, showing a narrowing in the pay difference between genders.

The pay grade analysis showed that more female employees are paid at grade G and above than males, which would lead to a negative Gender Pay Gap.

Mean Pay

Males	£17.55 per hour
Females	£17.93 per hour
Gender pay gap	-2.17%

Median Pay

Males	£16.33 per hour
Females	£16.64 per hour
Gender Pay Gap	-1.90%

Quartile	Percentage of Males	Percentage of Females
Upper	47.15	52.85
Upper Mid	54.84	45.16
Lower Mid	56.45	43.55
Lower	62.10	37.90
All Staff	55.15	44.85

13. Disability Pay Gap

This is the first year that the Council are reporting on the Disability Pay Gap, so we have no previous data to compare to. The mean pay gap is slightly positive and the median is slightly negative; this suggests that there is no significant difference in pay per hour between those with and without a disability. The quartile breakdown suggests that there may be a larger pay gap between these groups at the higher pay grades.

When analysing the number of employees paid at different grades it was found that those without a disability are slightly more likely to be paid at Grade G and above. The quartile breakdown reiterates, that there is an imbalance at higher pay grades, even though broadly speaking, there is very little difference in pay between those with and without a disability.

Mean pay	-0.51%
Median pay	+0.49%

Quartile	Mean Gap	Median Gap
Upper	-4.07	-1.90
Upper Mid	-2.41	-5.61
Lower Mid	-2.30	-2.09
Lower	-0.29	-1.46

14. Ethnicity Pay Gap

This is the first year that the Council is reporting on the Ethnicity Pay Gap, so there is no previous data to compare this to. On average, Asian employees are paid on average more than others, this is due to greater representation at upper quartiles of pay. There is still significant levels of unknown (NULL) data which could be affecting the outcomes, making it overall more difficult to be certain of any interpretation of this data. Those in the upper quartile are less likely to have reported their ethnicity.

	All employees		Lower quartile		Lower Middle Quartile		Upper Middle Quartile		Upper Quartile	
	Gap	%	Gap	%	Gap	%	Gap	%	Gap	%
White	N/A	89	N/A	92.7	N/A	90.3	N/A	87.9	N/A	86.2
Asian / Asian British	-1.8	4	1.2	2.4	1.2	5.6	0.7	4.0	2.6	4.9
Black or Black British	0.2	2	-3.0	1.6	-0.1	0.8	1.5	4.0	13.5	2.4
Mixed	-0.3	2	6.8	1.6	-0.5	1.6	1.7	3.2	-5.4	1.6
NULL	-20.0	2	8.0	0.8	5.1	1.6	1.3	0.8	-17.5	4.1
Other	4.1	0	-3.8	0.8	N/A	0.0	N/A	0.0	19.8	0.8

In the pay grade data in earlier sections, there was no significant difference between Ethnic groupings and their likelihood of being in a higher pay grade. This data confirms that there is not large differences between ethnic groups, except for the unknown and other group. The unknown group cannot be analysed effectively as it is a mixture of different ethnic groups. Other is a small group, therefore we cannot draw conclusions from this data, and there are not enough people in this group for the data to be significant.

15. Action Plan

This action plan outlines our commitments to making changes as a result of our findings. Outcomes will be analysed in the 2026 report.

- 1) Continue to drive increases in data disclosure through reminders and access to HR through an app to improve our data for better decision making
- 2) Share changes made as a result of this data
- 3) Analyse exit interviews for greater context on leaver data
- 4) Implement the use of a [Gender Decoder](#) in job adverts, making sure the language used in job adverts is either neutral or feminine coded, as the research says that this is the best approach for attracting male and female applicants.
- 5) Inclusive recruitment e-learning was made mandatory for all managers at the end of 2025. Impact will start to be seen in 2026 data report.
- 6) Skill-based assessment – look to better support managers in developing skill-based assessments to find the best person for the job. Evidence shows that skill-based assessment not only helps find people with the skills needed for the job but also increases the diversity of hires.



Onvero

**Talent Inclusion and
Diversity Evaluation TIDE
Report**

Rugby Borough Council

04th August 2026

Thank you for taking part in TIDE – Onvero’s self-assessment benchmarking tool to help you embed and sustain an inclusive workplace culture.

Wherever you are on your inclusion journey, we are here to support you to learn, grow, maintain, and advance your inclusion practices. This TIDE report provides you with baseline knowledge about your organisation. It highlights your achievements and helps direct you to where you can further build upon your commitments to creating an inclusive workplace.

Committing to completing TIDE is already cause for celebration, and taking part annually will support your organisation’s continuous improvement – helping you maintain your position and build on it.

We are pleased to support you on your inclusion journey.

The report shows your results across the following areas:

1. Diversity Data Monitoring
2. Strategy and Planning
3. DEI Training
4. Inclusive Leadership
5. Inclusive Recruitment
6. Talent Management and Development
7. Working Practices
8. Employee Voice and Engagement
9. Values and Behaviours
10. Wellbeing and Belonging

Within the results of each section, you will see:

- How you scored for questions where you did not achieve the maximum score available; and
- Your overall score with an indication of where your organisation currently sits on the TIDE Inclusion Roadmap.

Each summer, we benchmark the results of all participating organisations; once this is complete, we will give you an additional report (TIDEMark) with the benchmarking results.

Onvero's Inclusion Roadmap illustrates the different stages of the inclusion journey – from gaining a sense of awareness to embedding and sustaining an inclusive workplace culture. To find out more about the different stages of the inclusion journey, please refer to our [Quick Guide TIDE Inclusion Roadmap](#) .



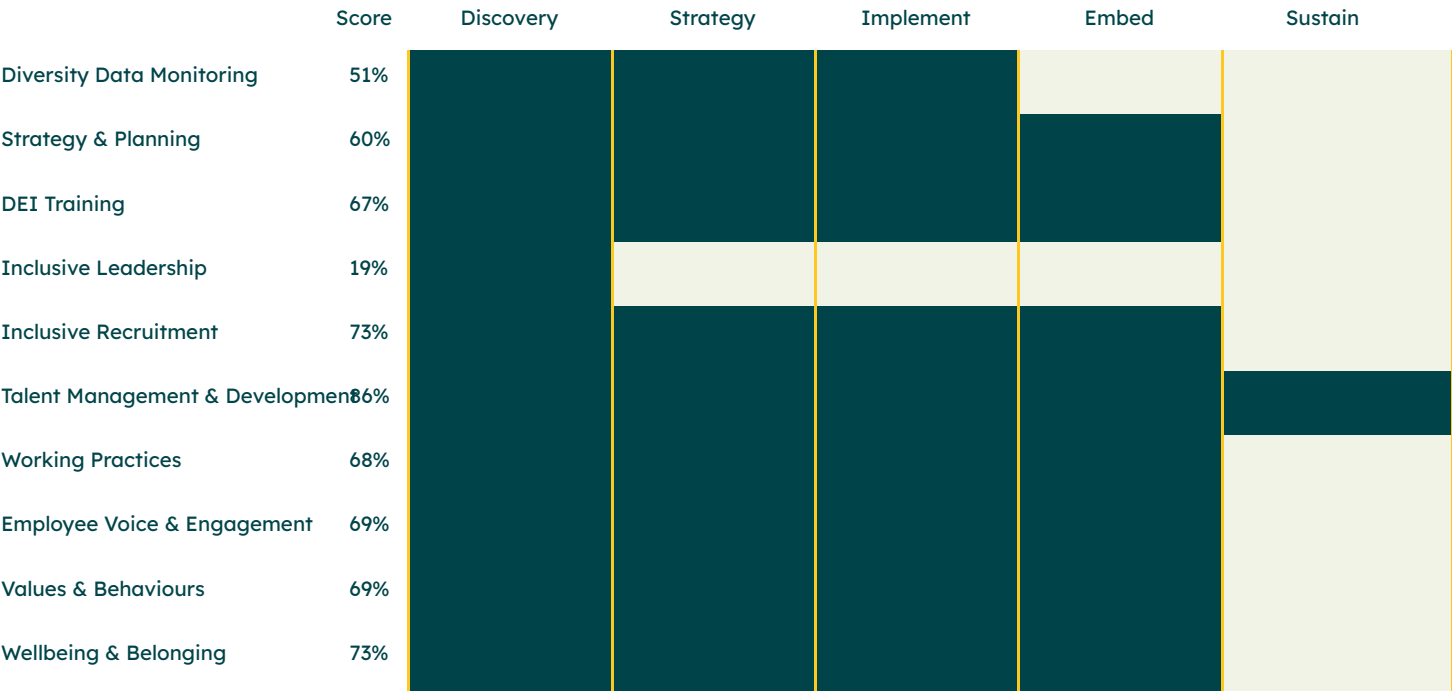
Your Overall Score

Your overall score is 62%

This means your organisation is currently working at **Embed** level.

Although this is the overall level for your organisation, there may be some specific areas of activity where you are working at a higher or lower stage on the roadmap. The remainder of this report will enable you to explore your results for each section in more detail and celebrate your successes, but also to know where to concentrate your efforts in the future.

The chart below shows your results for each of the 10 sections measured in TIDE.



Your Highest Scoring Sections

Your organisation achieved its highest scores in the following three sections:

- 1. Talent Management & Development - 86%
- 2. Inclusive Recruitment - 73%
- 3. Wellbeing & Belonging - 73%

Your Lowest Scoring Sections

Your organisation scored lowest in the following three sections, listed here with useful links to relevant Onvero resources to support the areas covered in these sections:

- 1. **Inclusive Leadership - 19%**
 - [Quick Guide: Inclusive Leadership](#)
 - [Research and Reports: Inclusive Leadership](#)
 - [Event Recording: Panel Event – Inclusive Leadership](#)
 - [Event Recording: British Beer and Pub Association – Creating a Culture of Inclusive Leadership](#)

- [Resource Hub: Allyship](#)
- [Employer Guide: Employee Resource Groups](#)
- [Employer Guide: Mentoring Programmes](#)
- [Quick Guide: Using Notable Dates to Promote Diversity and Inclusion](#)
- [Leading an Inclusive Workplace Culture Blog by Sandi Wassmer](#)
- [Quick Guide: Inclusive Psychological Safety](#)
- [Quick Guide: Inclusive Workplace Culture](#)

2. Diversity Data Monitoring - 51%

- [Diversity Data Monitoring Hub](#)

3. Strategy & Planning - 60%

- [Quick Guide: Diversity, Equality and Inclusion \(DEI\) Strategy](#)
- [Event Recording: DEI Strategy – Developing Strategic Direction](#)
- [Event Recording: DEI Strategy – Steps for Success](#)
- [Quick Guide: Diversity, Equality and Inclusion \(DEI\) Business Case](#)
- [Event Recording: Putting DEI First – Making the Business Case](#)
- [Quick Guide: Making the Business Case for DEI](#)

Areas for Improvement

The following pages list the questions for each section of TIDE where you did not achieve the maximum score available. The sections are presented in order of the lowest to the highest scoring sections. We recommend you explore and focus on the lowest scoring sections to inform your future DEI action planning. The score for each question is expressed as a percentage of the maximum score available.

Inclusive Leadership

- Q1. Has the organisation defined (in writing) its expectations of how leaders demonstrate inclusive leadership? - **0%**
- Q2. Which behaviours and qualities are leaders required to commit to and demonstrate? - **0%**
- Q3. How are the responsibilities and requirements of leaders communicated and promoted across the organisation? - **25%**
- Q4. Which of the following activities have leaders actively participated in over the last 12 months? - **21%**

- Q5. Over the past 12 months, in which of the following activities have leaders taken a lead role? - **26%**
- Q6. Based on the organisation's requirements of leaders, what information is considered when reviewing their performance (as least annually)? - **40%**

Diversity Data Monitoring

- Q1. Which of the following categories of diversity data do you gather from employees? - **50%**
- Q4. How did you determine what employee diversity data to gather and how to word the questions? - **0%**
- Q5. How do you explain the value, purpose and the organisation's approach to data monitoring to all employees? - **33%**
- Q6. Which of the following details/explanations are included in the organisation's communication about data monitoring? - **63%**
- Q10. What percentage of employees have provided a response to all of the diversity questions asked (including 'prefer not to say')? - **30%**
- Q13. At which stages of the employee lifecycle is diversity data reviewed, analysed and acted on (at least annually)? - **67%**
- Q15. Has diversity and representation in the organisation been maintained or improved in the last year? - **0%**
- Q16. Can you provide evidence of the positive impact of actions resulting from the analysis of employee diversity data in the last year? - **0%**
- Q17. Which of the following categories of diversity data do you, or external recruiters you work with, gather from applicants? - **38%**
- Q18. At which stages of the recruitment cycle is applicant diversity data reviewed, analysed and acted on (at least annually)? - **75%**
- Q20. Can you provide evidence of the positive impact of actions resulting from the analysis of applicant diversity data in the last year? - **0%**

Strategy & Planning

- Q1. Does the organisation have a DEI strategy? - **67%**
- Q3. Who was consulted to inform the creation of the DEI strategy? - **90%**
- Q4. Who owns and is accountable for the DEI strategy? - **50%**
- Q5. What is included in your DEI strategy? - **86%**
- Q8. Which of the following areas are included in either your DEI action plan, or objectives? - **86%**

- Q9. Who is assigned responsibility for implementing DEI action plans and objectives across the organisation? - **40%**
- Q10. Is progress in implementing the DEI strategy, action plan, or objectives discussed and reviewed (at least annually) at board meetings? - **0%**
- Q11. Is progress in implementing the DEI strategy, action plan, or objectives regularly discussed and reviewed (at least quarterly) at senior leadership meetings? - **0%**
- Q12. How does the organisation ensure employees understand and engage with the DEI strategy, action plan, or objectives? - **33%**
- Q15. What percentage of the organisation's DEI objectives, that it set out to achieve within the last 12 month reporting cycle, have been delivered? - **7%**

