Civic Centre, Riverside, Stafford

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Dear Members

Cabinet

A meeting of the Cabinet will be held on **Thursday 17 September 2026** at **6.30pm** in the **Craddock Room, Civic Centre, Riverside, Stafford** to deal with the business as set out on the agenda.

Please note that this meeting will be recorded.

Members are reminded that contact officers are shown at the top of each report and members are welcome to raise questions etc in advance of the meeting with the appropriate officer.

I. Curran

Head of Law and Governance

CABINET - 17 SEPTEMBER 2026

Chair - Councillor A T A Godfrey

AGENDA

1 Minutes of 14 July 2026 as circulated and published on 15 July 2026

2 Apologies

3 Councillors' Question Time (if any)

4 Proposals of the Cabinet Members (as follows):-

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(a)	**RESOURCES PORTFOLIO**		
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	(ii)	Updated Strategic Risk Register	40 - 57
	(iii)	Quarter 1 Performance Report 2026/27	58 - 85
	(iv)	Revenues and Benefits Collection report - Quarter 1 **PART CONFIDENTIAL**	86 - 92
		Report contains information relating to an individual, which is likely to reveal the identity of an individual and information relating to the financial or business affairs of any particular person (including the Council).	
(b)	**COMMUNITY PORTFOLIO**		
	(i)	Permission to Spend Local Authority Housing Fund 4	93 - 99
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		Report contains information relating to the financial or business affairs of any particular person (including the Council).	

Membership

Chair - Councillor A T A Godfrey

A T A Godfrey	-	Leader
R Kenney	-	Deputy Leader (Town Centres Regeneration Portfolio)
R P Cooke	-	Resources Portfolio
I D Fordham	-	Environment Portfolio
J Hood	-	Community Portfolio
G P K Pardesi	-	Leisure Portfolio
A N Pearce	-	Climate Action and Nature Recovery Portfolio
A F Reid	-	Economic Development and Planning Portfolio

Agenda Item 4(a)i

Final Accounts 2025-26

Committee: Cabinet

Date of Meeting: 17 September 2026

Report of: S151 Officer and Deputy Chief Executive (Resources)

Portfolio: Resources Portfolio

1 Purpose of Report

1.1 To present to the Cabinet the final outturn position for 2025/26.

2 Recommendations

2.1 That the final outturn position for the year ending 31 March 2026 be noted.

2.2 That the financing of the capital programme as outlined in the report be approved.

2.3 That the schemes detailed in **APPENDIX 3** be approved as detailed.

Reasons for Recommendations

2.4 The Budget report set out an indicative capital programme and financing, this report now sets out the actual capital spend and therefore financing to be approved.

3 Key Issues

3.1 The Budget for 2025/26 was revised as part of the Budget report to Council on the 10 February 2026 which set out a forecast transfer to working balances of £0.460 million pounds.

3.2 The Portfolio outturn for 2025/26 shows a favourable outturn of £0.309 million under budget, consisting of several variances which are detailed in the report.

3.3 Investment income in year has increased by £0.379 million as compared to the Revised Budget. This change has occurred due to the following factors:

- Interest rates remained higher for longer than anticipated giving a gross investment income of £0.529 million over budget.

- The budget also assumed an amount in relation to interest on balances held by the authority in relation to repayable grants, due to the fall in inflation and spend the final balance was an increase of £0.157 million, this included a backdated contribution to SAC balances held.

3.4 Technical items show a variance of £0.050 million reflecting contributions made to reserves.

3.5 The final contribution to working balances was £1.613 million a £1.153 million increase against the budgeted value. This was principally due to additional net investment income, one off additional grants from government and reduced portfolio expenditure.

3.6 Income from the Business Rates Retention Scheme was £0.013 million lower than anticipated.

4 Relationship to Corporate Priorities

4.1 The final outturn for 2025/26 covers all of the Council's priorities.

5 Report Detail

5.1 This report provides an analysis of the final accounts position for 2025/26. It covers the following accounts: -

- General Fund Revenue account - which bears the net cost of providing day-to-day services.
- Business Rates Retention
- Capital expenditure and how it is financed.
- Collection Fund.

5.2 Whilst the accounts are still subject to Audit, no changes to the below figures are anticipated that would impact upon Council Taxpayers due to the technical nature of the audit process.

5.3 This report was prepared at a very challenging time for the council. Resource constraints are making it ever more challenging to deliver functions whilst pressures and demands continue to increase. A prime example of this is local government reorganisation which is taking more capacity from support services which were already struggling to deliver existing council business. This will be kept under review and reported on, but it is likely that functions/projects will have to be reduced as a consequence.

General Fund Revenue Outturn

5.4 The table overleaf summarises the outturn position of the General Fund Revenue Account for the year compared with the budget position.

5.5 The Council's Net Expenditure (Portfolio Budgets) in relation to the Revenue Budget for 2025/26 financial year was set by the Council in February 2025 with a budget requirement of **£18.347 million.** In determining the 2026/27 Budget in February 2026 Council approved the Forecast Outturn for 2025/26 of **£18.040 million**, reduction of £0.307 million as compared to the Original Budget. The Revised Budget reflected the inflationary increases in costs and known changes in the forecast.: -

	Stafford Preliminary Outturn 2025/2026				
			Revised Budget	**Actual**	**Variance to Revised**
			£'000	**£'000**	**£'000**
	Portfolios				
1	Community		1,178	1,135	43
2	Environment		3,187	2,580	607
3	Leisure		2,258	2,236	22
4	Planning & Regen		2,571	2,502	69
5	Resources		8,578	9,010	(432)
6		Total Portfolios	17,772	17,463	309
7	Investment Income		(1,800)	(2,179)	379
8	Technical Items		3,387	3,437	(50)
9		Net Expenditure	19,359	18,721	638
10	Use of Government Grants		(1,319)	(1,875)	556
11	**Net Revenue Budget**		**18,040**	**16,846**	**1,194**
	Financed by:				
	Business Rates				
12		Core funding	(3,096)	(3,096)	(0)
13		Growth	(2,888)	(2,853)	(35)
14		Pooling	(1,438)	(1,460)	22
15	Revenue support grant		(142)	(142)	-
16	Funding floor		(2,035)	(2,035)	-
17	National Insurance grant		(122)	(122)	-
18	Collection fund deficit		102	102	-
19	Council Tax		(8,881)	(8,853)	(28)
20		Total Financing	**(18,500)**	**(18,459)**	**(41)**
21	**Trf (to)/from working balances**		**(460)**	**(1,613)**	**1,153**
22	**Net Revenue Budget**		**18,040**	**16,846**	**1,194**

5.6 The table above shows that net expenditure including Investment Income, Technical financing adjustments and use of government grants was **£16.846 million**, **£1.194 million** (6.62%) less than the budget.

5.7 The actual expenditure on portfolio budgets was £0.309 million (1.74%) lower than anticipated with Investment Income being £0.379 million higher than expected due to interest rates not reducing as quickly as had been forecast, partially offset by additional interest due on balances held. There was also £0.556 million of additional government grants, the majority of which is a one-off receipt.

5.8 Business rates income shows minor reduced receipts of £0.013 million with the overall position, actual net expenditure and financing, resulting in a transfer to working balances of £1.613 million. This was as compared to the budgeted figure of £0.460 million.

Net Portfolio expenditure

5.9 Net portfolio expenditure was £0.309 million lower than the budget. The principal cost variations, on each portfolio are as follows ((-) is an unfavourable variance (+) is a favourable variance):

Community

- Private Sector Housing - Disabled facilities grants administration costs £16,000 (-), offset by additional capitalisation and contributions £18,000 (+), staffing variations £24,000 (-), Renters Rights grant contributed to reserves £35,000 (-), Renters Rights grant £35,000 (+) and HMO licence fee income £5,000 (+)
- Housing Act Sewage works - Lower maintenance costs £2,000 (+)
- Partnerships - reduced supplies £4,000 (+)
- Homelessness and Housing advice - Staffing variations £59,000 (+), bed and breakfast £145,000 (-), reduced operational costs £6,000 (+), additional housing benefit recovered £121,000 (+), miscellaneous income £10,000 (+), Homelessness prevention grant additional spend £68,000 (-), Homelessness prevention additional grant £68,000 (+), Supporting housing grant contributed to reserves £48,000 (-) and Supporting housing grant £48,000 (+)
- Glover street - lower maintenance costs £4,000 (+) and additional income £4,000 (+)
- CCTV - Stone Town CCTV works £18,000 (-), additional maintenance costs £5,000 (-) and reserve funding for Stone Town CCTV works £18,000 (+)

Environment

- Management and Support - staffing variations £2,000 (+) and reduced supplies etc £5,000 (+)
- Partnership Environmental Management - Biodiversity net gain module funded by grant £10,000 (-), contribution to reserves Biodiversity grant £17,000 (-), reduced operational costs £6,000 (+), Biodiversity grant £27,000 (+) and reduced contributions £9,000 (-)

- Waste - reduced supplies and services £19,000 (+), contract payments £4,000 (-), Additional Extended Producer Responsibility grant (new for 25/26 £328,000 (+), reduced chargeable garden waste income £80,000 (-), recycling credits £22,000 (+), additional miscellaneous income £9,000 (+) and special collections income £23,000 (+). Food waste grant £115,000 (+), costs of storage unit £115,000 (-), contribution towards costs of storage unit £15,000 (+), leaflets £5,000 (-) and balance of food waste grant reserve contribution £10,000 (-)
- Cleansing - reduced maintenance costs £8,000 (+) and additional utility and supplies and services £6,000 (-)
- Bereavement - staffing variations £6,000 (+), national assistance burials £2,000 (+), reduced supplies £2,000 (+), and reduced income £8,000 (-)
- Drainage - additional drainage levy fee £3,000 (-)
- Misc Highways - reduced utility and maintenance charge £9,000 (+)
- Streetscene - staffing variations £120,000 (+), additional maintenance costs £17,000 (-), reduced transport costs £48,000 (+), additional supplies £70,000 (-) and additional income £8,000 (+)
- Regulatory Services - staffing variations £9,000 (+), reduced utility costs £5,000 (-), reduced supplies £8,000 (+) and additional income £9,000 (+)
- Strategic health delivery - staffing variations £9,000 (+)
- Dog Warden - reduced contract costs £3,000 (+) and reduced supplies etc £5,000 (+)
- Pest Control - staffing variation £23,000 (+), reduced operational costs £4,000 (+) and reduced income £33,000 (-)
- Parking - staffing variations £16,000 (+), increased maintenance costs £69,000 (-), utility costs £11,000 (+), reduced supplies etc £8,000 (+) and additional income £141,000 (+)
- Markets - reduced maintenance costs £36,000 (+), utility and rates £4,000 (+), farmers market supplies £4,000 (+), and reduced income £2,000 (-)
- Climate change - staffing variations £3,000 (-), contribute balance of cost centre to reserves £13,000 (-) and additional partner contributions £17,000 (+)

