

Public Document Pack



**Service Director – Legal, Governance and
Commissioning**

Julie Muscroft

The Democracy Service
Civic Centre 3
High Street
Huddersfield
HD1 2TG

Tel: 01484 221000

Please ask for: Andrea Woodside

Email: andrea.woodside@kirklees.gov.uk

Monday 26 February 2018

Notice of Meeting

Dear Member

Cabinet

The **Cabinet** will meet in the **Council Chamber - Town Hall, Huddersfield** at **10.30 am** on **Tuesday 6 March 2018**.

This meeting will be live webcast. To access the webcast please go to the Council's website at the time of the meeting and follow the instructions on the page.

The items which will be discussed are described in the agenda and there are reports attached which give more details.

A handwritten signature in black ink, appearing to read "Julie Muscroft", on a light-colored background.

Julie Muscroft

Service Director – Legal, Governance and Commissioning

Kirklees Council advocates openness and transparency as part of its democratic processes. Anyone wishing to record (film or audio) the public parts of the meeting should inform the Chair/Clerk of their intentions prior to the meeting.

The Cabinet members are:-

Member

Councillor David Sheard

Councillor Shabir Pandor

Councillor Peter McBride

Councillor Naheed Mather

Councillor Musarrat Khan

Councillor Erin Hill (Currently on
Maternity Leave)

Councillor Viv Kendrick

Councillor Masood Ahmed

Councillor Graham Turner

Councillor Cathy Scott

Responsible For:

Leader of the Council with shared Portfolio for Strategy and Strategic Resources, New Council & Regional Issues (Cabinet Lead on Democracy Commission)

Deputy Leader of the Council with shared Portfolio for Strategy and Strategic Resources, New Council & Regional Issues

Cabinet Member - Economy (Strategic Planning, Regeneration and Transport)

Cabinet Member - Economy (Strategic Housing, Regeneration and Enforcement)

Cabinet Member - Corporate (Place, Environment and Customer Contact Services)

Cabinet Member - Currently on Maternity Leave

Cabinet Member - Children (Statutory responsibility for Children)

Cabinet Member - Children

Cabinet Member - Corporate (Place, Environment and Customer Contact Services)

Cabinet Member - Adults and Public Health (Statutory Responsibility for Adults & Public Health)

Agenda

Reports or Explanatory Notes Attached

Pages

1: Membership of the Committee

To receive apologies for absence of Members who are unable to attend this meeting.

Cllr Hill is currently granted leave of absence.

2: Minutes of previous meeting

1 - 4

To approve the Minutes of the meeting of the Committee held on 30 January 2018.

3: Interests

5 - 6

The Councillors will be asked to say if there are any items on the Agenda in which they have disclosable pecuniary interests, which would prevent them from participating in any discussion of the items or participating in any vote upon the items, or any other interests.

4: Admission of the Public

Most debates take place in public. This only changes when there is a need to consider certain issues, for instance, commercially sensitive information or details concerning an individual. You will be told at this point whether there are any items on the Agenda which are to be discussed in private.

5: Deputations/Petitions

The Committee will receive any petitions and hear any deputations from members of the public. A deputation is where up to five people can attend the meeting and make a presentation on some particular issue of concern. A member of the public can also hand in a petition at the meeting but that petition should relate to something on which the body has powers and responsibilities.

In accordance with Council Procedure Rule 10 (2), Members of the Public should provide at least 24 hours' notice of presenting a deputation.

6: Public Question Time

The Committee will hear any questions from the general public.

7: Member Question Time

To consider questions from Councillors.

8: Bereavement Services - Fees and Charges Review

7 - 30

A report seeking Cabinet approval to introduce an updated business model and charging structure for Bereavement Services which covers the next 5 year period.

Ward: All

Officer: Sarah Durdin, Operational Manager Tel: 01484 221000

9: Extra Care Housing - Restaurant Facility

31 - 38

A report seeking approval to introduce a service charge to contribute towards the cost of providing the restaurant service at the schemes.

Ward: All

Officer: Sue Dunn, Client Manager, Tel 01484 221000

Contact Officer: Andrea Woodside

KIRKLEES COUNCIL

CABINET

Tuesday 30th January 2018

Present: Councillor David Sheard (Chair)
Councillor Shabir Pandor
Councillor Peter McBride
Councillor Naheed Mather
Councillor Musarrat Khan
Councillor Viv Kendrick
Councillor Masood Ahmed
Councillor Graham Turner

Observers: Councillor Bernard McGuin
Councillor John Taylor

Apologies: Councillor Erin Hill (Currently on Maternity Leave)
Councillor Cathy Scott

411 Membership of the Committee

Apologies for absence were received on behalf of Councillors Scott and Hill.

412 Interests

No interests were declared.

413 Admission of the Public

It was noted that all agenda items would be considered in public session.

414 Deputations/Petitions

No deputations or petitions were received.

415 Public Question Time

No questions were asked.

416 Member Question Time

Cabinet received questions from Councillor McGuin in relation to (i) the implications of the development of the museum quarter upon Tolson Museum, and (ii) how the Council would ensure that local residents accessing their homes located on the bus lanes in Almondbury would not receive penalty notices.

417 Schools Forum: Report seeking approval for Kirklees School Funding formula for the financial year 2018/19

Cabinet gave consideration to a report which provided detail on the formal introduction of the National Funding Formula for schools from 2020/2021, and how this would impact upon local schools' funding formula for 2018/2019.

The report recommended the outline of the Kirklees funding formula 2018/2019 in terms of (i) specific funding factors to be used and the relative weightings and

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values of the funding factors (ii) exceptions applications submitted to the Education and Skills Funding Agency, and the approvals given (iii) central budget provision within the Dedicated Schools Grant Schools Block of funding, the Central School Services Block and the Early Years Block and (iv) de-delegation arrangements for mainstream maintained schools.

Cabinet were asked to give approval to the outline details of the Kirklees School Funding Formula for 2018/2019 to be submitted by the deadline of 19 January 2018.

Cabinet were advised that, based upon the Education and Skills Funding Agency funding timeline, it was expected that the local authority would inform maintained schools of their 2018/2019 budgets by 28 February 2018, and that academies would be informed by 31 March 2018.

RESOLVED -

- (1) That the changes to school funding arrangements for the two 'soft' National Funding Formula funding years of 2018-2019 and 2019-2020, leading to the full introduction of the National Funding Formula for Schools from April 2020, be noted.
- (2) That the ongoing local consultation with schools and other providers in order to ensure an appropriate local response to national funding formula developments, be noted.
- (3) That the exceptions applications made to the Education and Skills Funding Agency, as detailed in paragraph 5 of the considered report, be noted.
- (4) That approval be given to the submission of the schools funding formula for 2018/2019 (based upon a positive minimum funding guarantee of 0.5% per pupil) to the Education and Skills Funding Agency.

418 Council Annual Budget Report 2018-22 incorporating Capital, Treasury Management, General Fund, Revenue and Housing Revenue Account
(Cabinet noted the provisions on the restrictions on voting, in accordance with Section 106 of the Local Government and Finance Act 1992, relevant to this item).

(Under the provision of Council Procedure Rule 36 (1) Cabinet received a representation from Councillor J Taylor).

Cabinet received a report which set out its recommendation to the meeting of Budget Council on 14 February 2018, and provided the basis upon which other political groups could consider their budget proposals for Capital, Treasury Management, General Fund Revenue and the Housing Revenue Account.

Cabinet noted that the report;

- (i) reviewed the general fund revenue budget strategies over the medium term financial plan and budget proposals to achieve a balanced general fund revenue budget in 2018-2019, and an indicative revenue budget plan for the following year.