DEI Training

- Q2. Which of the following groups participate in introductory DEI training? - **75%**
- Q3. Which of the following is included in the organisation's introductory DEI training for all employees, including leaders and managers? - **89%**
- Q4. How often are employees provided with refresher training on DEI? - **0%**
- Q5. Which of the following groups does the organisation offer additional DEI training for, at least annually? - **29%**
- Q6. What additional DEI training has been made available to all employees in the last 24 months? - **64%**
- Q7. What additional DEI training has been made available to all managers and senior leaders in the last 24 months? - **90%**

Working Practices

- Q3. We have organisational policies and processes in place to retain and progress diverse talent, inclusive of all protected characteristics under the Equality Act 2010. - **0%**
- Q7. Does the organisation have policies and practices in place for employees and prospective employees that are inclusive of the following? - **38%**
- Q8. To create and maintain an inclusive working environment, do you encourage employees to use or share their personal pronouns, e.g. in email signatures or name badges? - **0%**

- Q2. What communication methods/channels does the organisation use to promote DEI messages to employees? - **58%**
- Q3. What methods does the organisation use to encourage two-way communication with employees regarding policies or processes that impact their working practices? - **33%**
- Q4. How does the organisation create a culture where employees feel psychologically safe to express their opinion/views at work? - **75%**
- Q5. How does the organisation support employee groups that focus on improving inclusivity, such as employee resource groups/networks or others? - **70%**
- Q6. Does the organisation carry out an employee engagement survey? - **20%**
- Q8. What percentage of employees have completed the employment engagement survey in the last year, or two years if you run your survey biannually? (If you have run multiple surveys in this time, please provide an average participation rate) - **71%**
- Q11. How are employee engagement survey scores analysed and acted upon? - **67%**
- Q12. Does the organisation analyse responses to the employee engagement surveys based on diversity data? - **0%**

Values & Behaviours

- Q2. Who was consulted to inform the creation of the organisational values? - **80%**
- Q3. How are the organisational values communicated and promoted to all employees? - **86%**
- Q5. How does the organisation support and encourage employees to uphold the organisational values (that support an inclusive and equitable workplace culture) and embed them into their daily work? - **45%**
- Q6. How does the organisation assess if the values are contributing positively to the organisational culture? - **67%**

Inclusive Recruitment

- Q2. How do you ensure job descriptions or role profiles and adverts are accurate, realistic, and attractive to as wide an audience as possible? - **68%**
- Q3. What steps are taken to ensure vacancies are relevant and attractive to the widest possible applicant pool? - **75%**

- Q4. What actions has the organisation taken within the last 12 months to widen access to those entering or re-entering employment? - **44%**
- Q5. How do you make the application process as inclusive as possible? - **44%**
- Q6. How do you ensure the selection process is fair and equitable? - **88%**

Wellbeing & Belonging

- Q2. What measures are in place to support employees' physical health and wellness? - **80%**
- Q3. What measures are in place to support employees' mental health and wellbeing? - **67%**
- Q6. How does the organisation create a psychologically safe work environment for all employees? - **69%**
- Q7. How does the organisation support all employees to feel a sense of connection and belonging? - **23%**

Talent Management & Development

- Q6. What steps does the organisation take to ensure all employees are able to engage with learning and development opportunities? - **86%**
- Q9. What steps has the organisation taken to ensure consistency and fairness in performance review/appraisal processes? - **75%**
- Q11. Which of the following are available to all employees, to support their career development? - **69%**
- Q14. Has the organisation made changes to policies and working practices following feedback received from exiting employees? - **0%**

Next Steps

We hope you find this report useful. We recommend that you use the results to:

- Celebrate your achievements in the highest performing areas and share this with internal stakeholders and senior leaders.
- Reflect on the areas in need of most improvement and look at the specific questions and scores to see what actions you need to take.
- Explore Onvero's rich resources to support you in the areas for improvement.
- Reach out to your Account Manager to arrange a call with one of our Diversity and Inclusion Leads to discuss your results and decide how you will take action to learn and improve or embed and sustain.

If you have any feedback or would like to talk to an Account Manager or the Diversity and Inclusion team about supporting you to make improvements, please contact us at: info@onvero.org.uk.

Appendix 3

Onvero (formerly Employers Network for Equality and Inclusion). Company registered in the UK No: 04549009. Registered Charity in England and Wales No: 1101366

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Rugby Borough Council – Annual Workforce Equality Report 2024

[1] [Local government workforce summary data - August 2024](#)

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1. Introduction

The Annual Workforce Equality Report is an important resource that will help shape how we approach workforce activity over the coming year. It will help us to understand trends across the protected characteristics, provide understanding of our workforce and help us to monitor the impact of policies.

This report provides an analysis of the Council's directly employed workforce over the 12-month period 1st January 2024 to 31st December 2024. The data used covers all permanent and fixed term employees. The data used in this report has been taken from the Council's Human Resources Information Systems and reflects the information you have declared. Where small numbers apply, data may not have been reported or detail reduced to ensure that no individual can be identified.

Where appropriate, the data is compared to Census 2021 figures for Rugby, this allows us to determine if the employees of the Council are representative of the residents of Rugby.

The information from this report will be used in a variety of ways across the Council including:

- Monitoring inequalities
- Information source for Equality Impact Assessments
- Identifying Learning & Development requirements
- Providing an evidence base for the Equality & Diversity and People Strategies
- Assisting workforce planning, recruitment and retention strategies

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2. Key Findings

A brief summary of the findings in this report shows some difference in experiences of employees based on their protected characteristics, most notably:

- High proportion of unknown data
- Females are more likely to be paid at pay grade G and above than males
- Those of Black ethnic origin are less likely to be paid at pay grade G and above
- Applicants of White ethnic origin are more likely to be appointed or promoted than those of other ethnic origins
- Those who declare a disability are less likely to apply for a promotion
- Female employees are more likely to leave employment with the Council than males
- Male employees are more likely to be subject to a disciplinary than females
- Those who raise a grievance are more likely to be white, male and over the age of 55

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3. Number of employees in post

a. By ethnic origin

Ethnic origin	Count	%
Any other Black background	1	0.21%
Any other ethnic group	2	0.41%
Any other Mixed background	1	0.21%
Any other White background	7	1.44%
Asian or Asian British - Indian	12	2.47%
Asian or Asian British - Pakistani	8	1.65%
Black or Black British - African	6	1.24%
Black or Black British - Caribbean	4	0.82%
Chinese	1	0.21%
Mixed - White and Asian	3	0.62%
Mixed - White and Black African	1	0.21%
Mixed - White and Black Caribbean	1	0.21%
White - British	404	83.30%
White - Irish	4	0.82%
White - Other	17	3.51%
(blank)	13	2.68%
Grand Total	485	

It can be difficult to draw conclusions from ethnic origin data as the numbers identifying in some groups are very small, a clearer picture can be given through examining ethnic groupings. This data can be compared with 2021 census data for Rugby, this allows us to determine if the employees of Rugby Borough Council are representative of the wider community.

Ethnic groupings	Count	%	Census Data
Asian or Asian British	20	4.12%	7.6%
Black or Black British	11	2.27%	2.7%
Mixed	6	1.24%	2.8%
Other Ethnic Groups	3	0.62%	1.1%
White	432	89.07%	85.7%
(blank)	13	2.68%	
Grand Total	485		

Compared to census data, the number of employees of Asian ethnic origin employed at the council is low. However, a significant number of employees have not responded to this question.

There has not been much change to the percentage of employees of White ethnic origin since the last Workforce report, however this report split ethnic groupings as white/other, so we cannot tell if there have been changes to representation of other ethnic groups.

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b. By Disability

Disability Status	Count	%	Census Data
Disabled	68	14.0%	16.2%
Not disabled	391	80.6%	83.8%
Not known	10	2.13%	
(blank)	16	3.30%	
Grand Total	485		

There is a high level of undeclared or unreported disability status (5.4%), making it difficult to draw conclusions from this data. It could be useful to include a definition of disability alongside this question, to support accurate reporting. There's been a slight decrease in the percentage of employees reporting a disability since 2021/22.

c. By Sex

Sex	Count	%	Census data
Female	204	42.06%	50.3%
Male	281	57.94%	49.7%
Grand Total	485		

There are significantly more males employed at the Council than females. This is a large change from the previous report in 2022, where the workforce was 51.06% male. This is in contrast to the Local Government workforce data for 2024, where on a national level Local Government employees are 74% female ^[1].

To get a deeper understanding of the data, a further breakdown of sex split by service area has been done.

Service Area	Male	Female	% Male	% Female
Chief Executive	16	18	47.06	52.94
Communities & Homes	32	55	36.78	63.22
Digital & Communications	20	16	55.56	44.44
Finance & Performance	9	17	34.62	65.38
Growth & Investment	12	17	41.38	58.62
Legal & Governance	2	18	10.00	90.00
Leisure & Wellbeing	19	28	40.43	59.57
Operations & Traded Services	155	15	91.18	8.82
Regulation & Safety	19	20	48.72	51.28

A further breakdown by service area shows that the imbalance comes from Operations & Traded Services, a large service area that is over 90% male. Operations & Traded Services includes property repairs, ground maintenance and

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work services, often regarded as male-dominated sectors. A focus on encouraging female applicants for roles in this service area could help to address the imbalance.

Additionally, Legal & Governance has a similar imbalance, but biases towards female employees, however as it is a small service area it has little impact on the overall sex balance of the Council.

d. By age

Age	Count	%
<25	31	6.39%
25-34	90	18.56%
35-44	108	22.27%
45-54	110	22.68%
55-64	125	25.77%
65-74	21	4.33%
Grand Total	485	

42.1% of RBC's workforce is over the age of 50, whereas in the UK 33% of the workforce are over 50 ^[3]. The median age of the workforce is 46 years.

e. By religion

Religion	Count	%	Census data
Christian	178	36.7%	50.5%
Hinduism	6	1.2%	3.3%
Jewish	1	0.2%	0.1%
Muslim	12	2.5%	1.8%
None	169	34.8%	36.1%
Other	17	3.5%	0.5%
Prefer not to say	28	5.8%	5.9%
Sikh	3	0.6%	1.4%
(blank)	71	14.6%	
Grand Total	485		

Large number of responses left blank or with 'Prefer not to say' (20.4%), compared to census of 5.9%. Limited conclusions can be drawn due to large number of nonrespondents; however, Christians are underrepresented in comparison to the population of Rugby. Due to the large number of nonrespondents, further breakdown of employees by religion will not be done as it cannot provide meaningful data.

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f. By sexual orientation

Sexual Orientation	Count	%	Census data
Bisexual	6	1.24%	1.06%
Declined to specify	27	5.57%	6.96%
Gay or Lesbian	9	1.86%	1.16%
Heterosexual or straight	384	79.18%	90.50%
Other	4	0.82%	0.28%
(blank)	55	11.34%	
Grand Total	485		

A large percentage of employees have not responded to this question. It is very difficult to draw any conclusions from this data due to the lack of responses. Due to the large number of nonrespondents, further breakdown of employees by sexual orientation will not be done as it cannot provide meaningful data.

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4. Number of employees in part time roles

Employment type	Total	%
full time	393	81.0
part time	92	19.0
Grand Total	485	

Rugby has a significant number of employees in part-time roles, it is useful to examine the characteristics of those in part-time roles to determine if there is an impact on employment opportunities for particular groups. In this context, part-time is any employee who works fewer than 37 hours a week.

a. By ethnic origin

Ethnic Group	Full time		Part time	
	Count	%	Count	%
Asian or Asian British	13	3.31%	7	7.61%
Black or Black British	10	2.54%	1	1.09%
Mixed	3	0.76%	3	3.26%
Other Ethnic Groups	2	0.51%	1	1.09%
White	352	89.57%	80	86.96%
(blank)	13	3.31%		
Grand Total	393		92	

Those with Asian or mixed ethnicities are more likely to be a part time employee than those of other ethnic origins. 13 full-time employees did not disclose their ethnicity.

b. By disability

Disability status	Full time		Part time	
	Count	%	Count	%
Disabled	51	12.98%	17	18.48%
Not disabled	318	80.92%	73	79.35%
Not known	9	2.29%	1	1.08%
(blank)	15	3.82%	1	1.08%
Grand Total	393		92	

Those with a disability are more likely to be employed in a part time role than those without a disability.

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c. By sex

	Full time		Part time	
Sex	Count	%	Count	%
Female	140	35.62%	64	69.57%
Male	253	64.38%	28	30.43%
Grand Total	393		92	

Females are far more likely to be in part time employment than males. This is similar to a nationwide trend where females are more likely to work part-time, often due to childcare. About 70% of those in part-time employment in the UK are female. ^[2]

d. By age

	Full time		Part time		Total	
Age	Count	%	Count	%	Count	%
<25	24	6.11%	7	7.61%	31	6.39%
25-34	76	19.34%	14	15.22%	90	18.56%
35-44	88	22.39%	20	21.74%	108	22.27%
45-54	92	23.41%	18	19.57%	110	22.68%
55-64	100	25.45%	25	27.17%	125	25.77%
65-74	13	3.31%	8	8.70%	21	4.33%
Grand Total	393		92		485	

Those over the age of 65 are more likely to be in part-time employment. Apart from this age group, there is no real pattern between age and part-time employment.