Leisure

- Leisure Section - Staffing £2,000 (-) and reduced supplies £4,000 (+)
- Parks and Open Spaces - Staffing variations £16,000 (+), additional maintenance costs £14,000 (-), utility costs £11,000 (-), repairs funded by S106 £12,000 (+) transport and supplies £9,000 (+), contribution to reserves surplus and interest on sinking fund Riverway 3G pitch £27,000 (-), commuted sums income £16,000 (+), reduced use of S106 funding £12,000 (-), rent and hire of areas £18,000 (+), and additional Riverway 3G pitch income (including backdated vat adjustments £34,000 (+)
- Allotments - contribution towards operational costs £3,000 (+)

- Ancient High House - additional maintenance costs £25,000 (-)
- Izaak Walton Cottage - reduced maintenance costs £4,000 (+)
- Stafford Castle - reduced maintenance costs £5,000 (+)
- Leisure Strategy - additional maintenance costs £10,000 (-), and reduced supplies £2,000 (+)
- Events - additional supplies etc £4,000 (-)

Planning and Regeneration

- Management and Support - staffing variations £4,000 (+), additional postage costs £9,000 (-), and additional street naming income major sites £18,000 (+)
- Development Management - staffing variations £64,000 (+), reduced legal costs £18,000 (+), contribution to reserves for staffing in 2026/27 £339,000 (-), reduced reserve funding agency costs £13,000 (-), pre application charges £29,000 (+) and additional planning fee income £195,000 (+)
- Forward planning - staffing variations £48,000 (+), new local plan grant contributed to reserves £108,000 (-), additional supplies etc £5,000 (-), additional local plan costs £33,000 (-), new local plan grant £108,000 (+), reserve fund local plan £33,000 (+) and repayment of historical contribution £6,000 (+)
- Land charges - staffing variations £13,000 (+), additional SCC search fees reflecting activity £11,000 (-), reduced use of reserve funding £7,000 (-), reduced contribution form partners £7,000 (-) and additional search fee income £14,000 (+)
- Land and properties - General land and properties maintenance costs £46,000 (-), balance of dilapidation income to reserves £63,000 (-), Co-op additional costs £18,000 (-), General land and properties reserve contribution for repairs £25,000 (+), dilapidations income £70,000 (+), solar panel reduced income £13,000 (-), Guildhall additional rents £25,000 (+) and Co-op additional rents £7,000 (+)
- Economic growth and projects - Staffing variations £36,000 (+), additional supplies etc £13,000 (-), station gateway reduced spend due to delay in acquisition £89,000 (+), UKSPF reduced expenditure £13,000 (+), Station gateway reserve funding not used £89,000 (-), additional partner contributions £27,000 (+) and UKSPF reduced use of grant reflecting spend £13,000 (-)
- Borough Tourism - reduced subscription cost £7,000 (+) and reduced supplies £6,000 (+)

Resources

- Public Buildings - Additional maintenance costs £48,000 (-), rents £30,000 (-), reserve funding for repairs £38,000 (+), solar panel income £14,000 (-), and reduced rental income Stone Area Office £6,000 (-)
- Executive Management - Staffing (net of reserve contribution) £18,000 (+), Local Government Reorganisation costs £30,000 (-) and funding for Local Government Reorganisation costs £30,000 (+)
- Law and Administration - staffing variations £97,000 (+), additional maintenance costs £9,000 (-), reduced supplies etc £8,000 (+) town council consultation £27,000 (-), contribution to shared service reserve £16,000 (-), reserve fund town centre consultation £27,000 (+) and reduced income £2,000 (-)
- Finance - additional income £2,000 (+)
- Human resources - staffing variations £77,000 (+), net contribution to and from shared service reserve £75,000 (-), reduced training costs for authority £20,000 (+) and general underspends £14,000 (+)
- Technology - staffing variations £63,000 (+), net contribution from shared service reserve £3,000 (-), additional supplies etc £66,000 (-), cyber security grant £15,000 (+) and reduced income £13,000 (-)
- Revenues and Benefits - share of additional staff costs (vacancy factor) £66,000 (-), and additional income £20,000 (+)
- Additional cost of Board and Lodgings borne by authority re rent allowances and reduction in subsidy receivable overall £285,000 (-)
- Corporate and Democratic core - contribution to reserves for audit build back £41,000 (-), increased bad debts provision £19,000 (-), additional audit fees £68,000 (-) and additional audit grants £70,000 (+)
- Non distributed costs - reduced pension act increases £3,000 (+)
- Electoral registration - additional software costs £25,000 (-), staffing variations £2,000 (+) and additional income £6,000 (+)
- Members - additional national insurance costs £9,000 (-), reduced supplies etc £7,000 (+)
- Facilities management - staffing variations £28,000 (+) and income from partners for staff costs £6,000 (+)
- Corporate Business and Partnerships - reduced supplies and services £13,000 (+) and additional income £2,000 (+)
- Communications - staffing variations £7,000 (+), and reduced supplies £6,000 (+)
- Customer services - staffing variations £13,000 (+)
- Items to be allocated - corporate provision for staff turnover £ 65,000 (-), underspend estimate across the authority £100,000 (-), contribution to reserves income suspense account £236,000 (-) and write off historical income suspense account £236,000 (+)

- Insurance premiums - net MMI levy settlement and legal fees £7,000 (-)

5.10 A summary of performance of the main streams of income against budget is set out in the following table:

Main Streams of Income			
	Revised	**Actual**	**Variance**
	£'000	**£'000**	**£'000**
Waste & Recycling	(4,011)	(4,329)	318
Bereavement Services	(2,001)	(1,993)	(8)
Regulatory Services	(233)	(237)	4
Development Management	(1,400)	(1,624)	224
Land Charges - Local Searches	(93)	(107)	14
Off Street Parking Services	(2,599)	(2,722)	123
Public Buildings	(534)	(515)	(19)
Revenues and Benefits	(364)	(344)	(20)
Total Main Sources	**(11,235)**	**(11,871)**	**636**

5.11 Overall income levels were £0.636 million higher than the revised budget. The major variation related to Waste and Recycling the majority of which was for the Extended Producer Responsibility grant (new for 2025/26), this grant is dependent on payments by producers into the scheme which is then redistributed. There is no certainty that this additional income will continue into 2026/27. Development Management and Off-Street Parking all showed additional income.

5.12 More detailed explanations for all expenditure and income variances greater than £10,000 and 10% are attached for each portfolio at **APPENDIX 1**.

Working Balances

5.13 The final outturn shows a contribution to working balances to the General Fund of £1.613 million with a resultant £5.007 million balance as at the 31 March 2026. As the Council policy is to retain a working balance of £1.0 million the £4.007 million above this balance is available to support delivery and council priorities.

5.14 **APPENDIX 3** details several schemes that are to be funded from general fund reserves following a prioritisation review of potential schemes at the council.

Business Rates Retention

5.15 The Business Rates Retention Scheme forms part of the current Funding regime for Local Government and incentivises Councils to promote economic growth in their area as they are entitled to retain a share of business rates growth.

5.16 The scheme came into operation with effect from April 2013. Income is shared between central government, the Council, Staffordshire County Council, Staffordshire Commissioner Fire and Rescue Service and the Stoke on Trent and Staffordshire Business Rates Pool. The pool has ceased to operate in 2026/27 due to changes in central government policy around the business rate reset.

5.17 Overall business rates income was £0.013 million lower than anticipated, this related to changes in growth, section 31 grants and pool distribution.

Capital Outturn

5.18 The Council approves the Capital Programme for the financial year as part of the budget process and the amount that can be spent is limited by the amount of capital resources available to the Council. The 2025/26 capital programme was approved in February 2025 and updated as part of the revised budget set as part of the 26/27 budget cycle.

5.19 Many of the schemes within the Capital Programme take some time to develop and implement so the detailed programme can experience many changes. Considerable variation will therefore arise over the 18-month period from the time the Capital Programme for the financial year is initially considered, right through to the end of March of the relevant year.

5.20 The Council spent £29.179 million on capital projects in 2025/26 which was £11.963 million less than the budget of £41.142 million. The main reason for the difference in 2024/25 is scheme slippage where the scheme will proceed later than planned and the expenditure will occur in a future year. This mainly related to Future High Street spend £10.5 million, There is also an underspend of £1.174 million in relation to the Food Waste grant, this element primarily related to vehicle purchase, this has been slipped to 2026/27 financial year.

Capital Outturn Position			
	Budget	Actual	Variance from Budget
	£'000	£'000	£'000
Community	2,405	2,148	257
Environment	2,071	769	1,302
Leisure	332	703	(371)
Planning and Regeneration	15,499	4,759	10,740
Resources	20,835	20,800	35
Total	**41,142**	**29,179**	**11,963**

5.21 The major items of capital spend in the year were:

- **£20,766,000** on Civic Centre purchase
- **£3,494,719** on Future High Streets
- **£2,139,863** on the provision of grants for disabled adaptations in homes;
- **£898,512** on Station Gateway
- **£453,465** on Stone Leisure Phase 2
- **£288,068** on Food Waste

The Civic Centre purchase reflects the buy out of the long lease obligation to 2074/75 and consequently the rentals payable. This will therefore have an ongoing revenue budget reduction of £731,600 per annum based on the rentals payable at the time of settlement of the lease. The Council has used reserves to fund this spend in full. The Food Waste spend is for the purchase of food waste caddies which is funded by grant.