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- (ii) incorporated the Government's announcement on the Local Government Finance Settlement for 2018-2019 and indicative government funding forecasts for the following year, and consider the level of general fund revenue budget needed for Treasury management and Central Contingencies.
- (iii) reviewed the current levels of general fund revenue reserves and balances and made recommendations on the level of reserves.
- (iv) incorporated Housing Revenue Account (HRA) budget proposals to achieve a balanced HRA in 2018-2019, and indicative revenue budget plan for the following year, informed by the HRA 30 year business plan.
- (v) reviewed the current levels of Housing Revenue Account reserves, and made recommendations on the level of reserves.
- (vi) reviewed the multi-year plan for Capital Investment (Cabinet is required under Financial Procedure Rules to recommend to Council a multi-year plan for capital investment).
- (vii) reviewed the Treasury Management Strategy 2018-2019 (which Council must consider before the start of the financial year to comply with both the Chartered Institute of Public Finance and Accountancy (CIPFA) Code of Practice on Treasury Management, and with Department for Communities and Local Government (DCLG) guidance on local authority investments, requiring the Council to approve an Investment Strategy before the start of each financial year).
- (viii) made recommendations on the Council Tax requirement for 2018-2019.
- (ix) incorporated the Council's Pay Policy Statement for 2018-2019.
- (x) incorporated a statement of assurance from the Council's statutory s151 officer in relation to the robustness of budget estimates and adequacy of General Fund and HRA reserves.

RESOLVED - That the Motion be submitted to the Meeting of Budget Council on 14 February 2018 with a recommendation that;

- (i) Capital
 - the draft Capital Plan 2018-2023 be approved (appendix E)
 - the Prudential Indicators as detailed at appendix F be approved
- (ii) Treasury Management (Appendix C)
 - the borrowing strategy be approved (paragraphs 2.12-2.18 refer)
 - the investment strategy be approved (paragraphs 2.19-2.33 refer)
 - the policy for provision of repayment of debt (minimum revenue provision/MPR) be approved (appendix C refers, reflecting the changes in policy outlined in paragraphs 2.34-2.66) effective from 2017-2018, be approved
 - the treasury management indicators be approved (appendix C refers)
 - proposals to refresh the treasury management strategy for financial year 2019-2020 to reflect revised 2017 CIPFA Treasury Management and Prudential Codes, and updated Government Investment Strategy and MRP guidance to Local Authorities (Government guidance pending), be noted.

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- (iii) General Fund Revenue
 - the Draft Revenue Budget 2018-2020 be approved, as attached at appendix A
 - the forecast levels of statutory and other Council reserves, as set out at appendix B, be noted
 - the strategy for the use of balances and reserves be approved (paragraph 3.73 refers)
 - a further reassessment of reserves requirements be undertaken at year end and reported to Members as part of the 2017-2018 financial outturn and rollover report (paragraph 3.74 refers)
 - the Council's continued participation on the Leeds City Region business rates pool for 2018-2019 be noted (paragraph 3.26 refers)
 - the Flexible Capital Receipts Strategy for 2018-2019 be approved (appendix D refers)
 - the Council Tax requirement for 2018-2019 be approved (appendix H refers)
 - the Council's Pay Policy Statement for 2018-2019 be approved (appendix I i-iv refers)
 - the Council's Statutory S151 Officer's positive assurance statement be noted (paragraphs 4.4.2 – 4.4.9 refer)
 - the Council's Statutory S151 Officer be given delegated authority to amend how the finally approved precepts are recorded in the Council's revenue budget in line with the final notifications received following decisions by the Office of Police and Crime Commissioner, the Fire and Rescue Authority and Parish Councils, should these be received after 14 February 2018 (paragraph 4.1.3 refers)

- (iv) Housing Revenue Account
 - the draft Housing Revenue Account Budget for 2018-2020 be approved (appendix A refers)
 - the strategy for the use of the Housing Revenue Account reserves, as set out at paragraphs 3.93 -3.94, be approved

KIRKLEES COUNCIL			
COUNCIL/CABINET/COMMITTEE MEETINGS ETC			
DECLARATION OF INTERESTS			
Name of Councillor			
Item in which you have an interest	Type of interest (eg a disclosable pecuniary interest or an "Other Interest")	Does the nature of the interest require you to withdraw from the meeting while the item in which you have an interest is under consideration? [Y/N]	Brief description of your interest

Signed: Dated:

NOTES

Disclosable Pecuniary Interests

If you have any of the following pecuniary interests, they are your disclosable pecuniary interests under the new national rules. Any reference to spouse or civil partner includes any person with whom you are living as husband or wife, or as if they were your civil partner.

Any employment, office, trade, profession or vocation carried on for profit or gain, which you, or your spouse or civil partner, undertakes.

Any payment or provision of any other financial benefit (other than from your council or authority) made or provided within the relevant period in respect of any expenses incurred by you in carrying out duties as a member, or towards your election expenses.

Any contract which is made between you, or your spouse or your civil partner (or a body in which you, or your spouse or your civil partner, has a beneficial interest) and your council or authority -

- under which goods or services are to be provided or works are to be executed; and
- which has not been fully discharged.

Any beneficial interest in land which you, or your spouse or your civil partner, have and which is within the area of your council or authority.

Any licence (alone or jointly with others) which you, or your spouse or your civil partner, holds to occupy land in the area of your council or authority for a month or longer.

Any tenancy where (to your knowledge) - the landlord is your council or authority; and the tenant is a body in which you, or your spouse or your civil partner, has a beneficial interest.

Any beneficial interest which you, or your spouse or your civil partner has in securities of a body where -

- (a) that body (to your knowledge) has a place of business or land in the area of your council or authority; and
- (b) either -

the total nominal value of the securities exceeds £25,000 or one hundredth of the total issued share capital of that body; or

if the share capital of that body is of more than one class, the total nominal value of the shares of any one class in which you, or your spouse or your civil partner, has a beneficial interest exceeds one hundredth of the total issued share capital of that class.



Name of meeting: Cabinet
Date: 6 March 2018
Title of report: Bereavement Services - Fees and Charges Review

Purpose of report To seek approval for the development of an updated business model and charging structure for Bereavement Services

Key Decision - Is it likely to result in spending or saving £250k or more, or to have a significant effect on two or more electoral wards?	Yes Significant effect on two or more electoral wards
Key Decision - Is it in the Council's Forward Plan (key decisions and private reports?)	Yes - Key Decision - September 2017
The Decision - Is it eligible for call in by Scrutiny?	Yes
Date signed off by Strategic <u>Director</u> & name Is it also signed off by the Service Director Finance, IT and Transactional Services? Is it also signed off by the Service Director Legal Governance and Commissioning?	Karl Battersby - 26.02.18 Debbie Hogg - 22.02.18 Julie Muscroft - 23.02.18
Cabinet member portfolio	Give name of Portfolio Holder Cllr S Pandor Cllr D Sheard

Electoral wards affected: All
Ward councillors consulted: None
Public or private: Public

1. Summary

- 1.1. This report seeks Cabinet approval to introduce an updated business model and charging structure for Bereavement Services which covers the next 5 year period.

2. Information required to take a decision

2.1 The current position

- 2.1.1 Bereavement Services provides a variety of burial and cremation services and memorial items across Kirklees. The service is provided in a caring and sensitive manner whilst ensuring that the needs of the communities and individuals it serves are met.
- 2.1.2 The Council has a statutory duty to ensure a funeral is provided for people who die with no-one to make funeral arrangements for them. Beyond this responsibility, Bereavement Services is a discretionary function for the Council and it can therefore set its own service-specific fees and charges.
- 2.1.3 Existing Bereavement Services fees and charges are reviewed annually, benchmarked with other local burial and cremation providers and are approved in line with the Council's Financial Procedure Rules. Current Bereavement Services fees and charges are published on the Council's website

<http://www.kirklees.gov.uk/beta/deaths-funerals-and-memorials/pdf/crematorium-fees-and-charges.pdf> and <http://www.kirklees.gov.uk/beta/deaths-funerals-and-memorials/pdf/cemetery-fees-and-charges.pdf>

- 2.1.4 Burials and interment of cremated remains are provided at 14 cemeteries across Kirklees. Cremations and interment of cremated remains are provided at 2 crematoria in Kirklees, located in Huddersfield (Fixby) and Dewsbury Moor. Memorial options are available at all cemeteries and crematoria.
- 2.1.5 Currently, the service provides approximately 500 burials, approximately 120 interments (burials) of cremated remains (ashes), and approximately 3,000 cremations each year.
- 2.1.6 Over recent years, private crematorium and cemetery operators have entered the market, modernising the delivery of what have been very traditional services, and changing customer perceptions and demands of a modern bereavement service. However, it is clear that private operators have targeted the more profitable cremations market, where competition is much more buoyant; leaving more costly burials either to niche operators (e.g. natural burial grounds), or the public sector.
- 2.1.7 The personalisation of funeral arrangements is also an emerging trend in the market, whereby customer demand for services at weekends and evenings is increasing. This is partly driven by more modern self-serve approaches to events such as weddings and funerals, where people are looking to take control and make more arrangements themselves and partly by cost.