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5. Number of employees in pay grade

Pay grade	Count
F and below	410
G and above	77
Total	487

The split in pay grades was chosen as management level positions are paid at grade G and above, this pay grade indicates higher pay, experience and qualifications. The count differs from the total number of employees as a few members of staff hold more than one permanent role, but at different pay grades.

a. By ethnicity

	F and below		G and above		Total	
Row Labels	Count	%	Count	%	Count	%
Asian or Asian British	18	4.39%	3	3.90%	21	4.31%
Black or Black British	11	2.68%	1	1.37%	12	2.46%
Mixed	4	0.98%	2	2.60%	6	1.23%
Other Ethnic Groups	2	0.49%	0	0.00%	2	0.41%
White	366	89.27%	67	87.01%	433	88.91%
(blank)	9	2.20%	4	5.19%	13	2.67%
Grand Total	410		77		487	

Those of Black ethnic origin are less likely to be paid at pay grade G or above than those of other ethnic origins.

b. By disability

	F and below		G and above		Total	
Disability status	Count	%	Count	%	Count	%
Disabled	59	14.86%	10	13.51%	69	14.65%
Not disabled	328	82.62%	64	86.49%	392	83.23%
Not known	10	2.52%	0	0.00%	10	2.12%
(blank)	13	3.17%	3	3.90%	16	3.29%
Grand Total	410		77		487	

A high number of no response makes interpreting data difficult. There is no significant difference between disabled and non-disabled employees in this data set.

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c. By sex

	F and below		G and above		Total	
Sex	Count	%	Count	%	Count	%
Female	160	39.02%	45	58.44%	205	42.09%
Male	250	60.98%	32	41.56%	282	57.91%
Grand Total	410		77		487	

Females are more likely to be paid at G grade and above than males. Indicating a greater number of female employees at management level.

d. By age

	F and below		G and above		Total	
Age	Count	%	Count	%	Count	%
<25	32	7.80%	0	0.00%	32	6.57%
25-34	80	19.51%	9	11.69%	89	18.28%
35-44	89	21.71%	19	24.68%	108	22.18%
45-54	80	19.51%	33	42.86%	113	23.20%
55-64	111	27.07%	13	16.88%	124	25.46%
65-74	18	4.39%	3	3.90%	21	4.31%
Grand Total	410		77		487	

Those most likely to be in pay grade G and above are between the ages of 35 and 54. As a pay grade above G is indicative of a greater level of experience, it is in line with expectations those paid at grade G and above are less likely to be under 30.

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6. Number of applicants/shortlisted/appointed

Stage of Application	Count	%
Appointed	43	8.11%
Candidate withdrawn	35	6.60%
Rejected following interview	61	11.51%
Rejected after application	391	73.77%
Grand Total	530	

In 2024, RBC received 530 applications for job roles, of which 43 were appointed.

This section will look at the success rates of those of different protected characteristics to examine if there are any differences. The Council is a Disability Confident Employer, and uses the Guaranteed Interview Scheme for those applicants who declare a disability and meet the minimum essential requirements for the job role. Additionally, the Council holds a Defence Employer Recognition Scheme (DERS) Bronze award, we do not currently collect data on veteran status of applicants, but this is something the Council aims to do in the future. Applicants' information is anonymised, where appropriate, to lessen the risk of bias entering the process.

a. By ethnic origin

Ethnic Group	Applicants	%	Shortlisted	%	Appointed	%	% of applicants appointed
Asian or Asian British	104	19.62%	13	12.50%	3	6.98%	2.88%
Black or Black British	35	6.60%	9	8.65%	2	4.65%	5.71%
Mixed	17	3.21%	5	4.81%	1	2.33%	5.88%
Other Ethnic Groups	28	5.28%	7	6.73%	1	2.33%	3.57%
White	332	62.64%	68	65.38%	36	83.72%	10.84%
blank	14	2.64%	2	1.92%	0	0.00%	0.00%
Grand Total	530		104		43		

There are clear patterns in the data, in that there is a high number of applicants of Asian ethnic origin who are applying for roles, but very few are successful in being shortlisted or appointed to roles. The data also shows that white applicants are far more likely to be appointed after interview than those of other ethnic groups. The appointment of candidates of white ethnic origin has increased from 75.31% in 2022. This is a trend that needs to be examined closely, with strategies put in place to address this disparity. From the data, the biggest change in success rate appears to be at the interview stage, so any interventions should focus on this stage.

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b. By disability

Disability status	Applicants	%	Shortlisted	%	Appointed	%	% of applicants appointed
Disabled	44	8.30%	9	8.65%	3	6.98%	6.82%
Not disabled	452	85.28%	88	84.62%	38	88.37%	8.41%
Not known	16	3.02%	5	4.81%	2	4.65%	12.50%
blank	18	3.40%	2	1.92%	0	0.00%	0.00%
Grand Total	530		104		43		

There are no significant trends in appointments between applicants who do and do not have a disability. The number of applicants declaring a disability has increased by 2% since 2022, though this hasn't made a significant difference to the number of appointments. There is still a significant number of candidates not declaring a disability status, which makes it more difficult to be certain of the conclusion of a similar success rate.

c. By sex

Sex	Applicants	%	Shortlisted	%	Appointed	%	% of applicants appointed
Female	285	53.77%	59	56.73%	23	53.49%	8.07%
Male	238	44.91%	45	43.27%	20	46.51%	8.40%
Unspecified	7	1.32%	0	0.00%	0	0.00%	0.00%
Grand Total	530		104		43		

There is very little difference between the success rates of male and female candidates, however there are more female applicants than male. These figures are similar to those from 2022; however, RBC still has a majority male workforce. This may be due to greater retention of male staff.

d. By age

Age	Applicants	%	Shortlisted	%	Appointed	%	% of applicants appointed
<25	89	16.79%	16	15.38%	11	25.58%	12.36%
25-34	164	30.94%	33	31.73%	9	20.93%	5.49%
35-44	116	21.89%	18	17.31%	8	18.60%	6.90%
45-54	99	18.68%	18	17.31%	8	18.60%	8.08%
55-64	59	11.13%	19	18.27%	7	16.28%	11.86%
65-74	3	0.57%	0	0.00%	0	0.00%	0.00%
Grand Total	530		104		43		

46.51% of those appointed to job roles in the Council were under the age of 35. However, applicants between the ages of 25 and 44 were the least likely to be

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appointed, although the highest success rate is for those below 25. There is no clear pattern to the recruitment data with respect to age.

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7. Number of employees promoted

During 2024, 44 employees were offered promotions within RBC. This section will look at the outcomes for applicants for promotion of different backgrounds to see if there is any difference.

a. By ethnic origin

Ethnic Origin	Applied	%	Interviewed	%	Offer	%
Other	3	0.65%	1	0.85%	0	0%
White	295	64.27%	90	76.27%	40	90.91%
Asian or Asian British	100	21.79%	18	15.25%	2	4.55%
Mixed	13	2.83%	2	1.69%	0	0%
Black or Black British	46	10.02%	7	5.93%	2	4.55%
blank	2	0.44%	0	0%	0	0%
Grand Total	459		118		44	

Though those of White ethnic origin are 64.27% of the applicants, but 90.91% of the offers received. Showing that those of White ethnic origin were far more likely to receive a promotion than those of other ethnic origins.

b. By disability

Disability Status	Applied	%	Interviewed	%	Offer	%
Disabled	29	6.32%	8	6.78%	0	0%
Not disabled/ Unknown	430	93.68%	110	93.22%	44	100.00%
Grand Total	459		118		44	

14% of RBC employees have declared a disability, however only 6.32% of applicants for promotion in 2024 stated that they had a disability. This data demonstrates that employees with a disability are less likely to apply for, and receive a promotion.

c. By sex

Sex	Count	%	Interviewed	%	Offer	%
Female	266	57.95%	66	55.93%	24	54.55%
Male	191	41.61%	52	44.07%	20	45.45%
Unspecified	2	0.44%	0	0%	0	0%
Grand Total	459		118		44	

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Females are more likely to apply for promotions than males, however outcomes for applicants are similar.

d. By age

Age	Applicant	%	Interviewed	%	Offer	%
<25	54	11.76%	14	11.86%	8	18.18%
25-34	142	30.94%	42	35.59%	16	36.36%
35-44	125	27.23%	24	20.34%	12	27.27%
45-54	91	19.83%	23	19.29%	6	13.64%
55-64	47	10.24%	15	12.71%	2	4.55%
Grand Total	459		118		44	

Those over the age of 45 were less likely to be successful in being offered a promotion in comparison to those under the age of 45.

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8. Number of employees leaving

During 2024, a total of 89 employees left employment with RBC. Comparing the demographics of those leaving versus the demographics of the Council as a whole allows us to see if there are any patterns in who is more likely to leave, giving us the opportunity to examine the reasons, if any, behind these patterns. The number of employees leaving in the 2021/22 reporting period was 86, so there has been no significant change in this metric.

a. By ethnic origin

Ethnic Group	Count	% of leavers	% of employees
(blank)	2	2.25%	2.68%
Asian or Asian British	6	6.74%	4.12%
Black or Black British	5	5.62%	2.27%
Other ethnic group	1	1.12%	0.62%
White	75	84.27%	89.07%
Grand Total	89		

The data demonstrates that those of Asian and Black ethnic groups are more likely to leave RBC than those of other backgrounds. Examining the exit interviews for the reasons given for leaving may help to determine if there is anything contributing to this lower retention rate.

b. By disability

Disability Status	Count	% of leavers	% of employees
(blank)	1	1.12%	3.30%
Disabled	11	12.36%	14.00%
Not disabled	74	83.15%	80.60%
Not known	3	3.37%	2.13%
Grand Total	89		

From this data, we can conclude that those with disabilities are no more likely to leave than those without.

c. By sex

Sex	Count	% of leavers	% of employees
Female	45	50.56%	42.06%
Male	44	49.44%	57.94%
Grand Total	89		

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In comparison to how many females are employed at RBC; they are more likely to leave employment with the Council than males are. Examining the exit interviews for the reasons given for leaving of these employees may help to determine if there is anything contributing to this lower retention rate.

d. By age

Age	Count	% of leavers	% of employees
<25	7	7.87%	6.39%
25-34	17	19.10%	18.56%
35-44	18	20.22%	22.27%
45-54	15	16.85%	22.68%
55-64	26	29.21%	25.77%
65-75	6	6.74%	4.33%
Grand Total	89		

There is no pattern between age and leaving employment with the Council, the increase after 65 would be expected due to retirement.

[1] [Local government workforce summary data - August 2024](#)

[2] [Women and the UK economy - House of Commons Library \(parliament.uk\)](#)

[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)

9. Number of employees receiving training

RBC provides a range of training opportunities to support the professional development of employees. Engaging in training can indicate who is being supported to progress in the workplace. Therefore, an important aspect of workforce equality is to ensure that all employees have opportunities to develop. The data set being analysed is for 2024, but was collected at the start of November, meaning that Q4 data is incomplete. General trends can still be identified from this data. The L&D focus for 2024 was on upskilling people managers, therefore we expect to see a bias in the data towards managers receiving training for this year.

Below is the data showing all training completed in 2024 (excluding November and December as they were not available at the time of collection). The four most attended training sessions are all induction courses that must be completed by all new starters. Due to the mandatory nature of these courses. They may be excluded from some data sets to give a clear picture of additional training opportunities.

Name of training	Attendee Count
Corporate Induction	83
Health & Safety Induction	82
Equality & Diversity - Diversity & Inclusion (Induction) - Nelson Trng	77
Safeguarding Children & Adults - Induction Training	75
SLA Training	66
Legislation Update for People Managers	65
Absence Policy Training for Managers	56
Difficult Conversations for Managers	44
Safer Recruitment Training	44
Mental Health & Wellbeing for Managers	42
PDR Online Briefing	35
Managing Effectively - Performance Management	34
ICT@RBC/SharePoint	31
Employment Law Updates for People Managers	30
Managing Effectively - Effective Communication	28
Dignity at Work Policy Training for Managers	28
Coaching Training for Managers	26
Managing Effectively - Coaching Training	20
Managing Effectively - Being a People manager	19
Performance Development Review Workshop	18
First Aid at Work Training	17
Managing Effectively - Change Management	15
Managing Effectively - Objective Setting (SMARTER)	15
First Aid at Work Requalification Training	15
Fire Warden Training	12
Managing Effectively - Situational Leadership	12

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[2] [Women and the UK economy - House of Commons Library \(parliament.uk\)](#)

[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)

Managing Effectively - Planning & Prioritising	12
Complaint Handling Code	11
Conflict Management Training	10
IT - Excel Introduction	10
IT - Excel Intermediate	8
Managing Effectively - Resilience	7
Managing Effectively - Brilliant Basics	6
Project Management Training	5
Disciplinary Policy Training for Managers	5
J2: Rough Terrain Telescopic Up To 9M	5
Managing Effectively - Influencing & Persuading	4
IT - PowerHour - Pivots	4
Verbal De-escalation & Conflict Management Training	4
Managing Effectively - BELBIN	4
IT - Formatting Long Documents	3
IT - PowerHour - MS Planner and To Do in Teams	2
IT - PowerPoint	1
Grand Total	1090

a. By ethnic origin

Ethnic Group	Count	% of training	% of employees
Asian or Asian British	22	2.02%	4.12%
Black or Black British	13	1.19%	2.27%
Mixed	12	1.10%	1.24%
Other Ethnic Groups	5	0.46%	0.62%
White	997	91.47%	89.07%
(blank)	41	3.76%	2.67%
Grand Total	1090		

When looking at all training episodes, those of white ethnic origin receive more training than those of Asian or Black ethnic origin. This is examined in further detail below by removing induction courses from the data to see if this has any impact.

Ethnic Group	Count	% of training	% of employees
Asian or Asian British	10	1.29%	4.12%
Black or Black British	6	0.78%	2.27%
Mixed	6	0.78%	1.24%
Other Ethnic Groups	1	0.13%	0.62%
White	733	94.83%	89.07%
(blank)	17	2.20%	2.67%
Grand Total	773		

From the data showing training not related to induction, those of white ethnic origin are receiving more training than other ethnic groups. Long term this could affect progression of employees.