The detailed Capital Programme outturn for 2025/26 is attached at **APPENDIX 2** along with explanations for major variations.

5.22 The capital programme of £29.179 million was financed in the following way:

	£'000
Grants and contributions	10,950
Capital Receipts	227
Direct Revenue Financing	18,002
	29,179

Collection Fund

5.23 Stafford Borough is the billing authority and as such has a statutory requirement to establish and maintain a separate fund covering the collection and distribution of amounts due in respect of council tax and national non-domestic rates (NNDR). Net Business Rates attributable to the Council are accounted for as part of the General Fund under the new Business Rates regime.

Council Tax

5.24 The net position on the Collection Fund for the year was a surplus of £2.266 million. The overall position after taking account the balance brought forward in relation to previous years' surpluses, leaves a net surplus on the fund of £1.931 million on 31 March 2026 (of which £0.183 million relates to this Council).

National Non-Domestic Rates

5.25 A deficit of £0.884 million exists in relation to Business Rates as of 31 March 2026. The deficit is however notional and represents a timing difference between estimated Business Rates returns and actual returns. This Council's actual retained Business Income is in line with the Income and Expenditure account after taking into account the timing deficit required as part of the Collection Fund Statutory requirements.

6 Implications

6.1 Financial

The financial implications have been referred to throughout the report.

6.2 Legal

The legal implications have been referred to throughout the report.

6.3 Human Resources

There are no human resource implications arising from this report.

6.4 Risk Management

None

6.5 Equalities and Diversity

None

6.6 Health

None

6.7 Climate Change

None

7. Appendices

Appendix 1: Detailed Revenue Outturn 2025/26

Appendix 2 - Capital Outturn 2025/26

Appendix 3 – Schemes funded from General Fund Reserves

8 Previous Consideration

None

9 Background Papers

Available in Financial Services

Contact Officer:	Emma Fullagar
Telephone Number:	01543 464720
Ward Interest:	All
Report Track:	Cabinet 17 September 2026 (Only)
Key Decision:	Yes

COMMUNITY PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Private Sector Housing (Stdrs)					
Expenditure	606,720	679,981	(73,261)	(12.1%)	Staffing variations (£24k), Renters Rights grant contributed to reserves (£35k). Additional disabled facility grants administration costs (£16k)
Income	(443,710)	(499,919)	56,209	(12.7%)	Renters Rights grant £35k, disabled facility grant partner contributions £18k and minor variations
Net	**163,010**	**180,062**	**(17,052)**		
Housing Act Sewerage Works					
Expenditure	2,210	-	2,210	100.0%	
Net	**2,210**	**-**	**2,210**		
PSH (Loans & Mortgages)					
Expenditure	5,850	6,230	(380)	(6.5%)	
Income	(9,750)	(8,445)	(1,305)	13.4%	
Net	**(3,900)**	**(2,215)**	**(1,685)**		
Partnerships					
Expenditure	142,520	138,375	4,145	2.9%	
Income	(117,380)	(118,097)	717	(0.6%)	
Net	**25,140**	**20,278**	**4,862**		

SBC

COMMUNITY PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Homelessness & Housing Advice					
Expenditure	1,995,790	2,198,753	(202,963)	(10.2%)	Staffing variations £59k, bed and breakfast costs (£145k). Homeless prevention grant additional spend (£68k), contribution to reserve Supporting housing grant (£48k) and Asylum grant to reserves (£6k)
Income	(1,320,620)	(1,575,114)	254,494	(19.3%)	Housing benefit recovered £121k, homeless prevention additional grant £68k, Supported housing grant £48k. Asylum grant £6k and minor variations
Net	**675,170**	**623,638**	**51,532**		
Glover Street					
Expenditure	17,950	14,456	3,494	19.5%	
Income	(29,000)	(33,017)	4,017	(13.9%)	
Net	**(11,050)**	**(18,561)**	**7,511**		
Grants and Contributions					
Expenditure	145,250	145,250	-	0.0%	
Net	**145,250**	**145,250**	**-**		
CCTV					
Expenditure	182,530	204,751	(22,221)	(12.2%)	Stone Town CCTV works (£18k) and additional maintenance costs
Income	-	(18,000)	18,000	n/a	Reserve funding for Stone Town CCTV works
Net	**182,530**	**186,751**	**(4,221)**		
Portfolio Total	**1,178,360**	**1,135,204**	**43,156**	**3.7%**	

ENVIRONMENT PORTFOLIO **APPENDIX 1**

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Management & Support					
Expenditure	234,080	226,779	7,301	3.1%	
Net	**234,080**	**226,779**	**7,301**		
Partnership Environmental Mgmt					
Expenditure	99,160	120,765	(21,605)	(21.8%)	Biodiversity net gain module funded by grant (£10k), contribution to reserves biodiversity grant (£17k) and reduced supplies £6k
Income	(34,170)	(52,057)	17,887	(52.3%)	Biodiversity grant £27k and reduced contributions (£9k)
Net	**64,990**	**68,707**	**(3,717)**		
Waste & Recycling					
Expenditure	5,287,530	5,402,613	(115,083)	(2.2%)	
Income	(4,038,720)	(4,471,460)	432,740	(10.7%)	Additional Extended Producer Responsibility grant (new for 25/26) £328k, reduced chargeable garden waste income (£80k), recycling credits £22k and special collections £23k. Food waste grant £116k, contribution towards costs £15k and minor variations
Net	**1,248,810**	**931,152**	**317,658**		
Cleansing Services					
Expenditure	119,870	118,037	1,833	1.5%	
Income	-	-	-	n/a	
Net	**119,870**	**118,037**	**1,833**		

ENVIRONMENT PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Bereavement Services					
Expenditure	867,240	857,353	9,887	1.1%	
Income	(2,013,800)	(2,006,140)	(7,660)	0.4%	
Net	**(1,146,560)**	**(1,148,787)**	**2,227**		
Drainage Services					
Expenditure	134,890	137,575	(2,685)	(2.0%)	
Net	**134,890**	**137,575**	**(2,685)**		
Misc Highways Functions					
Expenditure	44,940	36,228	8,712	19.4%	Reduced maintenance costs £6k and minor variations
Income	(5,000)	(5,000)	-	0.0%	
Net	**39,940**	**31,228**	**8,712**		
Street Scene					
Expenditure	3,049,610	2,969,274	80,336	2.6%	
Income	(725,900)	(734,405)	8,505	(1.2%)	
Net	**2,323,710**	**2,234,869**	**88,841**		
Regulatory Services					
Expenditure	900,930	888,333	12,597	1.4%	
Income	(234,560)	(244,067)	9,507	(4.1%)	
Net	**666,370**	**644,266**	**22,104**		
Strategic Health Delivery					
Expenditure	46,890	37,970	8,920	19.0%	Staffing variations
Net	**46,890**	**37,970**	**8,920**		

ENVIRONMENT PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Dog Warden Service					
Expenditure	38,680	30,023	8,657	22.4%	Reduced contract costs £3k and general supplies underspend
Income	(15,000)	(15,000)	-	0.0%	
Net	**23,680**	**15,023**	**8,657**		
Pest Control					
Expenditure	237,380	211,184	26,196	11.0%	Staffing variations £23k and lower operational costs £4k
Income	(161,030)	(127,833)	(33,197)	20.6%	Reduced services provided
Net	**76,350**	**83,351**	**(7,001)**		
Off street Parking					
Expenditure	1,682,450	1,715,418	(32,968)	(2.0%)	
Income	(2,700,240)	(2,841,215)	140,975	(5.2%)	
Net	**(1,017,790)**	**(1,125,797)**	**108,007**		
Borough Markets					
Expenditure	104,070	56,838	47,232	45.4%	Reduced maintenance costs £36k, utility and rates £4k, farmers market supplies £4k and minor variations
Income	(27,300)	(25,439)	(1,861)	6.8%	
Net	**76,770**	**31,399**	**45,371**		
Climate Change					
Expenditure	70,990	87,935	(16,945)	(23.9%)	Staffing (£3k), contribute balance of cost centre to reserves (£13k)
Income	-	(16,945)	16,945	n/a	Contribution from partners
Net	**70,990**	**70,990**	**-**		

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ENVIRONMENT PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Trees					
Expenditure	245,400	223,650	21,750	8.9%	
Income	(21,750)	-	(21,750)	100.0%	Reserve funding not actioned due to lower spend
Net	**223,650**	**223,650**	**-**		
Portfolio Total	**3,186,640**	**2,580,414**	**606,226**	**19.0%**	

LEISURE AND CULTURE PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Leisure Section					
Expenditure	124,600	122,537	2,063	1.7%	
Income	-	-	-	n/a	
Net	**124,600**	**122,537**	**2,063**		
Parks & Open Spaces					
Expenditure	872,090	885,670	(13,580)	(1.6%)	
Income	(143,910)	(202,530)	58,620	(40.7%)	Commuted sums £16k, reduce use of S106 funding due to lower costs (£12k), rent and hire of areas £18k and additional Riverway 3G pitch income £34k (including backdated VAT adjustment)
Net	**728,180**	**683,140**	**45,040**		
Allotments					
Expenditure	19,500	18,834	666	3.4%	
Income	(830)	(3,599)	2,769	(333.6%)	
Net	**18,670**	**15,235**	**3,435**		
Stafford Gatehouse Theatre					
Expenditure	-	(192)	192	n/a	
Net	**-**	**(192)**	**192**		
Ancient High House					
Expenditure	10,540	35,228	(24,688)	(234.2%)	Additional maintenance costs
Net	**10,540**	**35,228**	**(24,688)**		