2.2 The Engagement Process

- 2.2.1 On 19 September 2017, Cabinet considered an initial report for the development of future business models and charging structures for Bereavement Services.

<https://democracy.kirklees.gov.uk/ieListDocuments.aspx?Cid=139&Mid=5268>

The decisions made by Cabinet at that meeting were:-

- That the report be accepted in principle and the contents noted.
- That charges for the interment (burial) or cremation of a child or young person aged under 18 are ceased.
- That arrangements were made for an engagement exercise on the proposed changes to fees and charges. This would be undertaken with affected community groups prior to the submission of a further report to a future meeting of Cabinet meeting.
- That any members of the public who wished to be informed of the engagement exercise be asked to register their interest with their local Ward Councillor/s.

2.2.2 The Council established a two-stage public engagement process, to raise awareness of the financial challenges facing Bereavement Services and to invite suggestions on how the services could be provided in an affordable and more efficient way in future. Details of the engagement process were shared online using the Council's 'Involve' facility. Essentially this involved on-line feedback and then some face to face engagement sessions.

<https://www.kirklees.gov.uk/involve/entry.aspx?id=908>

2.2.3 An online engagement process using a dedicated email address (bereavement.engagement@kirklees.gov.uk) was created for the period Monday 30 October 2017 to Friday 8 December 2017. Invitations to participate were specifically extended to:-

- Burial committees.
- Funeral directors.
- Faith schools.
- Place of worship.
- Kirklees elected Councillors.
- Cultural or faith-based organisations.
- Stonemasons.
- Community organisations.
- MPs.

2.2.4 The invitation to participate was also more generally promoted on the Kirklees Council website, using social media and in the local press.

2.2.5 A summary of the outcome of the online engagement process is available to view online through 'Involve'.

<https://www.kirklees.gov.uk/involve/entry.aspx?id=908>

2.2.6 Three face to face engagement sessions were held in January 2018 at Batley, Dewsbury and Huddersfield Town Halls. Invitations were extended to those who had engaged through the online process, to enable more in-depth discussions of ideas and to enable future options to be explored.

2.2.7 Those attending represented local funeral directors, burial committees, faith groups and establishments as well as individuals with views and ideas to contribute. A summary of the outcome of the online engagement process is available to view online through 'Involve'.

<https://www.kirklees.gov.uk/involve/entry.aspx?id=908>

2.2.8 There was a consensus across all the sessions that:-

- Funeral costs were high for most people already.
- Some people struggled to afford the funeral of their choice.
- Faith and belief meant that cheaper options were not feasible for some and choice was limited by faith or belief.
- More transparency of information, particularly regarding bookings and service times for burials would be helpful.

2.3 The Proposed Business Model

2.3.1 Having regard to the feedback given during the engagement process, the proposed business model in this report, seeks to provide a sustainable and financially viable Bereavement service as well as satisfying the following criteria:-

- The Council meets statutory and legal requirements.
- The scope of our service offer seeks to meet wherever possible, the varied requirements of the bereaved.
- Services are delivered fairly and efficiently.
- The price our customers pay is comparable with other local and regional service providers.
- We offer (and charge) both affordable and premium service options to extend choice to our customers and respond to emerging market trends.
- We procure a partner to provide a Kirklees affordable funeral package.
- Kirklees Bereavement Services remain competitive in the region, within both the public and private sectors.
- Our pricing structure achieves the financial targets set within the Council's Medium Term Financial Plan (MTFP).

2.3.2 The proposal is to introduce a charging model which covers a 5 year period. The model has been developed over this period to ensure the following is achieved:-

- Strategic long term adjustments in pricing allow us to stabilise the market and retain our market share.
- Gradual increases in charges mean we can benchmark against other operators and maintain our competitiveness.
- Introducing new charges gradually allows us to test and respond to emerging trends and changing market demands.
- Kirklees residents can make funeral choices based on a transparent charging schedule which offers scope for personal, cultural and price preferences.

2.3.3 Equality Impact Assessments (EIAs) provide evidence of how we have considered the implications of the proposed changes to the Bereavement Services business model and charging structure on protected characteristic groups. The EIAs are in line with our duty to comply with the Public Sector Equality Duty (Equality Act 2010)

<http://www.kirklees.gov.uk/you-kmc/deliveringServices/impactAssessments/impactassessments.asp>

2.4 Key Principles of Operation

2.4.1 The provision of Bereavement Services is a non-statutory operation for the Council. Whilst a commercial model would seek to recover the costs of services chosen by and delivered for customers, the operating model being recommended takes into account the issues and concerns raised through the recent engagement process.

- 2.4.2 In this respect, our proposed model will be structured so that we seek to recover some costs of burials, and cremations will continue to make a surplus. This surplus will support, amongst other things, free services for under 18 year olds, the development of a Kirklees affordable funeral, and the replacement of equipment to ensure our services remain in demand and competitive in comparison to our competitors.
- 2.4.3 We will continue to manage and prioritise the availability of cemetery capacity for Kirklees residents by charging an additional premium to accept an out-of-area burial.

The term resident means, with regard to right of burial and interment fees:-

- A person who lives in Kirklees.
- A person, who, although living outside the borough when they died, used to be a resident in the Kirklees at the time when they or their next of kin bought the exclusive right of burial.
- Residents of the borough who moved directly from Kirklees in to a nursing home or hospital outside Kirklees before they died.

The service will require proof of residency before the burial takes place.

- 2.4.4 There will be no premium charges for burials (Kirklees residents).
- 2.4.5 There will still be premium charges for Saturday cremations.
- 2.4.6 There will be no 'out of standard hours' surcharges for burials.
- 2.4.7 Service times for burials will be standardised and the length of burial services will be limited to ensure the management of an efficient and transparent burials booking system. Longer service times could be requested by booking and paying for additional service time, subject to operational availability. In line with cremations, late/early arrival fees will also be charged.
- 2.4.8 'Direct' cremations, where there is no chapel service or attendees present, will remain the lowest cost cremation service.
- 2.4.9 On receiving a booking for a cremation service, we intend to perform the cremation within 72 hours of the service taking place, in line with fluctuating daily operating requirements.
- 2.4.10 The current operating model will be revised for both burials and cremations by September 2018. Specifically:-

Burials

- There will be burial provision available 7 days a week.
- There will be no charge for services for under 18 year olds.
- There will be a specified number of burial service times available each day (3 available in North Kirklees and 3 in South Kirklees – Monday to Friday – and 2 each on Saturday/Sunday).
- No additional capacity will be available outside these service time slots.
- There will be seasonal variations for burial service times, maximising the use of natural daylight.
- A diary (service bookings) management system will be developed to facilitate on-line bookings for funeral directors and burial committees.

Cremations

- Existing cremation service times will be adjusted to provide more cremation service times each working day, and the option of a premium Saturday service.