[1] [Local government workforce summary data - August 2024](#)

[2] [Women and the UK economy - House of Commons Library \(parliament.uk\)](#)

[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)

b. By disability

Disability status	Count with induction	% of training	% of employees
No	904	82.94%	80.6%
Not Known	26	2.39%	2.13%
Yes	120	11.01%	14.0%
(blank)	40	3.67%	3.30%
Grand Total	1090		

Disability status	Count without induction	% of training	% of employees
No	643	83.18%	80.6%
Not Known	15	1.94%	2.13%
Yes	99	12.81%	14.0%
(blank)	16	2.06%	3.30%
Grand Total	773		

The data shows that no significant difference in training participation from those who have declared and not declared a disability.

c. By sex

Sex	Count with induction	% of training	% of employees
Female	582	53.39%	42.09%
Male	508	46.61%	57.91%
Grand Total	1090		

Sex	Count without induction	% of training	% of employees
Female	448	57.96%	42.09%
Male	325	42.04%	57.91%
Grand Total	773		

Although males make up a larger percentage of the workforce, females are more likely to have participated in training. This gap widens further when removing mandatory induction training courses, showing that females are participating in additional training more frequently.

[1] [Local government workforce summary data - August 2024](#)

[2] [Women and the UK economy - House of Commons Library \(parliament.uk\)](#)

[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)

Course Title	Female	Male	Difference
Absence Policy Training for Managers	35	21	-14
Coaching Training for Managers	18	8	-10
Complaint Handling Code	7	4	-3
Conflict Management Training	5	5	0
Corporate Induction	37	46	9
Difficult Conversations for Managers	24	20	-4
Dignity at Work Policy Training for Managers	17	11	-6
Disciplinary Policy Training for Managers	3	2	-1
Employment Law Updates for People Managers	18	12	-6
Equality & Diversity - Diversity & Inclusion (Induction) - Nelson Trng	30	47	17
Fire Warden Training	9	3	-6
First Aid at Work Requalification Training	7	8	1
First Aid at Work Training	10	7	-3
Health & Safety Induction	38	44	6
ICT@RBC/SharePoint	12	19	7
IT - Excel Intermediate	3	5	2
IT - Excel Introduction	3	7	4
IT - Formatting Long Documents	1	2	1
IT - PowerHour - MS Planner and To Do in Teams	0	2	2
IT - PowerHour - Pivots	2	2	0
IT - PowerPoint	0	1	1
J2: Rough Terrain Telescopic Up To 9M	0	5	5
Legislation Update for People Managers	40	25	-15
Managing Effectively - Being a People manager	11	8	-3
Managing Effectively - BELBIN	3	1	-2
Managing Effectively - Brilliant Basics	5	1	-4
Managing Effectively - Change Management	7	8	1
Managing Effectively - Coaching Training	12	8	-4
Managing Effectively - Effective Communication	18	10	-8
Managing Effectively - Influencing & Persuading	3	1	-2
Managing Effectively - Objective Setting (SMARTER)	11	4	-7
Managing Effectively - Performance Management	22	12	-10
Managing Effectively - Planning & Prioritising	9	3	-6
Managing Effectively - Resilience	5	2	-3
Managing Effectively - Situational Leadership	8	4	-4
Mental Health & Wellbeing for Managers	25	17	-8
PDR Online Briefing	20	15	-5
Performance Development Review Workshop	11	7	-4
Project Management Training	2	3	1
Safeguarding Children & Adults - Induction Training	29	46	17
Safer Recruitment Training	34	10	-24
SLA Training	25	41	16
Verbal De-escalation & Conflict Management Training	3	1	-2
Grand Total	582	508	-74

Female employees were more likely to have attended training for management roles than males. Reflecting the fact that more female employees are paid at pay grade G and above than males. This reflects that many of the training courses provided are aimed at those in management positions. Male employees were more likely to have taken part in IT training.

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[2] [Women and the UK economy - House of Commons Library \(parliament.uk\)](#)

[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)

d. By age

Age	Count with induction	%	% of employees
<25	67	6.15%	6.39%
25-34	208	19.08%	18.56%
35-44	269	24.68%	22.27%
45-54	297	27.25%	22.68%
55-64	221	20.28%	25.77%
65-74	28	2.57%	4.33%
Grand Total	1090		

Age	Count without induction	%	% of employees
<25	20	2.59%	6.39%
25-34	118	15.27%	18.56%
35-44	196	25.36%	22.27%
45-54	251	32.47%	22.68%
55-64	165	21.35%	25.77%
65-74	23	2.98%	4.33%
Grand Total	773		

Those most likely to have completed training, not including induction, are between ages 35 and 54, most likely reflecting management level roles. When taking induction into account, there is a significant increase in the percentage of training being undertaken by those aged 35 and under, suggesting that many new starters during 2024 are in this age group.

[1] [Local government workforce summary data - August 2024](#)

[2] [Women and the UK economy - House of Commons Library \(parliament.uk\)](#)

[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)

10. Employees subject to disciplinary procedure

During 2024, 15 employees were subject to disciplinary procedures. This is in line with the 2021/22 report, where 15 disciplinaries were reported. Without context and with a small data set it is difficult to draw conclusions. However, all disciplinaries were of male employees during 2024.

a. By ethnic origin

Ethnic origin	Count	%
Black or Black British	1	6.67%
blank	2	13.33%
White	12	80.00%
Grand Total	15	

b. By disability

Disability Status	Count	%
Disabled	3	20.00%
Not disabled	10	66.67%
Not known	1	6.67%
blank	1	6.67%
Grand Total	15	

c. By sex

Sex	Count	%
Male	15	100.00%
Grand Total	15	

d. By age

Age	Count	%
25-34	3	20.00%
35-44	4	26.67%
45-54	1	6.67%
55-64	6	40.00%
65-74	1	6.67%
Grand Total	15	

[1] [Local government workforce summary data - August 2024](#)

[2] [Women and the UK economy - House of Commons Library \(parliament.uk\)](#)

[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)

11. Employees who have raised a grievance

During 2024, 16 employees raised a grievance. In 2021/22 there were 5 grievances. There is a small data set and no context as to what the grievances are related to, so few conclusions can be drawn. However, those who raise a grievance were overwhelmingly white, male and over the age of 55.

a. By ethnic origin

Ethnic Origin	Count	%
White	16	100.00%
Grand Total	16	

b. By disability

Disability Status	Count	%
Disabled	3	18.75%
Not disabled	13	81.25%
Grand Total	16	

c. By sex

Sex	Count	%
Female	5	31.25%
Male	11	68.75%
Grand Total	16	

d. By age

Age	Count	%
<25	1	6.25%
25-34	2	12.50%
35-44	3	18.75%
45-54	2	12.50%
55-64	7	43.75%
65-74	1	6.25%
Grand Total	16	

[1] [Local government workforce summary data - August 2024](#)

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[3] [The State of Ageing in 2020 | Centre for Ageing Better](#)



Onvero

**Talent Inclusion and
Diversity Evaluation TIDE
Report**

Rugby Borough Council

27th August 2025

Thank you for taking part in TIDE – Onvero’s self-assessment benchmarking tool to help you embed and sustain an inclusive workplace culture.

Wherever you are on your inclusion journey, we are here to support you to learn, grow, maintain, and advance your inclusion practices. This TIDE report provides you with baseline knowledge about your organisation. It highlights your achievements and helps direct you to where you can further build upon your commitments to creating an inclusive workplace.

Committing to completing TIDE is already cause for celebration, and taking part annually will support your organisation’s continuous improvement – helping you maintain your position and build on it.

We are pleased to support you on your inclusion journey.

The report shows your results across the following areas:

1. Diversity Data Monitoring
2. Strategy and Planning
3. DEI Training
4. Inclusive Leadership
5. Inclusive Recruitment
6. Talent Management and Development
7. Working Practices
8. Employee Voice and Engagement
9. Values and Behaviours
10. Wellbeing and Belonging

Within the results of each section, you will see:

- How you scored for questions where you did not achieve the maximum score available; and
- Your overall score with an indication of where your organisation currently sits on the TIDE Inclusion Roadmap.

Each summer, we benchmark the results of all participating organisations; once this is complete, we will give you an additional report (TIDEMark) with the benchmarking results.

Onvero's Inclusion Roadmap illustrates the different stages of the inclusion journey – from gaining a sense of awareness to embedding and sustaining an inclusive workplace culture. To find out more about the different stages of the inclusion journey, please refer to our [Quick Guide TIDE Inclusion Roadmap](#) .



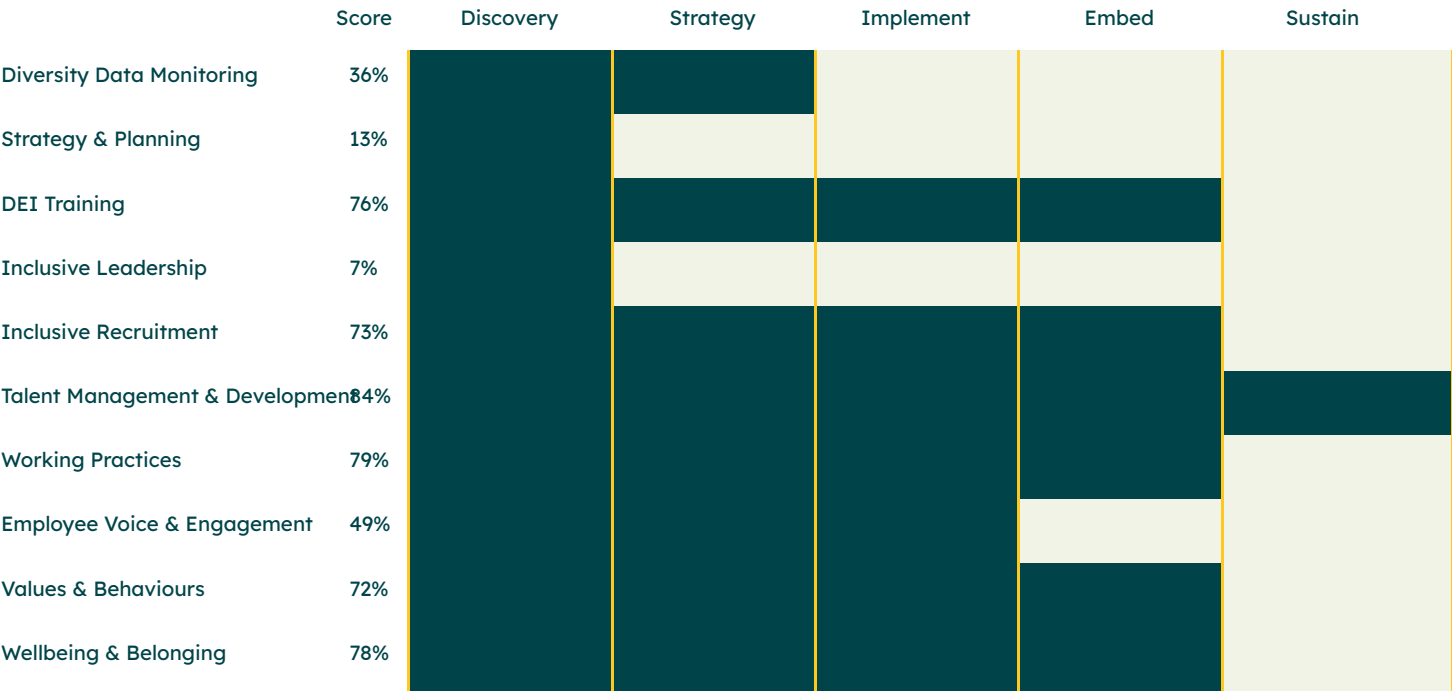
Your Overall Score

Your overall score is 53%

This means your organisation is currently working at **Implement** level.

Although this is the overall level for your organisation, there may be some specific areas of activity where you are working at a higher or lower stage on the roadmap. The remainder of this report will enable you to explore your results for each section in more detail and celebrate your successes, but also to know where to concentrate your efforts in the future.

The chart below shows your results for each of the 10 sections measured in TIDE.



Your Highest Scoring Sections

Your organisation achieved its highest scores in the following three sections:

- 1. Talent Management & Development - 84%
- 2. Working Practices - 79%
- 3. Wellbeing & Belonging - 78%

Your Lowest Scoring Sections

Your organisation scored lowest in the following three sections, listed here with useful links to relevant Onvero resources to support the areas covered in these sections:

- 1. **Inclusive Leadership - 7%**
 - [Quick Guide: Inclusive Leadership](#)
 - [Research and Reports: Inclusive Leadership](#)
 - [Event Recording: Panel Event – Inclusive Leadership](#)
 - [Event Recording: British Beer and Pub Association – Creating a Culture of Inclusive Leadership](#)

- [Resource Hub: Allyship](#)
- [Employer Guide: Employee Resource Groups](#)
- [Employer Guide: Mentoring Programmes](#)
- [Quick Guide: Using Notable Dates to Promote Diversity and Inclusion](#)
- [Leading an Inclusive Workplace Culture Blog by Sandi Wassmer](#)
- [Quick Guide: Inclusive Psychological Safety](#)
- [Quick Guide: Inclusive Workplace Culture](#)

2. Strategy & Planning - 13%

- [Quick Guide: Diversity, Equality and Inclusion \(DEI\) Strategy](#)
- [Event Recording: DEI Strategy – Developing Strategic Direction](#)
- [Event Recording: DEI Strategy – Steps for Success](#)
- [Quick Guide: Diversity, Equality and Inclusion \(DEI\) Business Case](#)
- [Event Recording: Putting DEI First – Making the Business Case](#)
- [Quick Guide: Making the Business Case for DEI](#)

3. Diversity Data Monitoring - 36%

- [Diversity Data Monitoring Hub](#)

Areas for Improvement

The following pages list the questions for each section of TIDE where you did not achieve the maximum score available. The sections are presented in order of the lowest to the highest scoring sections. We recommend you explore and focus on the lowest scoring sections to inform your future DEI action planning. The score for each question is expressed as a percentage of the maximum score available.