LEISURE AND CULTURE PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Broadeye Windmill					
Expenditure	890	2,613	(1,723)	(193.6%)	
Income	-	(1)	1	n/a	
Net	**890**	**2,612**	**(1,722)**		
Izaak Walton Cottage					
Expenditure	8,480	4,390	4,090	48.2%	
Net	**8,480**	**4,390**	**4,090**		
Stafford Castle					
Expenditure	12,940	7,530	5,410	41.8%	Reduced maintenance costs £7k, partly offset by additional supplies
Net	**12,940**	**7,530**	**5,410**		
Leisure Management Contract					
Expenditure	1,297,290	1,293,884	3,406	0.3%	
Income	(475,330)	(471,994)	(3,336)	0.7%	
Net	**821,960**	**821,890**	**70**		
Leisure Strategy					
Expenditure	496,870	505,801	(8,931)	(1.8%)	
Income	-	(1,450)	1,450	n/a	
Net	**496,870**	**504,351**	**(7,481)**		
Events					
Expenditure	35,200	38,744	(3,544)	(10.1%)	
Net	**35,200**	**38,744**	**(3,544)**		
Portfolio Total	**2,258,330**	**2,235,465**	**22,865**	**1.0%**	

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PLANNING AND REGENERATION PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Management and Support					
Expenditure	261,790	267,841	(6,051)	(2.3%)	
Income	(14,270)	(33,993)	19,723	(138.2%)	Street naming additional income major sites £18k
Net	**247,520**	**233,848**	**13,672**		
Building Control					
Expenditure	282,170	282,308	(138)	0.0%	
Income	-	-	-	n/a	
Net	**282,170**	**282,308**	**(138)**		
Development Management					
Expenditure	2,316,780	2,570,251	(253,471)	(10.9%)	Staffing £64k, reduced legal costs £18k, contribution to reserves for staffing in 2026/27 (£339k) and minor variations
Income	(1,639,140)	(1,849,663)	210,523	(12.8%)	Reduced reserve funding agency costs (£13k), pre applications charges £29k and additional planning fee income £195k
Net	**677,640**	**720,588**	**(42,948)**		
Forward Planning					
Expenditure	520,370	620,311	(99,941)	(19.2%)	Staffing £48k, new local plan grant contributed to reserves (£108k), additional local plan costs (£33k) and minor variations
Income	(22,590)	(170,571)	147,981	(655.1%)	New local plan grant £108k, reserve funding local plan £33k and repayment of historical contribution £6k
Net	**497,780**	**449,740**	**48,040**		

PLANNING AND REGENERATION PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Land Charges - Local Searches					
Expenditure	189,970	187,975	1,995	1.1%	
Income	(182,770)	(182,483)	(287)	0.2%	
Net	**7,200**	**5,492**	**1,708**		
Land & Properties					
Expenditure	621,590	751,023	(129,433)	(20.8%)	General land and properties maintenance costs (£46k), balance of dilapidation income to reserves (£63k) and Co-op site additional costs (£18k)
Income	(265,770)	(379,077)	113,307	(42.6%)	General land and properties reserve contribution for repairs £25k, solar panel reduced income (£13k), dilapidations income £70k, Guildhall additional rents £25k, Co-op additional rents £7k and minor variations
Net	**355,820**	**371,946**	**(16,126)**		
Economic Growth & Projects					
Expenditure	1,817,660	1,691,968	125,692	6.9%	
Income	(1,335,980)	(1,261,894)	(74,086)	5.5%	
Net	**481,680**	**430,074**	**51,606**		
Borough Tourism					
Expenditure	20,640	8,040	12,600	61.0%	Reduced subscription cost £7k and general supplies underspend
Net	**20,640**	**8,040**	**12,600**		
Portfolio Total	**2,570,450**	**2,502,036**	**68,414**	**2.7%**	

RESOURCES PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Public Buildings					
Expenditure	706,050	782,869	(76,819)	(10.9%)	Additional maintenance costs (£48k), rents (£30k) and minor variations
Income	(534,430)	(553,436)	19,006	(3.6%)	
Net	**171,620**	**229,434**	**(57,814)**		
Executive Management					
Expenditure	1,046,430	1,056,931	(10,501)	(1.0%)	
Income	(159,370)	(189,294)	29,924	(18.8%)	Reserve funding for Local Government Reorganisation costs £30k
Net	**887,060**	**867,637**	**19,423**		
Law and Administration					
Expenditure	1,491,340	1,439,048	52,292	3.5%	
Income	(465,160)	(489,590)	24,430	(5.3%)	
Net	**1,026,180**	**949,459**	**76,721**		
Finance					
Expenditure	891,160	890,784	376	0.0%	
Income	-	(1,589)	1,589	n/a	
Net	**891,160**	**889,195**	**1,965**		
Human Resources Services					
Expenditure	812,070	780,899	31,171	3.8%	
Income	(291,900)	(298,239)	6,339	(2.2%)	
Net	**520,170**	**482,660**	**37,510**		

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RESOURCES PORTFOLIO **APPENDIX 1**

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Technology					
Expenditure	2,216,660	2,216,798	(138)	0.0%	
Income	(1,197,830)	(1,194,333)	(3,497)	0.3%	
Net	**1,018,830**	**1,022,465**	**(3,635)**		
Revenues & Benefits					
Expenditure	1,854,470	1,923,341	(68,871)	(3.7%)	
Income	(806,950)	(827,240)	20,290	(2.5%)	
Net	**1,047,520**	**1,096,101**	**(48,581)**		
Housing Benefit Payments					
Expenditure	14,843,200	15,648,755	(805,555)	(5.4%)	
Income	(14,637,490)	(15,157,737)	520,247	(3.6%)	
Net	**205,710**	**491,018**	**(285,308)**		
Parish Councils					
Expenditure	51,000	51,129	(129)	(0.3%)	
Net	**51,000**	**51,129**	**(129)**		
Corporate and Democratic Core					
Expenditure	321,640	450,522	(128,882)	(40.1%)	Additional audit fees (£68k), contribution to reserves for audit build back (£41k) and increased bad debts provision (£19k)
Income	-	(69,483)	69,483	n/a	Audit backstop grant £49k and Redmond Review audit grant £21k
Net	**321,640**	**381,039**	**(59,399)**		
Non-Distributed Costs					
Expenditure	266,730	264,094	2,636	1.0%	
Net	**266,730**	**264,094**	**2,636**		

RESOURCES PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget £	Total Spend to Date £	Variance from Annual Budget £	%	Comments (variances > 10% and £5,000)
Asset Mgmt Energy Conservation					
Expenditure	53,920	55,067	(1,147)	(2.1%)	
Net	**53,920**	**55,067**	**(1,147)**		
Electoral Registration					
Expenditure	47,200	70,192	(22,992)	(48.7%)	Additional software costs (£25k), partly offset by staffing variations
Income	-	(6,220)	6,220	n/a	
Net	**47,200**	**63,972**	**(16,772)**		
Elections					
Expenditure	39,500	39,064	436	1.1%	
Income	-	436	(436)	n/a	
Net	**39,500**	**39,500**	**-**		
Members Services					
Expenditure	352,780	354,392	(1,612)	(0.5%)	
Income	-	(39)	39	n/a	
Net	**352,780**	**354,353**	**(1,573)**		
Out of Hours Service					
Expenditure	9,000	8,997	3	0.0%	
Net	**9,000**	**8,997**	**3**		
Facilities Management					
Expenditure	403,150	373,438	29,712	7.4%	
Income	-	(6,520)	6,520	n/a	
Net	**403,150**	**366,918**	**36,232**		

RESOURCES PORTFOLIO **APPENDIX 1**

Final Accounts 2025-26

	Annual Budget £	Total Spend to Date £	Variance from Annual Budget £	%	Comments (variances > 10% and £5,000)
Corporate Business & Partners					
Expenditure	255,440	241,335	14,105	5.5%	
Income	-	(1,765)	1,765	n/a	
Net	**255,440**	**239,570**	**15,870**		
Communications					
Expenditure	181,560	169,070	12,490	6.9%	
Net	**181,560**	**169,070**	**12,490**		
Customer Services					
Expenditure	404,650	391,538	13,112	3.2%	
Net	**404,650**	**391,538**	**13,112**		
Items to be Allocated					
Expenditure	(139,240)	262,088	(401,328)	288.2%	Budget provision across the authority outturn estimate (£100k), corporate vacancy factor (£65k) and contribution to reserves income suspense account (£236k)
Income	-	(236,378)	236,378	n/a	Write off historical suspense account
Net	**(139,240)**	**25,710**	**(164,950)**		
Audit Risk Resilience Procure					
Expenditure	274,140	273,929	211	0.1%	
Net	**274,140**	**273,929**	**211**		
Insurance Premiums					
Expenditure	288,680	314,140	(25,460)	(8.8%)	
Income	-	(17,534)	17,534	n/a	
Net	**288,680**	**296,607**	**(7,927)**		

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RESOURCES PORTFOLIO

APPENDIX 1

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Property Maintenance					
Expenditure	559,890	614,540	(54,650)	(9.8%)	
Income	(559,890)	(614,540)	54,650	(9.8%)	
Net	**-**	**-**	**-**		
Portfolio Total	**8,578,400**	**9,009,461**	**(431,061)**	**(5.0%)**	

COMMUNITY CAPITAL PORTFOLIO

APPENDIX 2

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
DISABLED FACILITIES GRANT DFG					
Expenditure	2,368,630	2,139,863	228,767	9.7%	Reflects activity, balance to be slipped to 2026/27
Net	**2,368,630**	**2,139,863**	**228,767**		
EMPTY HOMES					
Expenditure	9,580	-	9,580	100.0%	Spend rephased to 2026/27
Net	**9,580**	**-**	**9,580**		
PRIVATE SECTOR HOUSING ASSISTANCE					
Expenditure	26,930	8,300	18,630	69.2%	Expenditure reflects demand
Net	**26,930**	**8,300**	**18,630**		
Portfolio Total	**2,405,140**	**2,148,163**	**256,977**	**10.7%**	