2.4.11 Bereavement Services will not charge for the burial (interment) or cremation of under 18 year olds.

Specifically this means:-

- No cremation fee to be levied for under 18 year olds.
- No interment fee to be levied for under 18 year olds – applicable to burials.
- Pre-term and still-born babies to be buried within a public grave – free of charge.
- All other under 18 year olds to be buried within a single private grave – free of charge.

All other services will be chargeable as per charges recommended in **Appendix 1**.

2.4.12 In order to ensure continued engagement going forward, the Council will commit to running a forum for continued dialogue. This forum will include stakeholders such as burial committees, faith representatives and funeral directors; it will meet 4 times per year, alternating venues between North and South Kirklees.

2.5 Impact of revised Service Delivery Model

The comprehensive list of proposed fees and charges are attached in **Appendix 1**.

2.5.1 Impacts include:-

- Fees and charges remain both comparative and competitive within the region, providing choice to local people and competitive options for local businesses including funeral directors.
- Fees and charges will be reviewed and adjusted on an annual basis.
- Non-residents will be charged more for a burial than residents of Kirklees
- Charges will be introduced for accompanied visits to select a grave.
- Burials will be available for all faiths and non-faiths 7 days a week.
- There will be specified capacity for the maximum number of burials that can be provided each day.
- Working patterns for existing employees may be affected to enable an alternative operating model to be commenced.

2.5.2 Potential risks associated with implementing the above charging proposal include:-

- Public satisfaction with burial services deteriorates as a result of introducing fee increases.
- A reduction in demand for burial services.
- The increase in fees and introduction of new charges will impact differently on different communities.
- There will be an impact on resources required to enable 7 day burial services to be provided.

2.5.3 The charges for burial will be increased in 18/19 taking into consideration the average charge across our West Yorkshire comparators. Our comparators have been chosen as they are statistically similar to ourselves.

The average below is based on a 4'6" earthen grave.

	<i>Month Fees Amended</i>	<i>Burial for 1 (at February 2018)</i>
Bradford	April	£1,753
Calderdale	Jan/Feb	£1,962
Wakefield	April	£2,084
WY Average (WY = West Yorkshire)		£1,933
Kirklees Current		£1,815

As at February 2018, the current WY average burial charge is £1,933. The table below uses the current WY average to set the Kirklees burial charge for 18/19. This increases the charge for a standard burial by £118. In subsequent years an inflation rate of 2% will be applied.

		18/19
Kirklees burial charges match the current WY average in 18/19 and then burial charges are assumed to increase 2% per annum from then onwards.	Burial Fee for 1	£1,933
	% Increase Per Year	6.5%
	Price Increase In Yr	+£118

2.6 Timescale

2.6.1 The revised charges would come into effect on 1 April 2018. An annual review of all Bereavement fees and charges would be completed by officers including benchmarking of regional process and market influences.

3 Implications for the Council

3.1 Early Intervention and Prevention (EIP)

By extending the availability and choice of services available to families at one of the most distressing times, at various price points, including affordable options, families are better able to cope, and less likely to need the support of additional Council services.

3.2 Economic Resilience (ER)

Working with a local company to procure a Council-approved affordable funeral option helps families to improve their own personal resilience.

Adopting a modern business model which is reflective of emerging trends as well as regional pricing, underpins a more transparent commercial operation for the Council, and will enable us to reinvest in the full scope of bereavement services provided.

3.3 Improving Outcomes for Children

None

3.4 Reducing demand of services

Demand for burials and cremation services is changing, with an increasing demand for affordable services as well as weekend options. Ensuring that our customers pay a charge which is regionally comparable, enables customers to choose regionally where to hold their funeral service.

Introducing a transparent and fair service, including burials at weekends, helps us to manage demands more visibly. And in instances where we are receiving requests for out-of-area burials, the levy of an additional premium in these circumstances helps us to retain land allocated for cemeteries in Kirklees, primarily for the use of Kirklees residents.

As funeral 'tourism' is not uncommon (where the only factor in determining where a cremation or burial takes place is the price), our new business model ensures that our prices remain competitive, but not at a rate which suddenly generates additional excess demand on services from non-Kirklees residents.

3.5 Other (e.g. Legal/Financial or Human Resources)

The Equality Act 2010 creates the Public Sector Equality Duty (PSED).

Under section 149 of the Act

- 1) A public authority must, in the exercise of its functions, have due regard to the need to -
 - a) Eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;
 - b) Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;
 - c) Foster good relations between persons who share a relevant protected characteristic and persons who do not share it.

The relevant protected characteristics are –

Age;
Disability;
Gender reassignment;
Pregnancy and maternity;
Race;
Religion or belief;
Sex;
Sexual orientation.

In order to fulfil the PSED the Council is required to assess the impact of any proposed changes to policies and/or creation of any new policies on the equality objectives set out above. The way in which the Council approaches this task is to conduct Equality Impact Assessments (EIA).

As indicated earlier in paragraph 2.3.3 the Council has carried out Equality Impact Assessments (EIAs) to help it take due regard of its public sector equality duties in relation to these proposals.

<http://www.kirklees.gov.uk/you-kmc/deliveringServices/impactAssessments/impactassessments.asp>

Based on assumed activity levels and the revised charging arrangements outlined in Appendix 1 of this report, it is anticipated that this will generate income, in line with the budget for 2018-19.

4 Consultees and their opinions

Public engagement, online and in face to face sessions, has enabled local people to have their say on both how Bereavement Services currently provides services as well as ideas for future service delivery.

A summary of the engagement process is available to view online through 'Involve'.

<https://www.kirklees.gov.uk/involve/entry.aspx?id=908>

<http://www.kirklees.gov.uk/you-kmc/deliveringServices/impactAssessments/impactassessments.asp>

5 Next steps

If approved by Cabinet, the revised fees and charges would be implemented from 1 April 2018. Funeral Directors and Burial Committees will then be notified in advance of the change in fees and charges. Revised fees and charges will be published on the Council's website.

6 Officer recommendations and reasons

Having considered the content of the report and Appendices and having regard to the outcomes of the engagement exercise as described as well as the Council's public sector equality duty

- 6.1 Cabinet are asked to approve the fees and charges as set out in **Appendix 1** of this report.
- 6.2 Cabinet are asked to endorse the key principles of operation as set out in section 2.4 of this report.
- 6.3 Cabinet are asked to note the operational changes as set out in paragraph 2.4.10 of this report.
- 6.4 Cabinet are asked to delegate to the relevant Service Director - Commercial, Regulatory & Operational Services, the authority to benchmark regionally and revise burial charges annually, as per paragraph 2.5.3.
- 6.5 Cabinet are asked to endorse the setting up of the forum for continued engagement with stakeholders as set out in paragraph 2.4.12.

7 Cabinet portfolio holder's recommendations

The portfolio holders note engagement with the community and welcome the feedback received which has helped shape this report to Cabinet.