Inclusive Leadership

- Q1. Has the organisation defined (in writing) its expectations of how leaders demonstrate inclusive leadership? - **0%**
- Q2. Which behaviours and qualities are leaders required to commit to and demonstrate? - **0%**
- Q3. How are the responsibilities and requirements of leaders communicated and promoted across the organisation? - **25%**
- Q4. Which of the following activities have leaders actively participated in over the last 12 months? - **0%**

- Q5. Over the past 12 months, in which of the following activities have leaders taken a lead role? - **0%**
- Q6. Based on the organisation's requirements of leaders, what information is considered when reviewing their performance (as least annually)? - **20%**

Strategy & Planning

- Q1. Does the organisation have a DEI strategy? - **33%**
- Q2. Is the organisation's DEI strategy published? - **50%**
- Q3. Who was consulted to inform the creation of the DEI strategy? - **40%**
- Q4. Who owns and is accountable for the DEI strategy? - **50%**
- Q5. What is included in your DEI strategy? - **36%**
- Q6. Does the organisation regularly (at least annually) review the training and development needs of those responsible for delivering the DEI strategy and offer the required support? - **0%**
- Q7. Does your organisation have an implementation plan or set of objectives that details how the strategy is put into action? - **0%**
- Q8. Which of the following areas are included in either your DEI action plan, or objectives? - **0%**
- Q9. Who is assigned responsibility for implementing DEI action plans and objectives across the organisation? - **0%**
- Q10. Is progress in implementing the DEI strategy, action plan, or objectives discussed and reviewed (at least annually) at board meetings? - **0%**
- Q11. Is progress in implementing the DEI strategy, action plan, or objectives regularly discussed and reviewed (at least quarterly) at senior leadership meetings? - **0%**
- Q12. How does the organisation ensure employees understand and engage with the DEI strategy, action plan, or objectives? - **0%**
- Q13. Does the organisation have a formal process to review, monitor, and measure the impact of the DEI objectives? - **0%**
- Q14. Does the organisation regularly communicate or report on progress in delivering the organisation's DEI strategy, action plan, and/or objectives? - **0%**
- Q15. What percentage of the organisation's DEI objectives, that it set out to achieve within the last 12 month reporting cycle, have been delivered? - **0%**

Diversity Data Monitoring

- Q1. Which of the following categories of diversity data do you gather from employees? - **41%**

- Q3. How frequently do you ask employees to update their diversity profile? - **33%**
- Q4. How did you determine what employee diversity data to gather and how to word the questions? - **25%**
- Q5. How do you explain the value, purpose and the organisation's approach to data monitoring to all employees? - **17%**
- Q6. Which of the following details/explanations are included in the organisation's communication about data monitoring? - **50%**
- Q10. What percentage of employees have provided a response to all of the diversity questions asked (including 'prefer not to say')? - **50%**
- Q12. How does the organisation process the outputs of employee data monitoring exercises? - **36%**
- Q13. At which stages of the employee lifecycle is diversity data reviewed, analysed and acted on (at least annually)? - **0%**
- Q14. Has the organisation set and documented specific targets for improving diversity and addressing under-representation? - **0%**
- Q16. Can you provide evidence of the positive impact of actions resulting from the analysis of employee diversity data in the last year? - **0%**
- Q17. Which of the following categories of diversity data do you, or external recruiters you work with, gather from applicants? - **41%**
- Q18. At which stages of the recruitment cycle is applicant diversity data reviewed, analysed and acted on (at least annually)? - **0%**
- Q19. In the last year, has the organisation seen an increase in the diversity of applicants? - **0%**
- Q20. Can you provide evidence of the positive impact of actions resulting from the analysis of applicant diversity data in the last year? - **0%**

Employee Voice & Engagement

- Q2. What communication methods/channels does the organisation use to promote DEI messages to employees? - **42%**
- Q3. What methods does the organisation use to encourage two-way communication with employees regarding policies or processes that impact their working practices? - **22%**
- Q4. How does the organisation create a culture where employees feel psychologically safe to express their opinion/views at work? - **56%**
- Q5. How does the organisation support employee groups that focus on improving inclusivity, such as employee resource groups/networks or others? - **70%**
- Q6. Does the organisation carry out an employee engagement survey? - **20%**

- Q7. Which of the following areas does the employee engagement survey include questions on? - **83%**
- Q8. What percentage of employees have completed the employment engagement survey in the last year, or two years if you run your survey biannually? (If you have run multiple surveys in this time, please provide an average participation rate) - **43%**
- Q9. In the last year, or two years if you run your survey biannually, have participation levels been maintained or improved? - **0%**
- Q10. In the last year, or two years if you run your survey biannually, has the overall engagement survey score for employees been maintained or improved? - **0%**
- Q11. How are employee engagement survey scores analysed and acted upon? - **42%**
- Q12. Does the organisation analyse responses to the employee engagement surveys based on diversity data? - **0%**

Values & Behaviours

- Q2. Who was consulted to inform the creation of the organisational values? - **80%**
- Q3. How are the organisational values communicated and promoted to all employees? - **86%**
- Q5. How does the organisation support and encourage employees to uphold the organisational values (that support an inclusive and equitable workplace culture) and embed them into their daily work? - **73%**
- Q6. How does the organisation assess if the values are contributing positively to the organisational culture? - **67%**

Inclusive Recruitment

- Q2. How do you ensure job descriptions or role profiles and adverts are accurate, realistic, and attractive to as wide an audience as possible? - **68%**
- Q3. What steps are taken to ensure vacancies are relevant and attractive to the widest possible applicant pool? - **75%**
- Q4. What actions has the organisation taken within the last 12 months to widen access to those entering or re-entering employment? - **44%**
- Q5. How do you make the application process as inclusive as possible? - **44%**
- Q6. How do you ensure the selection process is fair and equitable? - **88%**

- Q2. How often are employees required to participate in compulsory DEI training? - **0%**
- Q3. Which of the following groups participate in compulsory DEI training? - **75%**
- Q5. Which of the following groups does the organisation offer other DEI training for, at least annually? - **43%**
- Q7. What other DEI training has been made available to all managers and senior leaders in the last 24 months? - **90%**

Wellbeing & Belonging

- Q2. What measures are in place to support employees' physical health and wellness? - **80%**
- Q3. What measures are in place to support employees' mental health and wellbeing? - **87%**
- Q6. How does the organisation create a psychologically safe work environment for all employees? - **88%**
- Q7. How does the organisation support all employees to feel a sense of connection and belonging? - **8%**

Working Practices

- Q7. Does the organisation have policies and practices in place for employees and prospective employees that are inclusive of the following? - **50%**
- Q8. To create and maintain an inclusive working environment, do you encourage employees to use or share their personal pronouns, e.g. in email signatures or name badges? - **0%**
- Q10. Which of the following best describes the support your organisation provides for working families? - **55%**

Talent Management & Development

- Q6. What steps does the organisation take to ensure all employees are able to engage with learning and development opportunities? - **57%**
- Q9. What steps has the organisation taken to ensure consistency and fairness in performance review/appraisal processes? - **75%**
- Q11. Which of the following are available to all employees, to support their career development? - **69%**

- Q14. Has the organisation made changes to policies and working practices following feedback received from exiting employees? - **0%**

Appendix 5

Next Steps

We hope you find this report useful. We recommend that you use the results to:

- Celebrate your achievements in the highest performing areas and share this with internal stakeholders and senior leaders.
- Reflect on the areas in need of most improvement and look at the specific questions and scores to see what actions you need to take.
- Explore Onvero's rich resources to support you in the areas for improvement.
- Reach out to your Account Manager to arrange a call with one of our Diversity and Inclusion Leads to discuss your results and decide how you will take action to learn and improve or embed and sustain.

If you have any feedback or would like to talk to an Account Manager or the Diversity and Inclusion team about supporting you to make improvements, please contact us at: info@onvero.org.uk.

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Quarter 4 Report - 2026

Report for quarter 4 of 2026. This is the first report on this strategy, having been approved in October 2025. The report outlines progress towards objectives set in the strategy. This is the annual review of progress and is shared publicly.

Objective 1: An engaged and diverse workforce

Measure of success	Accountable	2025	Current	Target
Reduce % of unknowns in Staff Equality Data	HR/E&D Officer	4.73%	4.61%	<4%
% of People Managers who have completed recruitment and selection training	HR	16.6% in person 15.6% online	68.1% in person 27.7% online	70%
Reduce gender pay gap	HR/E&D Officer	-2.85	-2.17	-2.00
Report on ethnicity and disability pay gaps	HR	Not reported on	Reported on	
% of staff responding to Employee Engagement Survey	Leadership/HR	55%	43%	70%
Achieve Armed Forces Covenant Silver Award	E&D Officer/ DERS Lead	Bronze	Silver	Silver
Gather evidence to achieve Disability Confident Leader status - Track and record reasonable adjustments for those who declare a disability - Provide disability equality awareness training - Collecting feedback from disabled staff	E&D Officer/ HR	Employer Status	Employer Status	Gather evidence for Leader Status

Amount of unknown data is decreasing, thanks to communications being sent out to prompt people to update their data. The largest gaps in data are in religion and sexuality. Further communications need to be done to improve this further, especially ahead of the next data reporting date.

Gender pay gap reduced to -2.17 this year, a smaller gap than the previous year. Most of the gap is in lower quartile earners, who are more likely to be male than female. Collaborative work between HR and the E&D Officer have started to build an

evidence base to use in Action Planning that will be a statutory requirement starting in 2027.

Ethnicity and Disability pay gap reported on for first time. Disability pay gap was very small, enough to be considered insignificant. Ethnicity pay gap is more difficult to interpret due to a greater number of small groups and non-respondents. However, from the data it would appear that those who are paid more on average are more likely to be non-respondents or of Asian ethnic minority. A large number of non-respondents are higher percentile earners.

E-learning has had a successful roll out, and so has increased the number of learning opportunities and making it easier to access by offering online learning.

Employee engagement survey participation has dropped from 55% in 2024, to 43% in 2026. Leadership are continuing work with Protostar and will develop a plan to improve engagement.

Challenges around recruiting a Veterans' Lead to support the work on Armed Forces Covenant, this has hampered progress in this area, so recruitment and retention of a Veteran's Lead will be a target for 2027.

In preparation to gain Leader Status for the Disability Confident Employer scheme, there has been engagement with the DWP to learn more about the process and to understand the steps needed and evidence gathered to write an application.

Objective 2: Creating an inclusive work environment

Measure of success	Accountability	2025	Current	Target
% of employees completed Equality & Diversity training on e-learning platform	HR/E&D officer	0%	51.3%	85%
% of staff who have completed Dignity at Work training	HR	77.2%	73.3%	85%
Progress on making recommended improvements on Town Hall as a result of Access Audit	E&D Officer/ Assets Maintenance	0%	94% of actions progressed	100% of audit completed
Progress on making recommended improvements on RAGM as a result of Access Audit	RAGM/ CO Leisure & Wellbeing		See plans for RAGM	
Commission Access Audit of WSU	E&D Officer		Conversations around timeline started	
Audit all Council websites to ensure that they meet the new Public Sector Bodies (Websites and Mobile Applications) (No. 2) Accessibility Regulations 2018	E&D Officer / IT	0/5	4/5	5/5
Relaunch the Employee Network Group	E&D Officer/Chief Officer for Wellbeing & Leisure	1 meeting held	2 new members	1 member from each service area
Improved score on TIDE report	E&D Officer/Leadership	53%	62%	66%

Improvements have started in the Town Hall, with automatic door installed internally. Further work is planned to the Council Chambers and public toilets at present, report for further work is ready to go to Cabinet to request the funds needed.

Audit of Council websites in line with Accessibility Regulations is nearly complete. With just the RAGM website requiring alt text for all of its images. Now working to include up to date accessibility information on websites.

TIDE report score has improved to 62% (up from 53%), we are now at embed level rather than implement. Largest progress made in Strategy & Planning. Achieved Bronze Award.

Employee Network Group has visited different sites to talk to employees directly to raise awareness and gain more members. Particularly focussing on services that don't currently have representatives in the group. Still need representatives from the Crematorium and WSU sites. On the request of some staff, a Neurodiversity Support Network has been launched, this group is made up of Neurodiverse staff and give advice and support to others. This group has received positive feedback from individuals who have approached them for support, so is having a measure positive impact on staff.

The recent drop in the % of staff who have completed Dignity at Work training is due to a number of new starters, these staff will complete training shortly and we expect the % to have increased again by the next report.

Objective 3: Understanding our customers and residents

Measure of success	Accountability	2025	Current	Target
Develop Cultural Knowledge Toolbox to support officers and members when engaging with local communities	E&D Officer	0	0	5
Develop a database of external stakeholders that officers can consult with on relevant projects.	E&D Officer		Database is live	
Launch a Disability Voice Forum	E&D Officer	Initial meeting held	Grant awarded to support ongoing work	
Number of Councillors who have completed EDI training	E&D Officer / Members	67%	75% (87% when new Councillors removed)	100%
Publish up to date accessibility information about each Council building on relevant websites	Communications / IT		TH BH RAGM Crem	

Percentage of Councillors who have completed EDI training has dropped to 75%, this is due to elections and arrival of new Councillors who have not had time to complete training yet. Actions as a result of this, is to engage with new Councillors now that they have had a settling in period, and request training be completed by January. Those returning Councillors who have still not completed training, despite various interventions and request, are named in Appendix 7 to the report.

A Consultation Database has been created and is included as part of the resources on the new digital EqlA, has been shared in the E&D Newsletter for Q3 to all employees, to raise awareness and to ask people to submit other organisations to the database.

A Grant has been agreed between the Council and Equip and is being processed. This guarantees the support of Equip to run the Disability Voice forum for 2 years. Furthermore, accessibility information for RAGM, the Town Hall and the Crematorium are now published on their websites.