ENVIRONMENT CAPITAL PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
STREETSCENE EQUIPMENT					
Expenditure	25,000	15,500	9,500	38.0%	Balance to slip to 2026/27
Net	**25,000**	**15,500**	**9,500**		
GREEN CONTAINERS REPLACEMENT PROGRAMME					
Expenditure	72,180	59,328	12,852	17.8%	Reflects purchases, balance to slip to 2026/27
Net	**72,180**	**59,328**	**12,852**		
BLUE BINS					
Expenditure	8,250	16,572	(8,322)	(100.9%)	Reflects purchases, funding brought forward from 2026/27
Net	**8,250**	**16,572**	**(8,322)**		
Food Waste					
Expenditure	1,463,000	288,068	1,174,932	80.3%	Budget to slip to 2026/27, grant included for the purchase of food waste vehicles
Net	**1,463,000**	**288,068**	**1,174,932**		
WASTE CONTAINERS REPLACEMENT					
Expenditure	75,610	6,675	68,935	91.2%	Reflects purchases, balance to slip to 2026/27
Net	**75,610**	**6,675**	**68,935**		
STREETSCENE FLEET PROCUREMENT					
Expenditure	154,150	151,450	2,700	1.8%	
Net	**154,150**	**151,450**	**2,700**		
Car Park Systems					
Expenditure	232,000	231,740	261	0.1%	
Net	**232,000**	**231,740**	**261**		

ENVIRONMENT CAPITAL PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Tree System					
Expenditure	41,000	-	41,000	100.0%	No longer capital will be revenue cost
Net	**41,000**	**-**	**41,000**		
Portfolio Total	**2,071,190**	**769,333**	**1,301,858**	**62.9%**	

LEISURE CAPITAL PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
STONE LEISURE PHASE 2					
Expenditure	109,100	453,465	(344,365)	(315.6%)	Scheme elements slipped to 2026/27 Budget, but delivered in 2025/26
Net	**109,100**	**453,465**	**(344,365)**		
Yarnfield					
Expenditure	48,190	48,195	(5)	0.0%	
Net	**48,190**	**48,195**	**(5)**		
SLC Solar Panels					
Expenditure	-	(31)	31	n/a	
Net	**-**	**(31)**	**31**		
Yelverton Park					
Expenditure	12,530	6,672	5,858	46.8%	Balance of scheme to slip to 2025/26
Net	**12,530**	**6,672**	**5,858**		
Rowley Park Stadium Play Facilities					
Expenditure	-	2,995	(2,995)	n/a	Minor spend, budget in 2026/27
Net	**-**	**2,995**	**(2,995)**		
Beech Road Play Area					
Expenditure	90,270	90,277	(7)	0.0%	
Net	**90,270**	**90,277**	**(7)**		
King Edward and Stafford Hockey					
Expenditure	48,870	48,873	(3)	0.0%	
Net	**48,870**	**48,873**	**(3)**		

LEISURE CAPITAL PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Hixon Cricket Wickets					
Expenditure	-	29,815	(29,815)	n/a	S106 funded scheme approved later in the year
Net	**-**	**29,815**	**(29,815)**		
Tittensor Play Area					
Expenditure	22,500	22,487	13	0.1%	
Net	**22,500**	**22,487**	**13**		
Portfolio Total	**331,460**	**702,748**	**(371,288)**	**(112.0%)**	

PLANNING AND REGENERATION CAPITAL PORTFOLIO

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
FHSF Public Realm					
Expenditure	-	(15,395)	15,395	n/a	Settlement balance for final payment
Net	**-**	**(15,395)**	**15,395**		
UK Shared Prosperity Fund					
Expenditure	282,270	235,000	47,270	16.7%	Balance of leisure services improvement slipped to 2026/27
Net	**282,270**	**235,000**	**47,270**		
Rural England Prosperity Fund REPF					
Expenditure	146,350	146,355	(5)	0.0%	
Net	**146,350**	**146,355**	**(5)**		
FHSF Co-op					
Expenditure	9,733,960	1,489,251	8,244,709	84.7%	Scheme ongoing, balance of funding rephased to 2026/27
Net	**9,733,960**	**1,489,251**	**8,244,709**		
FHSF Station approach					
Expenditure	147,000	212,596	(65,596)	(44.6%)	Scheme ongoing, balance of funding rephased to 2026/27
Net	**147,000**	**212,596**	**(65,596)**		
FHSF Guildhall					
Expenditure	3,797,140	1,355,049	2,442,091	64.3%	Scheme ongoing, balance of funding rephased to 2026/27
Net	**3,797,140**	**1,355,049**	**2,442,091**		

PLANNING AND REGENERATION CAPITAL PORTFOLIO

APPENDIX 2

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
Former Wilko					
Expenditure	332,000	437,824	(105,824)	(31.9%)	Scheme ongoing, balance of funding rephased to 2026/27
Net	**332,000**	**437,824**	**(105,824)**		
Station Gateway					
Expenditure	1,060,000	898,512	161,488	15.2%	Scheme ongoing, balance of funding rephased to 2026/27
Net	**1,060,000**	**898,512**	**161,488**		
Portfolio Total	**15,498,720**	**4,759,191**	**10,739,529**	**69.3%**	

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RESOURCES CAPITAL PORTFOLIO

APPENDIX 2

Final Accounts 2025-26

	Annual Budget	Total Spend to Date	Variance from Annual Budget		Comments (variances > 10% and £5,000)
	£	£	£	%	
CORPORATE IT EQUIPMENT					
Expenditure	69,370	34,238	35,132	50.6%	Spend rephased to 2026/27
Net	**69,370**	**34,238**	**35,132**		
Civic Centre Purchase					
Expenditure	20,766,000	20,766,000	-	0.0%	
Net	**20,766,000**	**20,766,000**	**-**		
Portfolio Total	**20,835,370**	**20,800,238**	**35,132**	**0.2%**	

Following a review of potential schemes at the council, a list of priority schemes was determined and is detailed below. These schemes will be added to the revenue budget for 2026/2027 and will be funded from general fund reserves. There is sufficient budget in the reserves to fund them.

Scheme name	Detail	Budget £k
St Michaels Church - Jervis Mausoleum	Following the completion of restoration works, the Church requires £15k to install hard standing around the Jervis mausoleum. This will be a one off grant payment to the Church.	15
Repair of narrowboat at the entrance to Stone	The narrowboat at the entrance to Stone has fallen into disrepair and requires significant maintenance. This work will be undertaken by Stone Town council, funded by a one off grant.	12
Grant payment to junior park run in Westbridge park	A one off grant payment will be made to junior park run to allow it to take place in Westbridge park	4
Paths around Victoria Park	The paths around the bowling green are deteriorating and need to be rebounded.	139
Sensory park in Victoria Park	A new sensory garden will be installed in Victoria park.	30
Replacement of fencing around Coton Field allotments	A one off grant will be made to the new Town council once it has been set up to undertake this large scale project to repair/paint the fencing around the allotments. A maximum of £80k will be made available.	80
Parks enhancements	New equipment and accessibility as determined on a case by case basis	120
Feasibility studies/commissioning work to support regeneration schemes	The regeneration programmes underway will require additional revenue budgets to enable them to progress successfully	200
Total		600

Agenda Item 4(a)ii

Updated Strategic Risk Register

Committee: Cabinet

Date of Meeting: 17 September 2026

Report of: Head of Business Support and Assurance

Portfolio: Resources Portfolio

1 Purpose of Report

1.1 To set out details of the Council's Strategic Risk Register as at 30 June 2026

2 Recommendations

2.1 That Cabinet approves the Strategic Risk Register and considers the progress made in the identification and management of the strategic risks.

Reasons for Recommendations

2.2 Cabinet are required to approve the Strategic Risk Register.

3 Key Issues

3.1 All strategic risks and associated action plans have been reviewed and updated for 30 June 2026, and the Council's risk profile is summarised in the table below

Risk Status	Number of Risks at 1 April 2026	Number of Risks at 30 June 2026
Red (High)	**5**	**5**
Orange (Medium)	**4**	**5**
Yellow (Moderate)	**0**	**0**
Green (Low)	**0**	**0**
Blue (Negligible)	**0**	**0**
TOTAL	**9**	**10**

4 Relationship to Corporate Priorities

4.1 Risk Management as a process supports the Council's Effective Council priority

4.2 The Risk Register supports the Council's Corporate Priorities as follows:

(i) Risk management is a systematic process by which key business risks/opportunities are identified, prioritised, and controlled so as to contribute towards the achievement of the Council's aims and objectives.

(ii) The strategic risks set out in the Appendices have been categorised against the Council's priorities.

5 Report Detail

5.1 The Accounts and Audit Regulations 2015 state that:

"A relevant body must ensure that it has a sound system of internal control which:-

(a) facilitates the effective exercise of its functions and the achievement of its aims and objectives;

(b) ensures that the financial and operational management of the authority is effective; and

(c) includes effective arrangements for the management of risk."

5.2 Risk can be defined as uncertainty of outcome (whether positive opportunity or negative threat). Risk is ever present and some amount of risk-taking is inevitable if the council is to achieve its objectives. The aim of risk management is to ensure that the council makes cost-effective use of a risk process that has a series of well-defined steps to support better decision making through good understanding of risks and their likely impact.

Management of Strategic Risks/Opportunities

5.3 Central to the risk management process is the identification, prioritisation, and management of strategic risks/opportunities. Strategic Risks are those that could have a significant impact on the Council's ability to deliver its Corporate Priorities and Objectives.

5.4 The Strategic Risk Register was refreshed in April 2026 and this is the first quarterly updated since the refreshed risk register was presented to Members. The update Strategic Risk Register is attached as **APPENDIX 1**. Work has continued to enhance and refine the risks and actions identified to manage them as the Strategic Risk Register matures.

5.5 The risk summary illustrates the risks/opportunities using the “traffic light” method i.e.

Red	High risk, score 12 and above (action plan required to reduce risk and/or regular monitoring by Cabinet/Audit Committee)
Orange	Medium risk, score 6 to 9 (action plan required to reduce risk and monitored by Leadership Team)
Yellow	Moderate risk, score of 3 to 4 (risk within risk appetite, no action plan required but watching brief to ensure controls are effective and operating)
Green	Low risk, score below 3 (risk tolerable, no action plan required)
Blue	Negligible Risk, score of 1 (risk tolerable, no action plan required)

5.6 The summary risk register and detailed information on Red Risks are reported tp Cabinet and the Audit Committee throughout the year. The updated risk register as at 1 April 2026 is attached at **APPENDIX 1** and detailed information on all risks at **APPENDIX 2**.