8 Contact officer

Sarah Durdin, Operational Manager, Commercial, Regulatory and Operational Services
sarah.durdin@kirklees.gov.uk
(01484) 221000

9 Background Papers and History of Decisions

Cabinet Report - September 2017

<https://democracy.kirklees.gov.uk/ieListDocuments.aspx?Cid=139&Mid=5268>

Previous Equality Impact Assessment 2017-18

<http://www.kirklees.gov.uk/you-kmc/deliveringServices/impactAssessments/impactassessments.asp>

10 Service Director responsible

Joanne Bartholomew, Service Director - Commercial, Regulatory & Operational Services
joanne.bartholomew@kirklees.gov.uk
(01484) 221000

Proposed schedule of Bereavement Services Fees and Charges

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
CEMETERY CHARGES			
<u>PRIVATE GRAVES</u>			
Purchase of Burial Rights Earthen Grave & Burial Chamber (<i>notification of death required</i>)			
Grave for 1 interment (50 year lease)	N	£989	£989
Grave for 2 interments (50 year lease)	N	£989	£989
Grave for 3 interments (50 year lease)	N	£1,285	£1,285
Grave for 4 interments (50 year lease)	N	£1,540	£1,540
Non-Kirklees resident – purchase of burial rights (price quoted grave for 1) <i>Contact Bereavement Services for prices for 2+ interments</i>	N	£989	£989
Pre-Purchase of Burial Rights Earthen Grave & Burial Chamber – Limited Availability			
Grave for 1 interment (50 year lease)	N	£1,632	£1,665
Grave for 2 interments (50 year lease)	N	£1,632	£1,665
Grave for 3 interments (50 year lease)	N	£2,111	£2,153
Grave for 4 interments (50 year lease)	N	£2,601	£2,653
Non-Kirklees resident – purchase of burial rights (price quoted grave for 1) <i>Contact Bereavement Services for prices for 2+ interments</i>	N	£1,632	£1,665
Burial interment of a Body in a Private Grave (for grave which exclusive right of burial has been granted) (max. 45 minute service)			
Adult interment – excavating to 4'6" depth (grave for 1)	N	£826	£944

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
Adult interment – excavating to 6' depth (grave for 2)	N	£826	£1,219
Adult interment – excavating to 7'6" depth (grave for 3)	N	£826	£1,495
Adult interment – excavating to 9' depth (grave for 4)	N	£826	£1,770
Interment for under 18 year olds (single private grave)	N <i>no charge</i>		
Non-Kirklees resident - burial/interment (price quoted grave for 1) <i>Contact Bereavement Services for prices for 2+ interments</i>	N	£826	£944
Accompanied appointment to choose a grave	N	new charge	£67
Marking of a grave in a cemetery	N	new charge	£34
Grave test dig to confirm depth	N	new charge	£198
<u>Timber for Muslim Burials</u>			
Adult full set	N	£367	£374
Child full set	N	£129	£132
Adult half set	N	£184	£188
Child half set	N	£69	£70
Vaulting Traditional Earthen Graves - Limited Availability			
Single grave to 4'6" depth (where available)	N	£683	£697
Set of flags for vaulted grave where required	N	£61	£62
Pre-cast grave liner (where operationally practical)	N	New charge	£700
<u>Casket Burials</u>			
To be charged in addition to purchase of burial rights and interment fee for graves excavated wider than 28"	N	new charge	£158
<u>Non-Kirklees Resident Burial Surcharge</u>	N	new charge	£605

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
To be charged in addition to purchase of burial rights and interment fee if the deceased has not been a resident of the Kirklees district.			
Pre-booked additional service time (for burials / interments longer than 45 mins duration - max. 90 minutes)	N	new charge	£91
Burial / interment service beyond pre-booked service time (early arrival or service overrun)	N	new charge	£183
<u>PUBLIC GRAVES</u>			
Burial of a Body in a Public Grave			
Adult interment	N	£826	£944
Interments for under 18 years	N <i>no charge</i>		
Interment of Cremated Remains in Private Earthen Grave			
Interment 2' deep (<i>soil permitting</i>)	N	£194	£198
Interment in grave full depth (up to 6') (<i>if full burial/s to take place after cremated remains interment</i>)	N	£449	£458
Scattering of Cremated Remains in Cemetery			
Scattering (<i>by appointment only</i>)	N	£66	£67
<u>EXHUMATION</u>			
Cremated remains from grave 2' depth or Cremation Plot	N	£326	£333
Cremated remains from grave over 2' depth	N	£638	£651
Full Burial from grave plot	N	£1,632	£1,665
Full Burial (infant)	N	£821	£837
<u>GARDEN OF REST FOR CREMATED REMAINS</u>			
Purchase of earthen cremation plot (<i>notice of death required</i>) (<i>50 year lease</i>)	N	£342	£349

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1 18/19
Pre-purchase of earthen cremation plot (<i>50 year lease</i>)	N	£561	£572
Interment of cremated remains	N	£194	£198
Single memorial stone	Y	£140	£143
Single memorial stone with vase	Y	£199	£203
New or replacement plaque for above	Y	£56	£57
Desktop permit (<i>Garden of Rest</i>)	N	£54	£55
<u>CEMETERY MEMORIALS</u>			
Headstone permit on private graves prior to April 2000	N	£138	£141
Headstone permit between 01/04/2000 & 31/03/2005	no charge	£0	£0
Headstone permit from April 2005	N	£138	£141
Kerbstone Permit	N	£138	£141
Headstone and Kerbstone Permit combined	N	£240	£245
Additional inscription	N	£47	£48
Replacement / Re-fix	N	£47	£48
Infant memorial plaque	Y	£56	£57
Desktop permit (<i>Private Grave</i>)	N	£138	£141
<u>BURIAL CHAMBER MEMORIALS</u>			
Classic 900 (<i>Inc. 4 lines of inscription</i>)	Y	£1,300	£1,326
Heritage Classic Royale (<i>Inc. 4 lines of inscription</i>)	Y	£908	£926
<u>MEMORIAL BENCH</u>			
Bench with inscribed memorial plaque (<i>10 year lease</i>)	Y	£689	£703
Renewal of a memorial bench (<i>10 year lease</i>)	Y	£689	£703
Additional bench plaque	Y	£78	£80
<u>SANCTUM</u> (<i>above ground interment of cremated remains</i>)			
Sanctum 2000 (<i>20 year lease</i>)		£1,071	£1,092
Extension of further 10 years (<i>at lease expiry</i>)	Y	£403	£411
Extension of further 20 years (<i>at lease expiry</i>)	Y	£760	£775

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1 18/19
<i>(Includes Sanctum, 2 Interments, Faceplate and Inscription - 80 characters)</i>			
Additional Photo / Motif	Y	from £89	from £91
Pre purchase cemetery sanctum 2000 (20 year lease)	Y	£1,071	£1,092
2 nd Interment of Cremated Remains (if sanctum purchased prior to Oct 2012)	N	£66	£67
Added inscription for 2 nd Interment	Y	from £90	from £92
Octagonal Sanctum (20 year lease)	Y	£765	£780
Extension of further 10 years (at lease expiry)	Y	£398	£406
Extension of further 20 years (at lease expiry)	Y	£536	£547
<i>(Includes Sanctum, 1st Interment, Faceplate and Inscription - 80 characters)</i>	Y		
Subsequent interment of cremated remains (octagonal sanctum)	N	£66	£67
Pre-Purchase Octagonal Sanctum (20 year lease)	Y	£765	£780
<i>(Includes Sanctum, Faceplate and Inscription - 80 characters)</i>			
Extra characters (80+) (per character)	Y	£2	£2
Sanctum 2 Garden of Rest			
Sanctum 2 Garden of Rest (50 year lease)	Y	£312	£318
Sanctum 2 photos/motif	Y	£89	£91
<u>OTHER CHARGES</u>			
Genealogical (manual) search of Burial registers (max.3 names)	N	£36	£37
Late cancellation of Service / Funeral appointment (applicable to burials and cremations) (less than 48 working hours prior to service time)	N	£138	£141
Charges for late paperwork (applicable for burial and	N	£27	£28

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1 18/19
cremation services) (i.e. less than 48 working hours prior to Service time)			
Batley Cemetery Chapel Hire	Y	£71	£72
Cremated remains wooden casket incl. Name plaque (price from)	Y	£61	£62
Grave Planting - planting of bedding plants twice a year			
1 year (per grave)	Y	£97	£99
10 years (per grave)	Y	£709	£723
<u>CREMATORIA CHARGES</u>			
<u>CREMATION SERVICES – Monday to Friday</u>			
<i>(Includes Cremated remains container,, Cremation Certificate, Use of Organ &/or Music System, Medical Referee fees, environmental levy & Scattering of Cremated Remains Appointment-where applicable)</i>			
Direct Cremation (no service/no attendees/prior to 9am/limited availability)	N	£551	£562
Adult – (age 18 years and above) – 30 mins Service (9am –9.30am - 10am only)	N	£617	£629
Adult – (age 18 years and above) – all other Services (45 min service only)	N	£699	£713
Young person - (age under 18 years)	N no charge		
Body Part (non-Kirklees Cremation)	N	£66	£67
Body Part (Kirklees Cremation)	no charge		
Out of Hours & Weekend Cremation Services (subject to availability)	N	£1,347	£1,374
<u>OTHER CHARGES – exceptions apply</u>			