AGENDA MANAGEMENT SHEET

Report Title:	Summer Youth Hub
Name of Committee:	Cabinet
Date of Meeting:	3 November 2026
Report Director:	Strategic Director - Communities
Portfolio:	Communities, Housing and Safety
Ward Relevance:	Benn
Prior Consultation:	Community Safety Partnership Board
Contact Officer:	Paul Pritchett - Environmental Health and Community Safety Manager
Public or Private:	Public
Report Subject to Call-In:	No
Report En-Bloc:	No
Key Decision:	No
Corporate Priorities:	This report relates to the following priority(ies): ☐ A Healthier Rugby – To support people to live healthier, longer, and more independent lives. ☒ A Thriving Rugby – To deliver a thriving economy which brings Borough-wide investment and regenerates Rugby Town Centre. ☐ A Greener Rugby – To protect the environment and ensure the Borough adapts to climate change. ☐ A Fairer Rugby – To reduce inequalities and improve housing across the Borough. Corporate Strategy 2025-2035 ☐ This report does not specifically relate to any Council priorities.
Summary:	This report tells Cabinet about the Rugby Summer Youth Hub, a partnership project the Council led in the town centre over the 2026 summer holidays. It sets out what the Hub provided, what it achieved and what young people said about it. The Project Outcomes Summary is attached as Appendix 1.
Local Government Reorganisation Implications:	Reorganisation proposals for Warwickshire are currently paused pending the Government-wide

review announced on 7 September 2026. Any future youth provision would be delivered through the Community Safety Partnership, which continues under its existing statutory arrangements. This report therefore has no direct implications for reorganisation.

Financial Implications:

The Hub was funded through £15,000 of Home Office Serious Violence Duty grant, given to the Rugby Community Safety Partnership. Any other Council costs were incidental and met within existing budgets, and officer and Community Warden support was given as part of business as usual. Rugby Central provided the unit free of charge, and partners and local businesses contributed equipment, refreshments and volunteer time. This report has no further financial implications.

Risk Management/Health and Safety Implications:

None arising from this report. The Hub was delivered within a multi-agency safeguarding framework. Staff and volunteers from partner agencies held appropriate DBS checks and worked to agreed safeguarding protocols, and information was shared under the Warwickshire Community Safety Data Sharing Agreement.

Environmental Implications:

The Hub reused an empty town centre unit and donated equipment.

Legal Implications:

None arising from this report, which is for information only. The Hub supported the Council's duties under the Serious Violence Duty (Part 2, Chapter 1 of the Police, Crime, Sentencing and Courts Act 2022) and section 17 of the Crime and Disorder Act 1998.

Equality and Diversity:

No specific implications. The Hub was free and open to all young people aged 11 and over, and their parents and carers, in an accessible town centre location. It had a positive impact on young people, a group protected by the Equality Act 2010 on grounds of age. No Equality Impact Assessment is needed because this report is for information only.

Options:

To note the report.

Recommendation:

The delivery and outcomes of the Rugby Summer Youth Hub, as set out in this report and Appendix 1, be noted.

**Reasons for
Recommendation:**

To inform Cabinet of the success of the Rugby Summer Youth Hub, delivered through the Rugby Community Safety Partnership, and of the Council's role in it.

Cabinet - 3 November 2026

Summer Youth Hub

Public Report of the Strategic Director - Communities

Recommendation

The delivery and outcomes of the Rugby Summer Youth Hub, as set out in this report and Appendix 1, be noted.

1. Executive Summary

- 1.1 Between 22 July and 31 August 2026, the Rugby Community Safety Partnership ran the Rugby Summer Youth Hub, a free drop-in space for young people in Rugby Central shopping centre. It was led by the Council's Community Safety team, working with Guiding Young Minds, Warwickshire Police, local youth providers and other partners, and was funded by £15,000 of Home Office Serious Violence Duty grant.
- 1.2 The Hub gave young people a safe place to socialise and take part in activities. It also gave them access to advice and support on staying safe, including on knife crime, exploitation and anti-social behaviour. More than 520 young people visited. Of the 64 who rated it on The Hub feedback forms 61 said their experience was excellent or good. Asked where they would have been without the Hub, the most common answer was hanging around the town centre.
- 1.3 The Hub was featured by BBC News. It shows how prevention and youth engagement can work alongside enforcement to keep Rugby town centre safe. Decisions about whether to run it again rest with the Community Safety Partnership Board.

2. Background

- 2.1 In 2025/26 the town centre saw more anti-social behaviour involving young people than in 2024/25, some of it escalating. A multi-agency police operation identified more than 50 young people involved. A youth survey found that young people wanted more to do and did not know much about the youth provision available in the Borough. Young people are a priority in the Rugby Community Safety Partnership Plan 2025-2029, and the Serious Violence Duty requires partners to work together to prevent serious violence.
- 2.2 In response, the Community Safety Partnership used its 2026/27 Home Office Serious Violence Duty grant to set up the Summer Youth Hub. Rugby Central gave free use of an empty shop unit in the shopping centre. The Hub was open to young people aged 11 and over, and to parents and carers. It was

launched with leafleting in the town centre on 17 and 18 July and opened on 22 July.

- 2.3 The Hub ran 17 sessions across the summer holidays, mostly in the afternoons and early evenings, when young people were most likely to be in the town centre. Sessions included activities, virtual reality experiences on knife crime and violence, and information and advice from partners. Guiding Young Minds also ran outreach from its van. Partners included Warwickshire Police, Guiding Young Minds, the Hill Street Youth and Community Centre, Warwickshire County Council, Orbit (a housing association), Assist Trauma Care (a charity run by Guiding Young Minds that supports people affected by trauma), GLL (Greenwich Leisure Limited, the Council's leisure centre operator) and Rugby Central security, with the Council's Community Safety team and Community Wardens. The Community Wardens alone gave 51 hours across the 17 sessions.

3. Outcomes

Reach and delivery

- 3.1 More than 520 young people visited the Hub over 17 sessions. 131 young people took part in surveys: 38 through the Council and 93 through Warwickshire Police. The Hub delivered 35 virtual reality sessions, using six hours of footage, which helped young people understand the consequences of violence and knife crime.

What young people said

- 3.2 Feedback was very positive. Of the 64 young people who rated their experience on The Hub feedback forms, 61 said it was excellent (39) or good (22). Of those asked whether The Hub helped keep them occupied and out of trouble, 25 out of 28 said it did, 15 of them "definitely". Of the young people surveyed by Warwickshire Police, 37 out of 38 found the Hub helpful or enjoyable, or got information or support there.
- 3.3 When asked where they would have been without the Hub, the most common answer was hanging around the town centre (30 of 64). Others said they would have been in a park or open space (10), with friends elsewhere (9), or gaming or on social media at home (7). This does not prove the Hub prevented anti-social behaviour. It does show that it gave young people somewhere to go other than unstructured time in the town centre, during the period when they are most likely to be there.

What young people told us about Rugby

- 3.4 The surveys also gave the Partnership useful insight into how young people see the town. Asked what would make Rugby safer, they most often said more police patrols (13), CCTV (10), more youth clubs and activities (8), and better lighting and safer alleyways (7). The concerns they raised most often were groups of young people and gangs, vaping, alcohol, and violence including knives. Asked what they would like to see in Rugby, they most often mentioned parks, skateparks and outdoor spaces (14), followed by clubs and

youth venues (11) and sports (9).

- 3.5 The Partnership will use this feedback to inform its work, including the Town Centre CCTV Upgrade Programme and future youth engagement.

4. Acknowledgements

- 4.1 The Hub's success depended on many organisations and individuals giving their time, resources and goodwill. Thanks go to Rugby Central for the free use of the unit, to Guiding Young Minds, Warwickshire Police and all the partner organisations who attended, and to the local businesses and volunteers who donated equipment and gave their time. Thanks also go to the Council's Community Safety team and Community Wardens, who set up and ran the Hub, and above all to the young people of Rugby who used it and shared their views.

5. Conclusion

- 5.1 The Rugby Summer Youth Hub showed what the Community Safety Partnership can achieve when partners pool their resources around a shared priority. More than 520 young people came to a safe, positive space in the town centre during the summer holidays, and almost all who gave feedback rated it highly. The Hub cost the Council very little beyond officer time, and it showed that early help and engagement can complement enforcement. Officers will report to the Community Safety Partnership Board on any future delivery.

Appendices

Appendix 1 - Rugby Summer Youth Hub, Project Outcomes Summary (as presented to the Rugby Community Safety Partnership Board, 29 September 2026)

Name of Meeting: Cabinet

Date of Meeting: 3 November 2026

Subject Matter: Summer Youth Hub

Originating Department: Communities

DO ANY BACKGROUND PAPERS APPLY

☐ YES

☒ NO

LIST OF BACKGROUND PAPERS

Doc No	Title of Document and Hyperlink

The background papers relating to reports on planning applications and which are open to public inspection under Section 100D of the Local Government Act 1972, consist of the planning applications, referred to in the reports, and all written responses to consultations made by the Local Planning Authority, in connection with those applications.

☐ Exempt information is contained in the following documents:

Doc No	Relevant Paragraph of Schedule 12A



RUGBY SUMMER YOUTH HUB

Community Safety Partnership

Rugby Summer Youth Hub

PROJECT OUTCOMES SUMMARY

The Rugby Summer Youth Hub successfully provided a positive, safe and engaging space for young people in Rugby town centre, bringing together youth engagement, activities, support and safety-focused partnership work.

Young people overwhelmingly valued the hub as a place to socialise, take part in activities and spend time safely.

Young people said that without the Hub they would have been spending unstructured time in the town centre. The feedback suggests that positive youth provision can sit alongside enforcement as part of a preventative approach.

Feedback points towards continued demand for activities, safe spaces and trusted support – creating an opportunity for stronger links between youth services, community safety, policing, schools, sport and community organisations.

At a Glance

Participation, delivery and outcomes

520

Young people engaged with the Hub

Based on registration sheets completed during the sessions

131

Young people surveyed

38 Rugby Borough Council responses / 93 Police responses

35

VR sessions delivered

6 hours of footage

61/64

Rated their experience excellent or good

39 excellent / 22 good

25/28

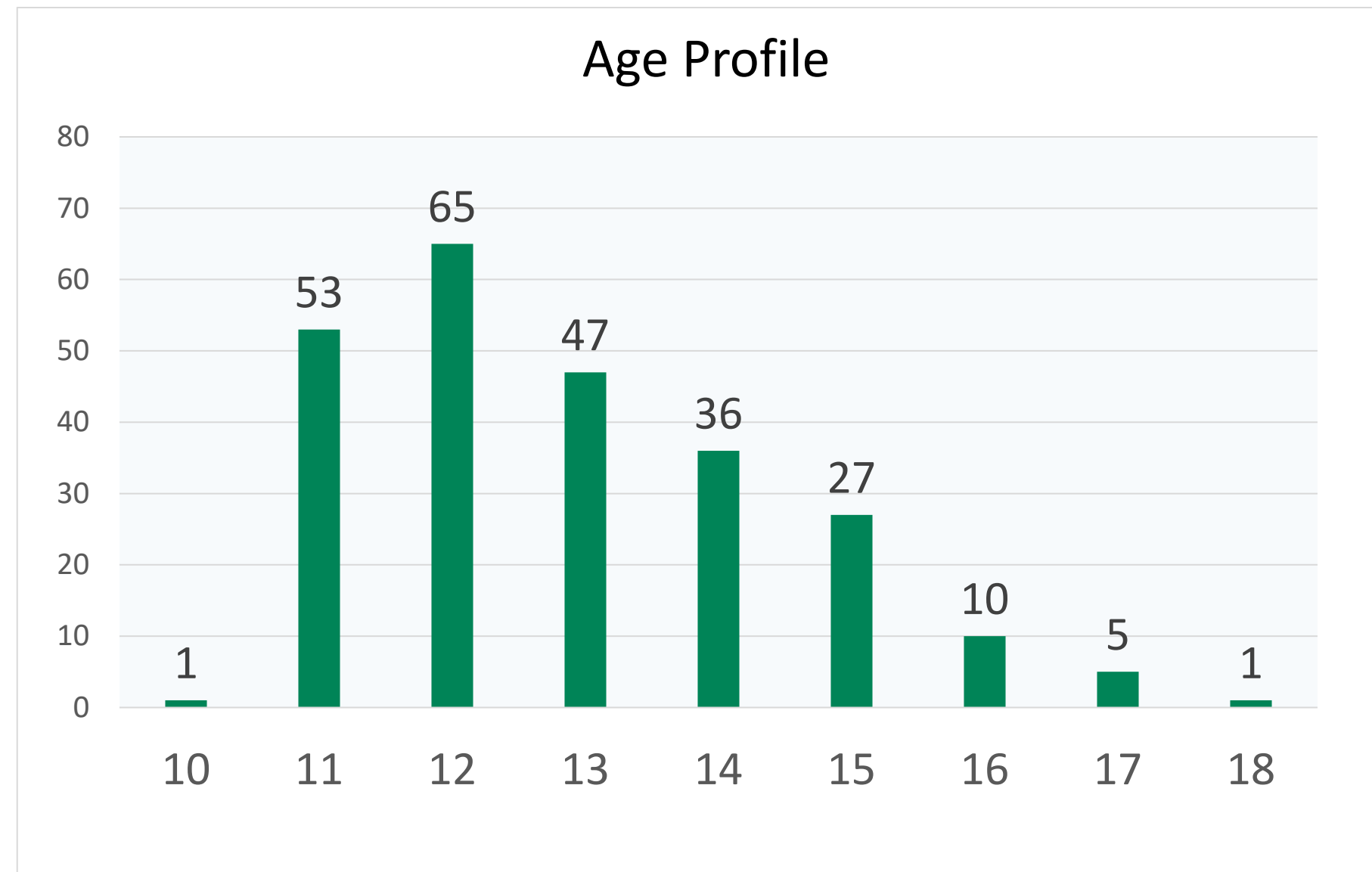
Young people said the Hub helped kept them occupied and away from trouble

15 definitely / 10 a little

37/38

Police survey respondents found the Hub helpful or enjoyable, or received information or support

Attendance: Age Profile



Young people aged 11-14 represented 82% of records containing a valid age.