5.7 Leadership Team monitor the progress on all risks throughout the year and will advise on any changes to risk scores.

5.8 At the 30 June, no risk scores have changed in the quarter and there have been no major revisions to the wording and definitions of the risks, however work has been progressing on the action plans for each risk.

6 Implications

6.1 Financial

None

6.2 Legal

None

6.3 Human Resources

None

6.4 Risk Management

The Risk Management implications are included within the body of the report and appendices.

6.5 Equalities and Diversity

None

6.6 Health

None

6.7 Climate Change

None

7 Appendices

Appendix 1 - Summary of Strategic Risks - 30 June 2026

Appendix 2 - Strategic Risk Register as at 30 June 2026

8 Previous Consideration

None

9 Background Papers

File of papers held by the Chief Internal Auditor & Risk Manager.

Contact Officer:	Stephen Baddeley
Telephone Number:	01543 464415
Ward Interest:	All
Report Track:	Cabinet 17/9/26
	Audit and Accounts Committee 29/09/2026
Key Decision:	N/A

Appendix 1

Stafford Borough Council
Summary of Strategic Risk Register as at 30 June 2026

Risk Ref	Risk Owner	Risk Name	Inherent Risk Score	Residual Risk Score April	Residual Risk Score June	Direction of Travel in Period	Target Score
2025-03	Chief Executive	Local Government reorganisation	16	12	12	⟷	8
2025-06	Chief Executive	Corporate capacity	16	12	12	⟷	12
2025-09	Operations	Safe Management of Trees	16	12	12	⟷	8
2025-16	Economic Development and Planning	Delivery of Town Centre Regeneration Project	16	12	12	⟷	8
2025-08	Deputy Chief Executive (Resources)	Financial Stability - SBC	16	9	9	⟷	9
2025-04	Transformation and Assurance	IT Resilience	16	8	8	⟷	8
2025-10	Deputy Chief Executive (Resources)	Failure to deliver good governance	16	8	8	⟷	4
2025-02	Housing and Corporate Assets	Health and safety arrangements for properties	12	12	12	⟷	8

[SBC]

Risk Ref	Risk Owner	Risk Name	Inherent Risk Score	Residual Risk Score April	Residual Risk Score June	Direction of Travel in Period	Target Score
2025-12	Chief Executive	Health and safety arrangements for people	**12**	**8**	**8**	⟷	**4**

Key to Direction of Travel

↓	Risk has decreased	⟷	Risk level unchanged	↑	Risk has increased

Appendix 2

Stafford Borough Council
Strategic Risk Register as at 30 June 2026

Risk Ref	2025-02
Risk Owner	Head of Housing and Corporate Assets
Risk Name	Safety and compliance arrangements for properties
Risk Description	Operational property procedures including CDM compliance, maintenance and management of properties is not sufficient to adequately ensure they are safe for tenants, employees, leaseholders or visitors leading to death or serious injury.
Consequences	Death or serious and minor injury and prosecution by HSE and private legal action. Reputational damage. Deterioration in condition of buildings. Depreciation of buildings.
Corporate Objective SBC	Effective Council
Main Risk Category	Health and Safety

Inherent Impact	**Inherent Likelihood**	**Inherent Risk Score**
4	3	12
Residual Impact	**Residual Likelihood**	**Residual Risk Score**
4	3	12
Target Score		8

Comment on Target Score:
There are situations outside our control which may lead to accidents, and holding a large property portfolio means that a risk score of 4 is unlikely, as accidents and incidents may still happen.

Actions

Actions Planned	**Person Responsible**	**Timescale**	**Progress/Comments**
Review of Health and Safety Compliance Records of Contractors	Corporate Asset Manager	Q1 2026-27	The framework has been set up to identify what is required from each contractor as they are all different. The initial correspondence to collate the data has been sent out. Information is being received and collated.

Actions Planned	Person Responsible	Timescale	Progress/Comments
Appoint Contractor to undertake Building Condition Surveys (prioritise top 5 - 60 in total)	Corporate Asset Manager	Q1 2026-27	This action has been delayed due to contractor capacity. 80% of surveys are complete and assurance has been given that the remaining surveys will be completed by the end of September.
Asset reviews will be carried out on all Council properties.	Corporate Asset Manager	Quarter 4 2026-27 (on-going)	Due to limited staffing resources and the implications of LGR this action is on hold.

Progress Updates

Current Position	Fire Compartmentation works are being scheduled for the Civic Centre. The Survey has been completed; remedial actions are being progressed. Due to the nature of actions identified it will take time to reduce the risk score as some of the actions require specialist skill set of which there is limited availability within the existing team.

Risk Ref	2025-03
Risk Owner	Chief Executive
Risk Name	Local Government Reorganisation
Risk Description	The Council has to divert resources to the management of the Council's response plans for Local Government Reorganisation, which threatens the ability to maintain the quality of services at a time when capacity is already stretched.
Consequences	Core Services and major projects fail to be delivered Reputational damage
Corporate Objective SBC	Effective Council
Main Risk Category	Capacity/Service Delivery

Inherent Impact	**Inherent Likelihood**	**Inherent Risk Score**
4	4	16
Residual Impact	**Residual Likelihood**	**Residual Risk Score**
4	3	12
Target Score		8
Comment on Target Score: As planning for LGR is still in its infancy, it is too soon to be confident that we can mitigate this risk fully and reduce it to a 4. At present it is considered we can reduce the likelihood to a 2 giving a target score of 8. As planning and work progresses, actions and the target score will be reviewed. Progress with this risk is also linked to the risk regarding capacity (ref 2025-06).		

Actions

Actions Planned	Person Responsible	Timescale	Progress/Comments
Development of action plan for internal preparation, pending decision	Head of Business Support and Assurance	Q1 2026-27	Work plans are being developed, and these include preparatory work for LGR. At present, this primarily focuses on our workforce but as the external work progresses, this will inform our own work plans.

Progress Updates

Current Position	Work continues through the County wide project structure to prepare for LGR, pending a review of this following the Government’s decision to create two new unitary councils in Staffordshire. The Council has a representative on all 7 corporate workstreams and work has been focussed on collating baseline data. Our own work planning is also considering the internal preparatory work needed for LGR.

Risk Ref	2025-06
Risk Owner	Chief Executive
Risk Name	Corporate capacity is insufficient to maintain provision of core services and deliver major projects
Risk Description	The inability to recruit and retain staff particularly in statutory and other core areas threatens service delivery across the Council. This risk is exacerbated by other factors such as the number of high priority projects, large procurement exercises, demand for new software, competing priorities and Local Government Reorganisation.
Consequences	Projects are delayed or not implemented Operational services are delivered to a lower standard; backlogs arise or service not delivered at all Complaints/damage to reputation Wellbeing of staff who are under pressure to deliver
Corporate Objective SBC	Effective Council
Main Risk Category	Capacity/Service Delivery

Inherent Impact	**Inherent Likelihood**	**Inherent Risk Score**
4	4	16
Residual Impact	**Residual Likelihood**	**Residual Risk Score**
4	3	12
Target Score		12
Comment on Target Score: Due to the limited market in key professions such as Finance, Legal, Planning etc, the uncertainty created by Local Government Reorganisation and the volume of major projects in progress, it is considered that the residual risk score cannot be reduced further and actions planned are focussed on maintaining the current position.		

Actions

Actions Planned	**Person Responsible**	**Timescale**	**Progress/Comments**
Development of work plans for the next 2 years. This will allow us to assess capacity and pinch points and prioritise work accordingly.	Leadership Team	Quarter 1 2026-27	Each Head of Service has developed a summary work plan and a detailed delivery plan for their service area. These are currently being reviewed and will be finalised in Quarter 2.
Monitoring delivery of workplans	Leadership Team	From Quarter 2 2026-27 onwards	Progress monitoring template being developed

Monitoring capacity	Leadership Team	From Quarter 2 2026-27 onwards	A template to monitor vacancies is being developed, and current vacancies are being identified. Sickness reporting being updated
Management of expectations/discussion with Cabinet	Chief Executive/ Leadership Team	Q1 2026-27	Preliminary discussions with Cabinet Members are taking place before the work plans are finalised.

Progress Updates

Current Position	Capacity and workload continue to be an ongoing issue, and this is not expected to change, particularly with the additional work that LGR will bring in the coming months. The intention is to manage this through regular reviews of the workplans which set out the key projects for the next 2 years. As the work required for LGR becomes clearer, the workplans will be reviewed and it may be necessary to stop work on some projects. Leadership Team is continuing to focus on managing capacity within current resources and maintaining the current position so that this does not deteriorate.

Risk Score April 2025	Risk Score April 2026	Direction of Travel in the Year
12	12	↔

Comment on Direction of Travel in the Year	The status quo continues to be maintained, in line with the stated position for this risk.

Risk Ref	2025-09
Risk Owner	Operations
Risk Name	Safe Management of Trees
Risk Description	Risk of a tree or part of a tree falling on an individual/s causing death or serious injury. Risk of a tree or part of a tree falling onto a building causing severe damage to a property or the death or serious injury of an individual/s.
Consequences	• Death/Serious Injury • Damage to property • HSE Investigation/Prosecution • Corporate Manslaughter • Insurance Claims
Corporate Objective SBC	Climate Change, Nature Recovery and the Environment
Main Risk Category	Capacity/Service Delivery

Inherent Impact	**Inherent Likelihood**	**Inherent Risk Score**
4	4	16
Residual Impact	**Residual Likelihood**	**Residual Risk Score**
4	3	12
Target Score		8
Comment on Target Score: Given the number of trees and the unpredictability of the weather, and the increase in the number of severe weather events, it is considered the current residual likelihood score sits at a 3. With the residual impact score remaining at a 4, it makes the overall residual risk score a 12. It is unlikely that the impact score can be reduced below a 4. Due to its categorisation, the nature, and the subject area it may also be difficult to reduce the likelihood from a 3 to a 2. The residual risk score will remain high for some time at a 12 until re-inspections have been undertaken, and resultant work programmes are well established. Given the circumstances of the risk, while currently higher than preferred at 12, an overall goal of a residual risk score of an 8 is considered acceptable in the longer-term.		