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
Pre-booking of Chapel for Double Service time (<i>add to 9am and 9.30am</i>)	N	£76	£78
Pre-booking of Chapel for Double Service time (<i>add to Services from 10am</i>)	N	£153	£156
Web streaming of live funeral	Y	New charge	£35
Web Streaming of live funeral service & 28 days to 'watch again'	Y	£61	£62
DVD / Blue Ray / USB stick - copy of Funeral Service	Y	£40	£50
Additional DVD copy of a Funeral Service	Y	£36	£37
DVD / Blue Ray / USB stick copy of Funeral Service & Tribute	Y	£45	£50
DVD copy of Visual Tribute	Y	£25	£26
CD copy of Funeral Service	Y	£43	£44
Use of Chapel Presentation Screen – Single photograph display	Y	£12	£12
Use of Chapel Presentation Screen- Simple Slideshow	Y	£40	£41
Use of Chapel Presentation Screen- Professional photo tribute	Y	£70	£71
Use of Chapel Presentation Screen- Family supplied video checking	Y	£15	£15
Additional 25 photos on a visual tribute	Y	New charge	£20
Pre-booking of coffin bearer (48 hours prior to service)	N	£15	£15
Same Day Booking / use of coffin bearer (day of funeral)	N	£20	£20
Hire of Chapel for Private Memorial Service (max 45 mins)	Y	£275	£281
Hire of Chapel of Rest per hour (Huddersfield Crematorium only)	Y	£25	£26
Unauthorised use of Chapel time (<i>Services exceeding allocated time</i>)	N	£179	£183
Late cancellation of Service/Funeral appointment (<i>i.e. less than 48 working hours prior to Service</i>)	N	£138	£281

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
Charges for late paperwork from Funeral Director (<i>i.e. less than 48 working hours prior to Service</i>)	N	£27	£28
Genealogical Search of Cremation Registers (<i>max 10 names - data protection applies</i>)	N	£36	£37
<u>CREMATED REMAINS</u>			
Replacement/Additional cremated remains certificate	N	£20	£20
Postage of cremated remains in Great Britain	N	£102	£104
Temporary Storage of cremated remains after 1 month (<i>per month</i>)	N	£46	£47
Scattering of cremated remains - Kirklees cremation (<i>appointments within standard office hours Mon-Fri</i>)	<i>no charge</i>		
Scattering of cremated remains - None Kirklees cremation (<i>appointments Mon-Fri</i>)	N	£66	£67
Scattering of cremated remains— <i>Weekends (subject to availability)</i>	N	£128	£131
Decorative scattering tubes/cremation urns (price from)	Y	£30	£31
<u>CREMATORIA MEMORIALS</u>			
(<i>within the Crematoria Gardens of Remembrance</i>)			
Memorial Stones			
Memorial Plaque (on a shared block of 5 Stones) (<i>10 year lease - Huddersfield only</i>)	Y	£235	£240
Yorkshire Stone Inc. Flower Vase & Inscribed Plaque (<i>10 year lease - Huddersfield only</i>)	Y	£388	£396
Yorkshire Stone Inc. Flower Vase & Inscribed Plaque (<i>12 month lease - Huddersfield only</i>)	Y	£50	£51
Standard kerb stone with memorial plaque (<i>5 year lease</i>)	Y	£199	£203

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
Standard kerb stone with memorial plaque (10 year lease)	Y	£281	£287
Standard kerb stone with memorial plaque (12 month lease)	Y	£45	£46
Changed or Replacement plaque for all memorial stones (for remainder of lease term)	Y	£51	£52
Memorial Stones – renewals (includes new plaque if required)			
Memorial Plaque (on a shared section of 5 Stones) (10 year lease -Huddersfield only)	Y	£153	£156
Yorkshire Stone Inc. Flower Vase & Inscribed Plaque (10 year lease) –Huddersfield only)	Y	£204	£208
Standard kerb plaque (renewal -5 year lease)	Y	£122	£124
Standard kerb plaque (renewal -10 year lease)	Y	£168	£171
Granite Vase Block			
Granite Vase Block - personalised with memorial inscription (5 year lease)	Y	£316	£322
Granite Vase Block - personalised with memorial inscription (10 year lease)	Y	£423	£431
Changes/replacement inscription tablet (for remainder of lease term)	Y	£179	£183
Granite Vase Block Emblems/Photographs (price from)	Y	£80	£82
Granite Vase Block Renewal			
Granite Vase Block - no changes (5 year lease)	Y	£163	£166
Granite Vase Block - no changes (10 year lease)	Y	£235	£240
Garden block with granite tablet – 10 year lease	Y	New charge	£425
Garden block with granite tablet – 5 year lease	Y	New charge	£320
Garden block – changes / replacement inscription (for remainder of lease term)	Y	New charge	£180

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
Garden block – no changes to inscription (10 year renewal of lease)	Y	New charge	£235
Garden block – no changes to inscription (5 year renewal of lease)	Y	New charge	£165
Ornamental Bird Bath (<i>set in woodland area with dedicated plaques around the pedestal</i>) (<i>Huddersfield crematorium only</i>)			
Small plaque (7 ¼") <i>personalised with your own memorial inscription – (5 year lease)</i>	Y	£184	£188
Medium plaque (8 ¾") <i>personalised with your own memorial inscription – (5 year lease)</i>	Y	£194	£198
Large plaque (10 ½") <i>personalised with your own memorial inscription – (5 year lease)</i>	Y	£204	£208
Outdoor Memorial Book (<i>Granite Ornamental Book – with individual inscribed plaques</i>) (<i>Huddersfield Crematorium only</i>)			
Memorial Inscribed plaque (<i>10 year lease</i>)	Y	£158	£161
Renewal of plaque (no changes) (<i>10 year lease</i>)	Y	£117	£119
Replacement plaque for the remainder of lease years	Y	£71	£72
Memorial Bench			
Bench with Inscribed Memorial Plaque (<i>10 year lease</i>)	Y	£689	£703
Additional bench plaque	Y	£78	£80
Memorial Bench Renewal			
Renewal of memorial seat - 10 year (within Crematoria Gardens)	Y	£689	£703
Memorial Plaque –Timber Post - (<i>5 year lease</i>) (<i>Dewsbury Moor Crematoria only</i>)	Y	£79	£81

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1
			18/19
Circular Tree Seat (shared) including plaque (5 year lease)	Y	£79	£81
Bird Box Memorial (set within a woodland setting – guaranteed 2 years) without personalised memorial inscription plaque	Y	£61	£62
Bird Box Memorial (set within a woodland setting – guaranteed 2 years) with a personalised memorial inscription plaque	Y	£76	£78
Plastic memorial vases (with ground spike to be used by your memorial)			
(Please note we do not allow glass/pottery vases in the grounds for health & safety reasons)	Y	£5	£5
Memorial Trees			
Memorial tree with plaque (Inc. 1 plaque) (5 year lease)	Y	£372	£379
Memorial tree with plaque (Inc. 1 plaque) (10 year lease)	Y	£653	£666
Memorial tree with plaque (Inc. 2 plaques) (5 year lease)	Y	£495	£505
Memorial tree with plaque (Inc. 2 plaques) (10 year lease)	Y	£780	£796
Replacement plaque (per plaque) for above	Y	£117	£119
Memorial Trees - Renewals			
Memorial tree with plaque (5 year lease)	Y	£184	£188
Memorial tree with plaque (10 year lease)	Y	£306	£312
Memorial tree with plaque (Inc. 2 plaques) (5 year lease)	Y	£301	£307
Memorial tree with plaque (Inc. 2 plaques) (10 year lease)	Y	£423	£431
Memorial Standard Rose Trees			
Standard rose tree – Inc. plaque (5 year lease) subject to availability	Y	£270	£275
Standard rose tree – Inc. plaque (10 year lease) subject to availability	Y	£347	£354
Replacement plaque for Standard Rose Tree	Y	£66	£67