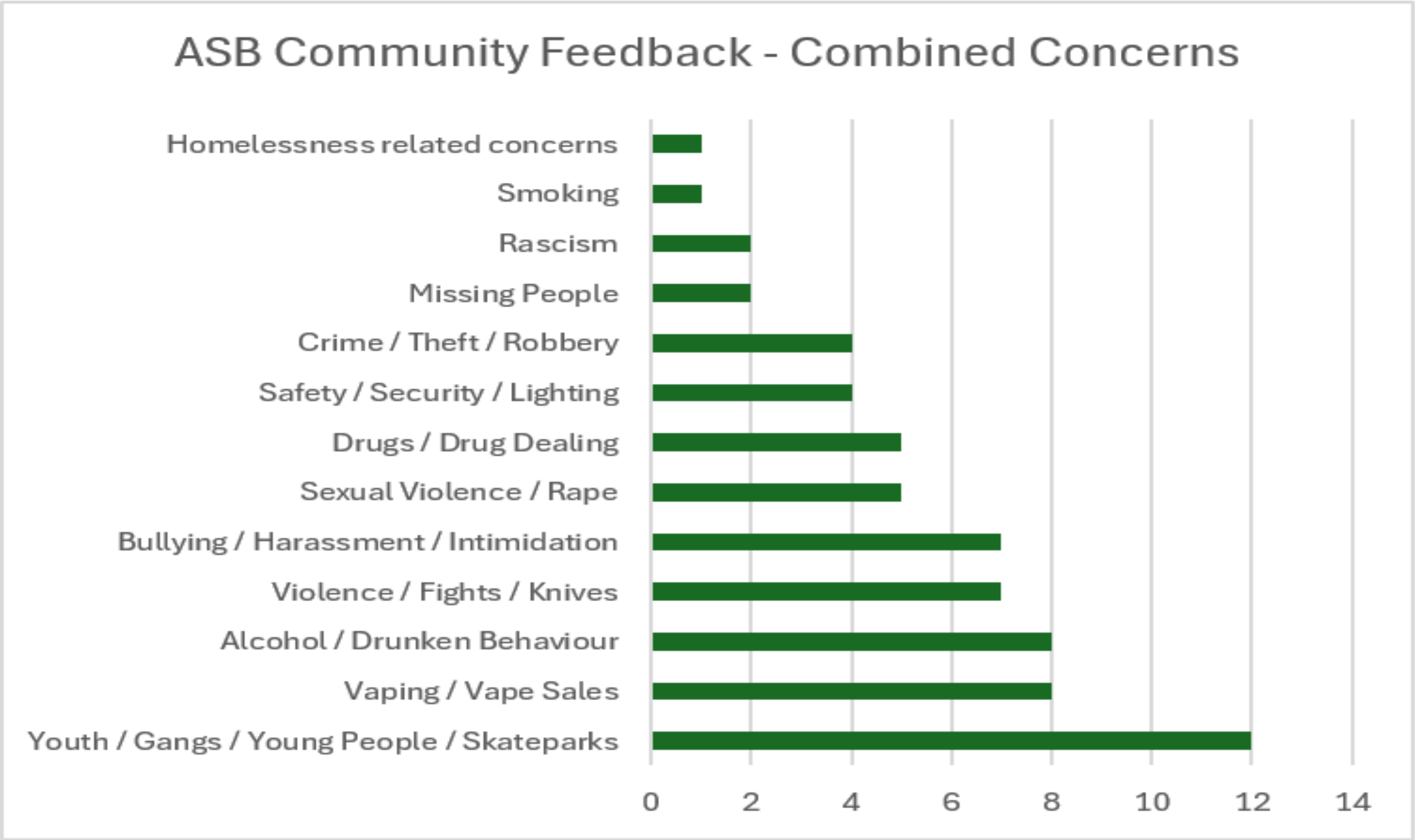
What Young People Value



Parks, green spaces and having friends nearby were the most frequently valued features.

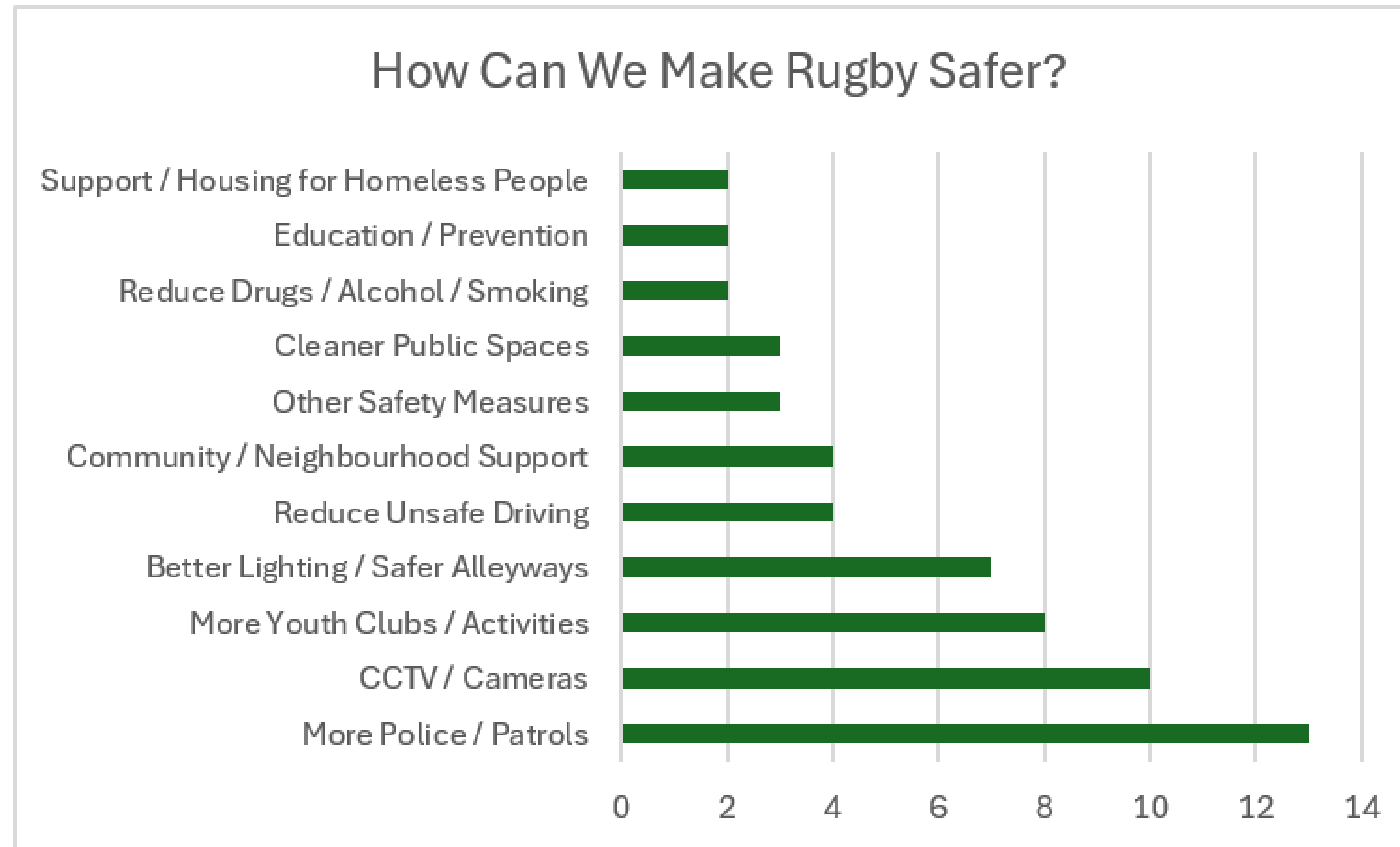
Safety and Serious Violence

PERCEPTIONS



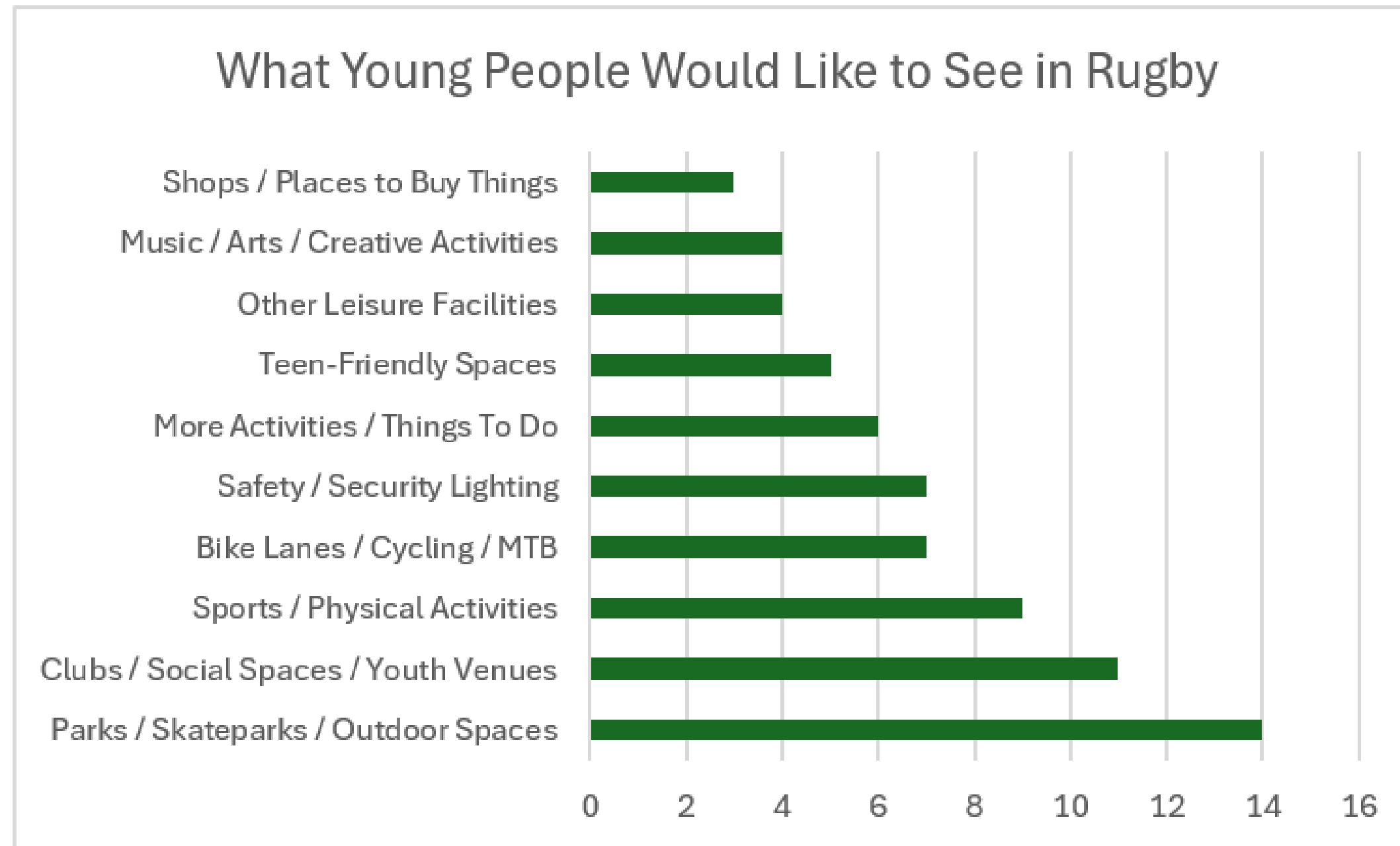
Concerns most frequently related to young people or gangs, followed by alcohol and vaping.

General Safety Concerns



More police patrols and CCTV were the leading suggestions, alongside increased youth activities.

Areas for Improvement



Outdoor spaces, youth venues and sports were the most requested improvements.

Without The Hub

IF THE HUB HAD NOT BEEN AVAILABLE....