Actions

Actions Planned	Person Responsible	Timescale	Progress/Comments
Review tree service, TPOs and procedures	Natural Environment Manager	Q3 2026-27	In progress - several requirements identified including tree team, full TPO review.
Joint Tree Team Structure to be developed and implemented	Natural Environment Manager	Q4 2026-27	Structure has been agreed and posts have gone to advert New Tree Team posts were advertised in Q1 2026-27, with interviews scheduled for early Q2 2026-27.

Actions Planned	Person Responsible	Timescale	Progress/Comments
Implement new full risk-based tree management procedure	Natural Environment Manager	Q3 2026-27	In progress, a new tree risk management strategy has been drafted.
Implement new joint tree management ICT GIS based system	Natural Environment Manager	Q3 2026-27	Data cleansing and preparation in progress; this will take several months. Priority to be given to uploading tree data so that inspection work for red zones can be commissioned
Outsource next round of tree inspections for all trees to create new baseline data (78,000 trees) and ongoing inspections	Natural Environment Manager	Q4 2026-27	Trees in red zones are being prioritised. Data for inspections being collated and procurement options being considered
Deliver and monitor tree risk-based works and ongoing inspections	Natural Environment Manager	Ongoing	Progress against Tree Management action plan being monitored and reported to Trees Management Board

Progress Updates

<table>
<tr><td>Current Position</td><td>Consultant tree officers continue to be used to cover vacant posts until permanent staff can be recruited and a large amount of tree maintenance works are being contracted out. Recruitment to the above posts has begun, with interviews scheduled for early Q2.

The limited capacity currently available within the team is being prioritised and focused on responsive inspections and tree works, while recruitment takes place and alternative arrangements are sought, where available.

Notwithstanding this, good progress continues to be made to deliver the planned actions to improve the service.

Work is in progress to catalogue SBC’s area and other Tree Protection Orders for integration into the Council’s new ICT tree system. Two officers continue to support the implementation of the new tree management system to allow for the input of tree data which can then be used to inform tree inspection works.

Work has commenced on the preparing for the procurement of a contractor to undertake inspections of trees in red zones as a priority, with inspections of other areas to follow.

Due to the nature of the risk, it is considered the overall residual likelihood score will not be reduced until the full tree inspection survey has been completed and the majority of the high-risk remedial tree works identified from this has been carried out. This may take upward of 2-3 years.</td></tr>
</table>

Risk Ref	2025-16
Risk Owner	Head of Economic Development and Planning
Risk Name	Delivery of Town Centre Regeneration Project
Risk Description	There is a risk that the high-profile large regeneration projects may not deliver as anticipated, to time or to budget, leading to reputational risks to the Council and creating financial risks that impact on the Council's financial position and could impact on service delivery and hinder the Council's wider ambition to secure economic prosperity for the District. There is a risk that either the Council may not be able to complete the demolition phase of the project or secure a development partner to re-develop the cleared sites.
Consequences	• Major reputational risk for the Council in terms of not delivering the schemes that local residents expect; potential that Council may be unsuccessful with future funding bids • Reduced growth and economic prosperity for local residents • Decline of town centres/impact on major redevelopment proposals • Council exposed to unplanned financial risks and pressure on revenue resources which impacts on delivery of core services • Increased pressure on already stretched services/functions of the council which have capacity issues. • Cleared sites could sit empty for indeterminate period if developer interest doesn't materialise
Corporate Objective SBC	Prosperous Economy
Main Risk Category	Reputation, Customer/Public Perception

Inherent Impact	**Inherent Likelihood**	**Inherent Risk Score**
4	4	16
Residual Impact	**Residual Likelihood**	**Residual Risk Score**
4	3	12
	Target Score	8

Comment on Target Score:
Inherent nature of the risk profile of the regeneration schemes makes it difficult to reach a score of 4, therefore a target score of 8 has been set at this stage. External influences may affect the ability to secure operators/end users to build out development within the agreed footprint of the scheme. Although the main demolition works to the former Guildhall Shopping Centre and co-op have completed and there has been a strong level of interest in the town centre from potential operators, the residual risk score will remain at 12 until the Council completes the demolition works to the former Wilko site and properties at 10 - 12 Gaolgate Street and secures agreements with developers/operators following a competitive procurement process.
It should be noted that the risk profile of the scheme will change over time as the Council secures development partners/operators to bring forward development on the cleared sites.

Actions

Actions Planned	Person Responsible	Timescale	Progress/Comments
Approval of Development Framework to set out Council's vision for the regeneration opportunity and proposed uses/parameters for development	Head of Economic Development and Planning	Q1 2026-27	Presented to Cabinet for approval on 9 April 2026 Action Complete
Approval of refreshed Governance structure for the project and additional resource/capacity to deliver the project	Deputy Chief Executive - Place Deputy Chief Executive - Resources (S151) Head of Economic Development and Planning	Q2 2026-27	Report being prepared and will be presented to Cabinet for consideration in Quarter 2, which is later than the original timescale of Q1. Further work has been undertaken with statutory officers to ensure that the refreshed structure is robust and reflects the scope of the programme going forward.
Communications to stakeholders, partners and the public - development of Comms Strategy and Plan	Head of Economic Development and Planning, Communications Manager	Q2 2026-27	Initial public engagement plan for the Town Centre Development Framework has been developed. In July/August 2026, it is planned to run drop in events for the public and business community. Furthermore, displays and hoardings surrounding the site will provide further information on the Council's plans and next steps.
Agree approach to securing development delivery	Head of Economic Development and Planning	Q1 2026-27	A Development Framework has been produced and was approved by Cabinet on 9 April 2026. The Development Framework sets out an approach to secure development delivery within each identified plot. Detailed work will now be undertaken to progress the identified sites (see next action). Action completed

Actions Planned	Person Responsible	Timescale	Progress/Comments
Formal procurement process to appoint development partner(s) for residential parcels.	Head of Economic Development and Planning	Q3 - 2026-27 (revised from Q1 June 26)	Officers have completed work to research procurement frameworks and other routes to market that could be used to select developers/operators. Officers are currently preparing a paper setting out a recommended approach to securing developers/operators to build out the 3 residential plots identified in the Framework with the target to commence a process in Q3.
Business cases for the Market Hall proposal and College expansion on the former Wilko site	Head of Economic Development and Planning	Q3 2026-27	Officers have commissioned a markets specialist to prepare a feasibility study on the potential for a new Market Hall development. Officers continue to progress discussions with NSCG regarding the potential expansion of the College.

Progress Updates

Current Position	Whilst the Council has made positive progress with the regeneration scheme during 2025/26, the risk profile and score remains at the same level until the Council moves forward with the recommended development delivery route and secures developers/operators to deliver the regeneration opportunity Performance Dashboards and Risk Registers have been produced and reported to Project Boards and LT. Meetings with developers/operators are being organised to discuss the regeneration opportunity being created by the Council utilising the Future High Street Fund (FHSF) grant. A Development Framework was approved by Cabinet on 9 April 2026, which sets out the Council's vision for the regeneration scheme and proposed uses for the 6 development parcels identified within the red line boundary. Officers are finalising a refreshed governance structure for the project and progressing detailed business cases and technical work to inform delivery of the development plots identified in the Framework.

Agenda Item 4(a)iii

Quarter 1 Performance Report for 2026-27

Committee:	Cabinet
Date of Meeting:	17 September 2026
Report of:	Head of Business Support and Assurance
Portfolio:	Resources Portfolio

1 Purpose of Report

1.1 To advise Members on the progress in delivering the Council's priorities and performance at the end of the quarter 1 for 2026-27.

2 Recommendations

2.1 To note the progress made during quarter 1 in the delivery of the Council's priorities and performance as set out in **APPENDICES 1 AND 2**.

Reasons for Recommendations

2.2 The performance information allows Cabinet to monitor progress in delivery of the Council's corporate priorities and operational services.

3 Key Issues

3.1 The Corporate Business Plan 2025-28 sets out the Council's priorities and strategic objectives. The plan is supported by Priority Delivery Plans (PDPs) which set out the key projects and actions for delivery each year.

3.2 Overall, 80% of the key actions scheduled for quarter 1 have been delivered or are on schedule to be completed. Progress in delivering the PDPs is summarised in section 5 of the report and set out in detail in **APPENDICES 1A TO 1D**.

3.3 With regard to the operational performance of the key services of the Council, 92% of targets have been met or exceeded. Further details can be found at 5.6 and in **APPENDIX 2**.

4 Relationship to Corporate Priorities

4.1 The indicators and actions contribute individually to all of the Council's priorities.

5 Report Detail

5.1 The Corporate Business Plan 2025-28 sets out the Council's priorities and strategic objectives. There are four overarching priorities which focus on:

- the economy of the Borough;
- the health and wellbeing of residents;
- climate change and our environment; and
- being an effective Council.

5.2 The priorities are supported by a number of objectives that set out what the Council is aiming to achieve, how we will deliver these and how we will measure our performance.

Priority Delivery Plans

5.3 The Priority Delivery Plans (PDPs) set out in **APPENDICES 1A TO 1D** to this report are the annual documents that set out how the Council will achieve progress against its strategic objectives; these plans establish the actions and timetable for delivery that are the basis of the Council's performance reporting framework.

5.4 A commentary on performance and a rating for each of the actions set out in the Delivery Plans is given in **APPENDICES 1A TO 1D**. A summary of progress, by rating, is given in table 1 below.