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1 18/19
Memorial Standard Rose Trees - renewals			
Standard rose tree – Inc. plaque (<i>5 year lease</i>)	Y	£184	£188
Standard rose tree – Inc. plaque (<i>10 year lease</i>)	Y	£224	£228
Memorial Rose Bush			
Rose bush with plaque (<i>5 year lease</i>)	Y	£163	£166
Rose bush with plaque (<i>10 year lease</i>)	Y	£219	£223
Rose bush with plaque (<i>12 month lease</i>)	Y	£40	£41
Replacement plaque for above	Y	£66	£67
Memorial Rose Bush - renewals			
Rose bush with plaque (<i>5 year lease</i>)	Y	£92	£94
Rose bush with plaque (<i>10 year lease</i>)	Y	£122	£124
Sanctum (Includes 2 interments) (<i>above ground interment of cremated remains</i>)			
Sanctum 2000 (<i>20 year lease/lease</i>)	Y	£1,071	£1,092
Extension of further 10 years (<i>at lease expiry</i>)	Y	£403	£411
Extension of further 20 years (<i>at lease expiry</i>)	Y	£760	£775
2 nd interment (Sanctum purchased prior to Oct 2012)	N	£66	£67
Extra characters for inscription (<i>per letter</i>)	Y	£2	£2
Additional Photograph / Motif (price from)	Y	£89	£91
<u>CREMATORIA MEMORIALS</u>			
<i>(Within the Chapel of Remembrance)</i>			
Book of Remembrance memorial inscription			
2 lines of inscription	Y	£87	£89
5 lines of inscription	Y	£184	£188
8 lines of inscription	Y	£245	£250
Additional Crest, badge, floral emblem, shield or coat of arms (price from)	Y	£41	£42

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1 18/19
<i>(Only available with 5 and 8 line entries)</i>			
Miniature Book of Remembrance			
Exact copy of a 2 line entry	Y	£87	£89
Exact copy of a 5 line entry	Y	£102	£104
Exact copy of an 8 line entry	Y	£112	£114
Additional Crest, badge, floral emblem, shield or coat of arms (price from)	Y	£41	£42
<i>(Only available with 5 and 8 line entries)</i>			
Folded Remembrance Card			
Exact copy of a 2 line entry	Y	£56	£57
Exact copy of a 5 line entry	Y	£71	£72
Exact copy of an 8 line entry	Y	£87	£89
Additional Crest, badge, floral emblem, shield or coat of arms (price from)	Y	£41	£42
<i>(Only available with 5 and 8 line entries)</i>			
Memorial Wall - An inscribed solid Arboria wood plaque <i>(Personalised with a memorial inscription)</i>			
Plaque with text only <i>(10 year lease)</i>	Y	£265	£270
Plaque with text with engraved motif <i>(10 year lease)</i>	Y	£296	£302
Plaque with text with engraved and hand painted motif <i>(colour) (10 year lease)</i>	Y	£367	£374
Plaque with text with ceramic portrait <i>(10 year lease)</i>	Y	£398	£406
Memorial Wall - Arboria Plaque (renewals)			
Plaque <i>(no changes) (5yr lease)</i>	Y	£117	£119
Plaque <i>(no changes) (10 year lease)</i>	Y	£209	£213
Plaque with changes or additional items (price from)	Y	£200	£204
Ornate Wall Mounted Memorial Tree			

Fees and Charges for Bereavement Services	VAT Y/N	Current charge	Year 1 18/19
Cost per Inscribed leaf <i>(personalised with a memorial inscription) (5 year lease)</i>	Y	£92	£94



Name of meeting: CABINET
Date: TUESDAY 6 MARCH 2018
Title of report: EXTRA CARE HOUSING – RESTAURANT FACILITY

Purpose of report:

To seek approval to introduce a service charge to contribute towards the cost of providing the restaurant service at the schemes.

Key Decision - Is it likely to result in spending or saving £250k or more, or to have a significant effect on two or more electoral wards?	No
Key Decision - Is it in the Council's Forward Plan (key decisions and private reports?)	
The Decision - Is it eligible for call in by Scrutiny?	Yes
Date signed off by <u>Strategic Director</u> & name	Richard Parry 9 February 2018
Is it also signed off by the Service Director for Finance IT and Transactional Services?	Debbie Hogg – 13 February 2018
Is it also signed off by the Service Director for Legal Governance and Commissioning Support?	Julie Muscroft – 13 February 2018
Cabinet member portfolio	Cllr Scott, Adults and Public Health

Electoral wards affected:

All; whilst the extra care housing schemes are located at Dewsbury West, Crosland Moor and Netherton and Heckmondwike the current, and future, tenants do not have to have been resident in the wards where they are located.

Ward councillors consulted:

None as the residents come from all over Kirklees

Public or private:

Public

1. **Summary**

- 1.1 Monitoring of the services offered at the Council's three extra care housing schemes has identified issues with the current model that are limiting its effectiveness.
- 1.2 Current usage of the restaurants at the schemes, together with increasing costs, is affecting their viability.
- 1.3 This report sets out proposals that will introduce a new service charge for ongoing provision of an onsite restaurant service; an element of which will be eligible for housing benefit. Tenants will receive a number of meals for the charge.

2. **Information required to take a decision**

Background

- 2.1 The Council has three extra care housing schemes which were opened between June 2013 and June 2014:
 - Woodland Court, Dewsbury, providing 46 one and two bedroom flats.
 - Meadow Green, Heckmondwike, providing 43 one and two bedroom flats and 10 flats in Meadow Green Lodge for people who have dementia.
 - Sandy Mount, Crosland Moor, providing 41 one and two bedroom flats.
- 2.2 The schemes were built under a Housing Revenue Account (HRA) Private Finance Initiative (PFI) contract with the ongoing tenancy and facilities management services being provided by the PFI contractor.

Current Care and Support Model

- 2.3 Initial modelling for the provision of care and support was based on the aim of creating a 'balanced community' across three levels of care needs:
 - 20% low/moderate needs (approximately 0-4 hours support per week)
 - 40% substantial needs (approximately 4-10 hours support per week)
 - 40% critical needs (approximately 10-40 hours support per week)

Restaurant Facilities

- 2.4 As is common with extra care housing schemes all three have restaurant facilities which are currently delivered under a three year contract, from 2017, with the Kirklees Catering Service to offer a quality hot two-course meal every day plus other menu options at affordable prices to tenants and the local community. This arrangement will be reviewed in 2019.
- 2.5 Currently tenants and other customers are able to use the restaurants as and when they want on a "pay as you go" basis. Current usage is not sufficient leading to uncertainty of income which is affecting their viability. There is a budgeted provision to subsidise the service; however actual subsidy levels have exceeded budget, requiring further financial support from the HRA. This means less money is available to maintain the council's housing stock.
- 2.6 Officers work closely with the Kirklees Catering Service to improve sales, reduce costs and increase repeat customers. Examples of activities include holding themed events, working with local community groups, marketing extra care room hire with a catered offer. One scheme currently provides facilities and catering to two day services for older people living in the community.

2.7 Officers have begun working with Community Plus teams to promote the use of the restaurant and communal facilities to support local residents who have low level needs relating to social isolation and meals. Whilst this may enhance the viability of the restaurant facility it is necessary to secure ongoing funding to provide a guaranteed service as part of the Extra Care Housing offer.

2.8 Officers have considered three main options for the future of the restaurant services:

(a) **Do nothing** – i.e. retain the current service and charging model. Whilst efforts would continue to maximise sales; it is unlikely that the additional income generated would significantly reduce the actual amount of subsidy required. The additional income could not be guaranteed for the service provider.