Of responses to this question:

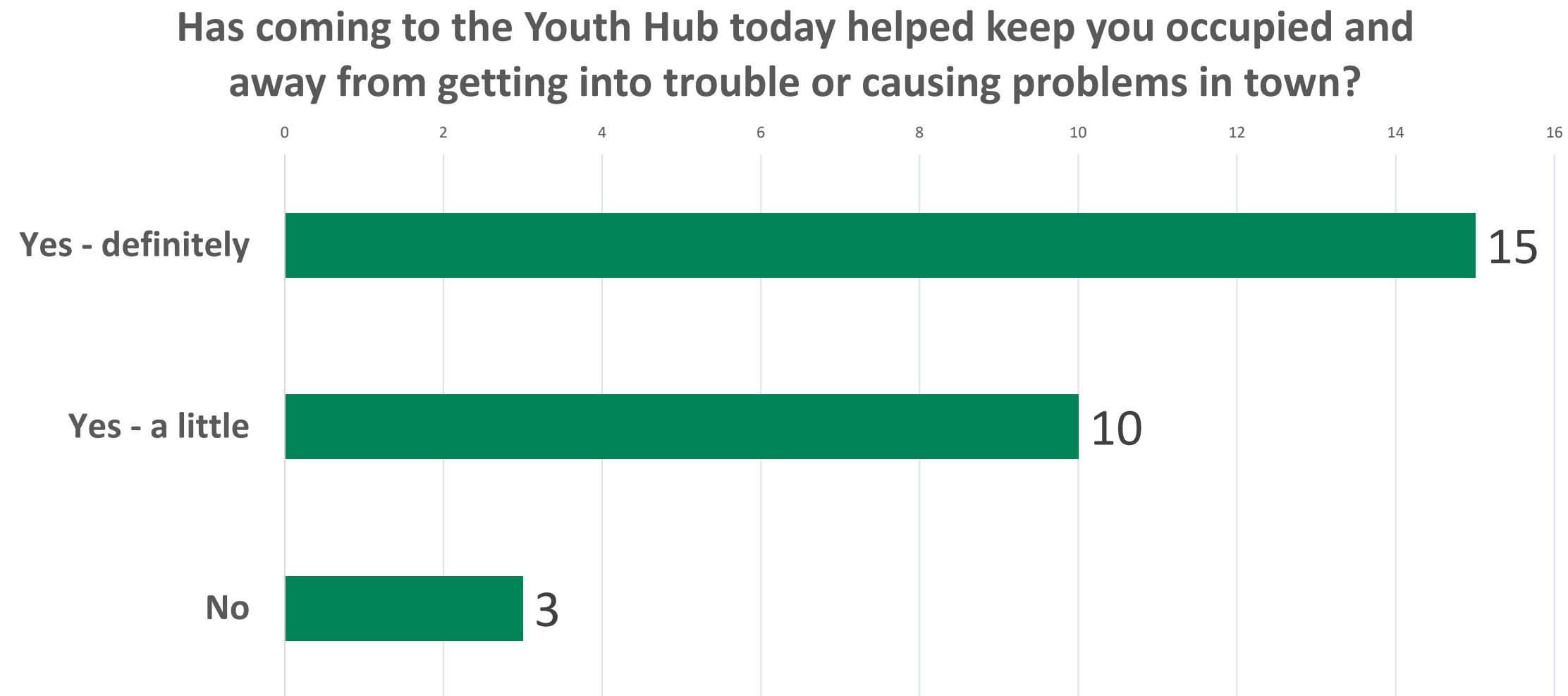
- 30 would have been hanging around the town centre
- 10 would have been in a park/open space
- 9 would have been with friends somewhere else
- 7 would have been gaming/on social media at home
- 8 selected other

Why this matters?

The Hub provided a practical alternative to unstructured time in the town centre and created an opportunity to engage young people before concerns escalate. This was particularly relevant given safety concerns raised elsewhere in the surveys.

Reported Impact

IF THE HUB HAD NOT BEEN AVAILABLE....



89% of responses reported that the Hub had helped at least to some extent.

The Opportunity For Rugby

The hub has demonstrated that young people will engage when Rugby provides somewhere positive, safe and welcoming to go.

- **Engage:** Give young people something positive to do.
- **Prevent:** Create alternatives to unstructured activity and provide early support.
- **Connect:** Build relationships between young people, services and the wider community.

The opportunity now is to turn a successful summer intervention into a sustainable part of Rugby's approach to youth engagement and community safety.

Good News Stories

HOW TO HUB MADE A DIFFERENCE...

A young person who had lost their phone approached a warden they recognised from the Hub. The warden reassured them, contacted their parents and stayed until they arrived. Familiarity with the Hub helped help the young person know where to seek help.

A family had previously been concerned about their daughter visiting the town centre without them. After seeing the Hub and hearing their daughter's positive feedback, they left confident allowing her to attend with friends.

A young person who rarely left home began attending the Hub with their parents. Over time, they joined activities, spoke with staff and became a regular visitor.

A teenager who was initially reluctant to speak with others joined an art activity alongside a warden. They gradually began talking, participating in games and interacting confidently with the group.

Good News Stories

WIDER POSITIVE OUTCOMES...

Wardens called to a group of youths being disruptive , Wardens attended and they were recognised from the hub, due to this they gave the team respect apologised and moved on.

Parents expressed in the hub how the hub had made their children's summer a positive experience and thanked all staff

One young person discovered an interest in art through the Hub, completed several pieces and displayed their work. The experience increased their confidence and encouraged them to consider Art at GCSE.

A group of youths were in the car park on bikes, wardens attended and they left with respect after recognising the team from the Hub.

Young people said the Hub gave them something constructive to do, including learning new skills, playing sports and making new friends.

Positive comments from the businesses in the Clock Towers to say great to see the youths having the Hub, made them see a positive outcome from the youths.

Learned new skills and played sports with new friends

AGENDA MANAGEMENT SHEET

Report Title:	Write Offs
Name of Committee:	Cabinet
Date of Meeting:	3 November 2026
Report Director:	Chief Financial Officer
Portfolio:	People, Resources and Governance
Ward Relevance:	All Wards
Prior Consultation:	None
Contact Officer:	Colin Jones, Interim Revenues and Benefits Manager colin.jones@rugby.gov.uk
Public or Private:	Public
Report Subject to Call-In:	Yes
Report En-Bloc:	Yes
Key Decision:	No
Corporate Priorities:	This report relates to the following priority(ies): ☐ A Healthier Rugby – To support people to live healthier, longer, and more independent lives. ☐ A Thriving Rugby – To deliver a thriving economy which brings Borough-wide investment and regenerates Rugby Town Centre. ☐ A Greener Rugby – To protect the environment and ensure the Borough adapts to climate change. ☐ A Fairer Rugby – To reduce inequalities and improve housing across the Borough. Corporate Strategy 2025-2035 ☐ This report does not specifically relate to any Council priorities but
Summary:	This report provides the first 2026/27 update on debt write-offs. It reports write-offs made under delegated authority and seeks approval for those requiring Cabinet approval under the revised write off policy.
LGR Implications:	None

Financial Implications:	Write offs of irrecoverable debts. The relevant bad debt provision is £13.483m and the remaining provision after these write offs is £11.983m.
Risk Management/Health and Safety Implications:	There are no risk management implications arising from the report and no Climate Change impact Assessment is required.
Environmental Implications:	There are no environmental implications arising from this report and no Climate Change impact Assessment is required.
Legal Implications:	The relevant powers for this report are contained within the following legislation: Section 151 Local Government Act 1972 Section 44 Local Government Finance Act 1988 (Non-Domestic Rate) Section 14 Local Government Finance Act 1992 (Council Tax) At present, in respect of the amounts listed there are no further implications, assets associated with the debt and associated/additional debt recovery operations will cease. Where the Council are provided with circumstantial changes or information which provides options for successful recovery, the amount may be written back onto the Council's systems and accounts for collection. The Chief Officer of Legal and Governance consider the proposed write-offs to be in accordance with the council's procedures and lawful.
Equality and Diversity:	All write-offs are considered with due regard to any potential equality and diversity impact and on their own merits. This decision has been judged to have no or a very small impact on local people and communities and an EDIA is not required.
Options:	1. Approve the write-offs at Appendix A and note the write offs made under delegated authority. 2. Do not approve some or all of Appendix A. Those debts would remain outstanding.
Recommendation:	The write-offs detailed at Appendix A which require Cabinet approval be approved, and the writes offs made under delegated authority to date be noted.
Reasons for Recommendation:	The debts requiring approval ave been assessed as uncollectable. Reporting delegated write-offs to

Cabinet also meets the reporting arrangements set out in the Councils write off policy.

Cabinet - 3 November 2026

Write Offs

Public Report of the Chief Financial Officer

Recommendation

The write-offs detailed at Appendix A which require Cabinet approval be approved, and the write-offs made under delegated authority to date be noted.

1. Background

- 1.1 A revised Write Off Policy came into effect in May 2026. The policy requires all reasonable and economical recovery action be taken before a debt is considered for write off.
- 1.2 Under the revised arrangement, debts up to £10,000 may be approved under officer delegation. Debts over £10,000 require Cabinet approval unless an officer delegation applies irrespective of value, such as insolvency.
- 1.3 The policy also requires the amounts written off under delegated authority to be reported to Cabinet twice each year, together with any write-offs that require Cabinet approval.
- 1.4 This is the first update for 2026/27.

2. Write-offs under delegated authority

- 2.1 The total amount of £1.312m has been written off under delegated authority so far in 2026/27. The position by debt type is shown below:

Debt Type	Amount written off	Bad Debt Provision
Council Tax	£548,304.51	£7,996,700.00
Non-Domestic Rates	£187,876.77	£901,200.00
Housing Benefit Overpayment	£307,861.56	£1,329,430.42
Sundry Debts	£267,511.53	£1,242,789.02
Housing	n/a	£2,013,121.53
Council Tax & Business Rates Costs	n/a	£766,366.99
TOTAL	£1,311,554.37	£13,483,240.97

- 2.2 The officer approved write-offs is also shown below according to the reason for the write-off. This gives Cabinet a clearer picture of why debts have been written off, rather than only showing the type of debt.

Write off reason	Number of debts	Value
Insolvency	456	£789,295.81
Deceased	206	£122,677.39
Whereabouts not known	146	£116,615.59
Unrecoverable due to age of debt	496	£592,215.80
Vulnerable	13	£7,926.05
Uneconomical to pursue	44	£19,420.74
Other (reversals, write backs, credits)	704	(£336,597.01)
TOTAL	2,065	£1,311,554.37

- 2.3 A write-off removes a debt which is no longer considered recoverable. It does not mean recovery action was not taken. Where circumstances later change and recovery becomes possible, the debt may be re-raised where appropriate.

3. Write-offs requiring Cabinet approval

- 3.1 This report contains a further £187,956.93 of write-offs. The individual debts and reasons for write-off are set out in Appendix A.
- 3.2 The debts presented for approval have only been included once all appropriate recovery action has been exhausted and there is no reasonable prospect of recovery.

4. Financial Implications

- 4.1 For Council Tax and Business Rates, the bad debt provision shown in the Council's accounts represents Rugby Borough Council's share of the Collection Fund impairment rather than the total provision against the underlying debt. The financial impact of write-offs on the Council's provision is therefore limited to the Council's corresponding share of those write-offs.
- 4.2 The relevant bad debt provision for the debts covered by this report is £13.483m. Following the write-offs already processed and any write-offs approved by Cabinet, the remaining provision will be £11.983m
- 4.3 The bad debt provision is an accounting estimate of debt which may not ultimately be collected. It is reviewed as part of the year-end closedown process to ensure it remains sufficient for the expected future risk.

Name of Meeting: Cabinet

Date of Meeting: 3 November 2026

Subject Matter: Write Offs

Originating Department: Chief Executive's Directorate

DO ANY BACKGROUND PAPERS APPLY

☐ YES

☒ NO

LIST OF BACKGROUND PAPERS

Doc No	Title of Document and Hyperlink

The background papers relating to reports on planning applications and which are open to public inspection under Section 100D of the Local Government Act 1972, consist of the planning applications, referred to in the reports, and all written responses to consultations made by the Local Planning Authority, in connection with those applications.

☐ Exempt information is contained in the following documents:

Doc No	Relevant Paragraph of Schedule 12A

Appendix A - Write-offs requiring Cabinet approval

Cabinet - 3 November 2026

Total proposed for Cabinet approval	£187,956.93	Debtor cases requiring approval	10
Debt lines in schedule	12	Cases using cumulative £10,000 test	2

Only debts requiring Cabinet approval are listed. The £10,000 threshold is applied cumulatively per debtor. Rows sharing the same case number relate to the same debtor. Names, addresses and account references are excluded.

Case	Debt type	Debt period / nature	Recovery action undertaken	Reason for write-off	Amount proposed	Cumulative debtor total
Case 1	Housing Benefit Overpayment	14.04.2003 - 20.02.2011	County Court judgment	Unable to trace debtor	£22,199.34	£22,199.34
Case 2	Housing Benefit Overpayment	06.06.2005 - 29.11.2009	County Court judgment	Unable to trace debtor	£23,683.00	£23,683.00
Case 3	Housing Benefit Overpayment	11.08.2008 - 02.01.2011	County Court judgment	Unable to trace debtor	£12,162.30	£12,162.30
Case 4	Housing Benefit Overpayment	15.09.2014 - 18.06.2017	Deductions from Earnings Order	Unable to trace debtor	£13,224.49	£13,224.49
Case 5	Non-Domestic Rates	01.12.2022 - 30.11.2025	Enforcement agents	Debtor in prison	£24,480.52	£24,480.52
Case 6	Sundry Debt	Rechargeable works to clear property, March 2023	with external collection agents	Vulnerability considerations (mental health) and all appropriate recovery action has been exhausted	£21,451.57	£21,451.57
Case 7	Sundry Debt	Clearance of property after eviction	with external collection agents	Unable to trace debtor	£9,893.93	£13,322.39
	Council Tax	30.05.2017 - 08.11.2020	Enforcement agents	Unable to trace debtor	£3,428.46	
Case 8	Housing Benefit Overpayment	01.02.2011 - 09.10.2016	with external collection agents	Unable to trace debtor	£32,427.27	£32,427.27
Case 9	Housing Benefit Overpayment	14.06.2010 - 01.03.2015	Deductions from Earnings Order	Vulnerability considerations (age) and all appropriate recovery action has been exhausted	£12,470.46	£12,470.46
Case 10	Council Tax	01.04.2016 - 21.10.2019	Enforcement agents	Unable to trace debtor	£2,361.20	£12,535.59
	Housing Benefit Overpayment	17.11.2014 - 21.08.2016	with external collection agents	Unable to trace debtor	£10,174.39	
Total requiring Cabinet approval					£187,956.93	£187,956.93

Summary by debt type		
Debt type	Debt lines	Amount
Council Tax	2	£5,789.66
Housing Benefit Overpayment	7	£126,341.25
Non-Domestic Rates	1	£24,480.52
Sundry Debt	2	£31,345.50
Total	12	£187,956.93

- Notes
- The £10,000 Cabinet approval threshold is applied to the cumulative amount proposed for write-off for each debtor, not to each individual debt line.
 - Case 7 contains two separate debts below £10,000 which together total £13,322.39 and therefore require Cabinet approval.
 - Names, addresses and account references are excluded from this appendix. Personal circumstances have been minimised to what is necessary to explain the write-off.
 - Write-offs made under officer delegation are reported separately in the main Cabinet report. Bad debt provision information is also dealt with in the main report.