(b) **Close the restaurants** – whilst this would negate the need for further financial subsidy, there is a risk that additional demand for support from tenants to have a meal prepared is experienced. New tenants, in particular those with higher needs, may not be attracted to extra care housing without a restaurant facility. There is considerable negative impact in losing this service as a tenant and community facility as restaurants are seen as integral to extra care housing and use of the communal areas in the schemes. Potential future opportunities to support communities through Community Plus would be lost.

(c) **Change the charging structure** – see 2.10 below.

2.9 Officers have asked tenants for their views on a number of different aspects of the restaurant facilities. The responses are summarised in Appendix 1.

2.10 Following consultation with tenants and research into various restaurant operating models in extra care schemes, a proposal is being made to implement a fixed service charge to support the cost of providing the service. The charge will be implemented by issuing a notice of variation to current tenants in accordance with section 103 of the Housing Act 1985.

A charge of £13.15 (at 2017/18 prices) per week per flat is being proposed which would provide three, two-course meals per flat per week without further charge. In setting the charge to cover three meals per week a good balance is achieved between affordability and retaining independence.

It is anticipated that a proportion of the charge (approximately £7.80 at 2017/18 prices) could be eligible for housing benefit for those tenants who claim housing benefit. The cost of providing the provision of meals is broken down into two elements; the cost of the food (which is ineligible for housing benefits) and the non-meal cost of providing the service which can be met through the service charge and be eligible for Housing Benefit.

What will be New and Different?

2.11 Tenants will be able to access three meals per flat per week from the restaurant covered by the service charge and still retain choice over their use of the facilities at other times.

2.12 The introduction of the service charge will ensure that future allocations will target those tenants who have care needs and are those most able to benefit from the full extra care housing offer. This will both ensure the ongoing viability of the schemes and support the reduction of care home placements that are generally more costly to the Council.

3. Implications for the Council

3.1 Early Intervention and Prevention (EIP)

There is no data within the Council evidencing the benefits of extra care housing in relation to EIP. However, wider research published by the Housing Learning and Improvement Network states:

'Using research based on interviews with residents, the study found that overall they reported improved outcomes in relation to their health, happiness, confidence, social life, relationships with their families and general well-being.' [here](#).

Also the publication "The Value of Sheltered Housing" commissioned by the National Housing Federation states:

'Those in extra care housing are less likely to enter institutional accommodation compared to those living in the community in receipt of domiciliary care. Unplanned hospital admissions reduce from 8-14 days to 1-2 days. Over a 12 month period total NHS costs (including GP visits, practice and district nurse visits and hospital appointments and admissions) reduce by 38% for extra care residents. Routine GP appointments for extra care residents fell by 46% after a year. Falls rates in extra care housing measured at 31% compared to 49% in general housing.' [here](#).

The Council commissioned a report by Peter Fletcher Associates Consultancy which confirmed the benefits of extra care housing as above.

Additionally, living in extra care decreases the need for people to attend day services; loneliness and isolation are reduced, tenants are engaged in meaningful activity and carer stress is also reduced.

3.2 Economic Resilience (ER)

The extra care housing schemes provide local employment opportunities, including catering staff, care/support workers, cleaners. Monitoring of staffing profiles at the schemes indicates that a good proportion of the scheme based staff live locally to a scheme.

3.3 Improving Outcomes for Children

No impact.

3.4 Reducing demand of services

Using the restaurant service provides an alternative to the care provider preparing a meal in the tenant's flat as part of their planned care.

3.5 Other (eg Legal/Financial or Human Resources)

The income from the new restaurant service charge will be in the region of £95k per year and this will be paid to the HRA which covers the current level of actual subsidy of running the restaurants; which is approximately £140k per year. However as some tenant income is already received by the restaurants; the actual net benefit to the HRA will be lower.

The service charge will be added to the current rent and service charge for an extra care property. Advice from Legal Services has been received confirming that as the restaurant service is already being provided and the charge is to cover the cost of providing this service, it is not necessary to formally consult with the current tenants before applying the charge. Current tenants will, however, be issued with a notice of variation to their tenancy with a notice period of not less than 3 months of the implementation date.

Public Sector Equality Duty – Public sector authorities are bound by the Public Sector Equality Duty set out in section 149 of the Equality Act 2010. This requires the Council to have regard to the effect of the proposed development of any differential impacts on groups with protected characteristics. The protected characteristics being race, disability, and gender and also covers sexual orientation, age, religion or belief, marriage and civil partnership, pregnancy and maternity and gender reassignment. A stage 1 Equality Impact Assessment (Screening Tool) has been completed to assess the likely impact on equality groups. This indicated that a stage 2 (Further Assessment and Action Plan) was required. An action plan has been prepared with the key aim of supporting tenants to prepare for the change, including work with Customer and Exchequer services and Kirklees Catering Services.

Here is the [link](#) to the Index of Equality Impact Assessments for 2018/19. Select the Adults & Health tab and the Stage 1 and Stage 2 assessments are located under the Housing heading.

4. Consultees and their opinions

- 4.1 Officers consulted tenants about their views on introducing a regular weekly charge for using the restaurant service and the majority of tenants did not object to this proposal in principle – see Appendix 1.

5. Next steps

- 5.1 The service charge for the restaurants will come into effect within the 2018-19 financial year.

6. Officer recommendations and reasons

- 6.1 That approval is given to the option to implement a service charge for the restaurant facility as set out at 2.10 of the report to improve the viability of the contract and reduce the current level of subsidy required from the HRA.

7. Cabinet portfolio holder's recommendations

- 7.1
- That the service charge as set out at 2.10 is implemented and the impact monitored.
 - That Community Plus and other approaches are used to maximise use of the restaurants by the wider community.
 - That alternative delivery options are developed and evaluated in light of the above.

8. Contact officers

Sue Dunn, Client Manager, Housing PFI, 01484 221000

Emma Hanley, Senior Contracting and Procurement Manager, Commissioning, Public Health and Adult Social Care, 01484 221000

9. Background Papers and History of Decisions

- 9.1 None.

10. **Service Directors responsible**

Amanda Evans, Service Director, Adult Social Care Operations

Paul Kemp, Service Director, Economy, Regeneration and Culture

Appendix 1 - Extra Care Restaurant User Survey Results - August 2016

	Total	% total responses of 140 units
Number of Returns	53	38%
Do you use the restaurant?		
Yes	48	34%
No	5	4%
How many times a week?		
Up to three times	34	24%
More than three times	16	11%
Do you have a preferred day to eat in the restaurant?		
Preferred day stated	58	41%
No Preference	5	4%
Everyday	15	11%
What influences the day/days you use the restaurant?		
Menu choice	22	16%
Fits with activities	15	11%
Other - please state	7	5%
Social	3	2%
No Influence ticked	6	4%
If the kitchen were to close one day per week, which would you prefer?		
Day stated	18	13%
Would prefer no closures	30	21%
No Answer	4	3%
Do you think there is sufficient choice on the menu?		
Yes	34	24%
No	16	11%
Do you think prices are?		
Cheap	1	1%
Reasonable	40	29%
Expensive	11	8%
Do you use the restaurant on Bank Holidays?		
Yes	37	26%
No	17	12%
No Answer	2	1%
Introducing a restricted menu of soup, sandwiches and cold desserts for Bank Holidays - would you continue to use the restaurant?		
Yes	22	16%
No	10	7%
No Answer	11	8%
If you have meal preparation as part of your care package; do you agree that you are either supported to use the restaurant or have a meal supplied to your flat from the restaurant, rather than staff making a meal in your flat?		

Yes	11	8%
No	5	4%
No care package	16	11%
No answer	20	14%
An alternative to consider is providing a 2 course meal for every resident each day. Would you be prepared to have a hot; 2 course lunch included in your service charge?		
Yes	4	3%
No	18	13%
Dependant on how much	17	12%