Table 1: Summary of progress in delivery of key projects for Quarter 1 2026-27

Performance Rating	**Action Completed**	**Work in progress but behind schedule**	**Work due but not started**	**Actions due to end of Quarter 1**
Priority				
Prosperous Economy	2			**2**
Communities and Wellbeing	3		1	**4**
Climate Change and Environment	3			**3**
Effective Council		1		**1**
Total	**8**	**1**	**1**	**10**

5.5 At the end of quarter 1, of the 10 projects/actions due for delivery in this period:

- 80% have been completed; and
- 10% are behind target;
- 10% are not being proceeded with.

Key Performance Indicators

5.6 In addition to the Priority Delivery Plans, performance is also reported against the delivery of key operational services; Key Performance Indicators (KPIs) for these services are set out in **APPENDIX 2**. In summary:

Table 2 - Summary of key performance indicators for Quarter 1 2026-27

Priority	✓ Performance on target or exceeded	▲ Performance < 5% below target	✗ Performance > 5% below target	Total Number of KPIs
Prosperous Economy	4			**4**
Communities and Wellbeing	1	1		**2**
Climate Change and Environment	10		1	**11**
Effective Council	7			**7**
Total	**22**	**1**	**1**	**24**

5.7 Of the 24 indicators due to be reported on in quarter 1:

- 92% show performance on or above target; and
- 8% show performance below target.

6 Implications

6.1 Financial

There are no direct financial implications arising from the report. The financial management of the PDPs is standard in accordance with Financial Regulations and any measure to address a performance shortfall as reflected in a PDP report will require compensatory savings to be identified in the current year and be referred to the budget process for additional resources in future years.

6.2 Legal

None

6.3 Human Resources

None

6.4 Risk Management

The Council's Strategic Risk Register sets out the risks the Council faces in delivering its priorities.

6.5 Equalities and Diversity

Equality and diversity matters are addressed in individual services areas and by undertaking equality impact assessments for projects and programmes of work where this is necessary and appropriate.

6.6 Health

None

6.7 Climate Change

None

7 Appendices

Appendix 1A: The Economy
Appendix 1B: Community
Appendix 1C: Climate Change
Appendix 1D: The Council
Appendix 2: Key Performance Indicators

8 Previous Consideration

None

9 Background Papers

Corporate Plan 2025-28

Contact Officer:	Judith Aupers
Telephone Number:	01543 46411
Ward Interest:	N/A
Report Track:	Cabinet - 17 September 2026 Resources Scrutiny Committee - 22 September 2026 Economic Development and Planning Scrutiny - 6 October 2026 Community Wellbeing Scrutiny Committee - 23 September 2026
Key Decision:	No

Priority Delivery Plan for 2026-27

Priority 1 - Prosperous Economy

Summary of Progress as at end of Quarter 1

✓	△	✗	**N/A**	**Total Number of Projects/Actions Due**
Work completed	Work in progress but behind schedule	Work not yet started	Action not yet due	
2				2

Summary of Successes as at Quarter 1
• Approval of Stafford Town Centre Development Framework • New Local Plan timetable published in line with Government regulations

Summary of Slippage as at Quarter 1
None

Priority 1 - Prosperous Economy

Project	Actions and Milestones	Q1	Q2	Q3	Q4	Progress Update	Symbol
Delivery of regeneration schemes	**Stafford Town Centre Transformation**						
	• Progress delivery of Development Framework, identifying process for preferred development delivery option for cleared development sites	**X**				The Stafford Town Centre Development Framework and process for development partner selection was approved by Cabinet on 9 April. A further Cabinet report will set out the revised governance framework for the programme's delivery phase.	✓
	• Develop wider masterplan/development framework for Stafford town centre		X				
	Stafford Station Gateway						
	• Complete land acquisition			X			
	• Commence delivery of Local Regeneration Fund activities				X		
	• Agree preferred development delivery option for cleared development sites				X		
Launch of new Business	• Implement new programme of targeted business support		X				

Project	Actions and Milestones	Q1	Q2	Q3	Q4	Progress Update	Symbol
Support programme							
Economic Growth Strategy	• Refresh Economic Growth Strategy			X			
Pipeline of projects	• Develop pipeline of future economic development and regeneration projects			X			
Delivery of planning services to enable economic growth	• Publish revised Local Development Scheme	X				New Local Plan timetable published 3 June 2026	✓
	• Prepare New Local Plan and updated evidence base				X		
	• Launch of Proposed Local Plan content and evidence (Regulation 23) consultation				X		
	• Complete implementation of improvement plan for Development Management			X			

Priority Delivery Plan for 2026-27

Priority 2 - Communities and Wellbeing

Summary of Progress as at end of Quarter 1

✓	△	✗	**N/A**	**Total Number of Projects/Actions**
Work completed	Work in progress but behind schedule	Work not yet started	Action not yet due	
3		1		4

Summary of Successes as at Quarter 1
The first unit of temporary accommodation has been bought by the Council and, a contract has been signed to convert office accommodation into a further 6 units of temporary accommodation, both with a view to reducing reliance on Bed and Breakfast accommodation for households who present to the Council as homeless.

Summary of Slippage as at Quarter 1
The housing strategy has been put on hold due to the new duty to produce a supported housing strategy by 31 March 2027.

Priority 2 - Communities and Wellbeing

Project	Actions and Milestones	Q1	Q2	Q3	Q4	Progress Update	Symbol
Delivery of council owned temporary accommodation	Acquire first unit of temporary accommodation	X				Property purchased and contract awarded for refurbishments.	✓
	Procure works to first unit and project manage refurbishment		X				
	Hand over property to Housing Options			X			
	Enter into contract for conversion of town centre units to temporary accommodation	X				Contract awarded completed.	✓
	Start works on site			X			
	Complete works on site and hand over to Housing Options				X		
	Purchase 3 properties using local authority housing grant funding				X		
Strategic Housing and Homelessness	Award contract for Housing Strategy	X				It is not a statutory requirement to have a housing strategy. Due to the new additional duty of producing a supported housing strategy, resource has been shifted into completing this by the Government deadline of 31 March 2027. If the Housing Strategy and Research Officer post is filled, this can be picked up later in the year.	✗

Project	Actions and Milestones	Q1	Q2	Q3	Q4	Progress Update	Symbol
	Award contract for Supported Housing Strategy Needs Assessment		X				
	Complete Supported Housing Strategy Needs Assessment and start Supported Housing Strategy				X		
Leisure, Culture and Heritage Provision	Review of Stafford's leisure, culture and heritage provision	X				An options appraisal has been commissioned, and work has progressed throughout quarter 1, scoping the options for the delivery of leisure, culture and heritage in Stafford Borough.	✓
	Decision on scope of Stafford's future commissioned service in context of end of initial 10-year term in November 2027		X				
Community Wellbeing	Complete Community Wellbeing Strategy, setting out priorities across community safety and health (2025-2028)			X			
	Agree a delivery plan for the Community Wellbeing Strategy			X			
	Complete the actions in the delivery plan and evaluate impact on Community Wellbeing				X		
	Evaluate the impact of the small grant scheme on an annual basis				X		

Priority Delivery Plan for 2026-27

Priority 3 - Climate Change, Nature Recovery and the Environment

Summary of Progress as at end of Quarter 1

✓	△	✗	**N/A**	**Total Number of Projects/Actions**
Work completed	Work in progress but behind schedule	Work not yet started	Action not yet due	
3				3

Summary of Successes as at Quarter 1
New mandatory weekly food waste collection service began on schedule in April 2026 and is performing well. New Tree Team posts roles have been advertised locally and across the industry. Procurement process for Rowley Park/Play Area improvements has been completed with formal award expected in Q2.

Summary of Slippage as at Quarter 1
None

Project	Actions and Milestones	Q1	Q2	Q3	Q4	Progress Update	Symbol
Delivery of Climate Change Action Plan	Review delivery against Action Plan and report to Climate Action Board					Progress reports will be provided to the Board quarterly and the Cabinet every six months	N/A
Local Plan with positive climate change policies	Climate Change Adaptation and Mitigation study			X			
	Proposed Local Plan content and evidence (Regulation 23) consultation includes draft climate change and renewable policies				X		
Nature Recovery	Delivery of the nature recovery action plan				X		
Introduce weekly kerbside food waste collections	Introduce new weekly food waste collections from April 2026	X				Successful introduction of new weekly food waste collections across the borough during April 2026 with higher-than-expected yield.	✓
Tree Management	**Recruitment**						
	• Commence recruitment of Tree Management and Maintenance Teams	X				All 5 officer posts across both Councils were put to the market in early June 26, along with 2 Senior Arboriculturist posts	✓
	• Interview and recruit successful candidates into teams		X				
	Tree Inspections						
	• Begin procurement for inspection of trees in red zones		X				

Project	Actions and Milestones	Q1	Q2	Q3	Q4	Progress Update	Symbol
	• Inspections of Red Zone Trees			X			
	Go-live / Introduction of joint tree management system		X				
Investment in Parks, Play Areas and Open Spaces	**Rowley Park play area phase one re-development**						
	• Procurement for development works contractor complete	X				Procurement process complete and expecting to award the contract in Q2	✓
	• Contract for development works awarded		X				
	• Development works commence on site			X			
	• Development works complete				X		
	Re-development of four identified play areas						
	• Begin public consultation on re-development of the four play areas		X				
	• Complete public consultation and begin procurement for contractor to complete the re-development works			X			
	• Complete procurement and award the works to the contractor				X		

Priority Delivery Plan for 2026-27

Priority 4 - Effective Council

Summary of Progress as at end of Quarter 1

			N/A	**Total Number of Projects/Actions**
Work completed	Work in progress but behind schedule	Work not yet started	Action not yet due	
	1			1

Summary of Successes as at Quarter 1
N/A

Summary of Slippage as at Quarter 1
A work programme to provide more services on line and improve accessibility is being developed, but is behind schedule. It is anticipated that this will now be completed in quarter 2.

Priority 4 - Effective Council

Project	Actions and Milestones	Q1	Q2	Q3	Q4	Progress Update	Symbol
Provide more services online and improve accessibility	Work with services to produce a work programme	X				Meetings have taken place with service managers and a work programme is being developed	
	Delivery of the work programme (key actions will be added once the plan has been developed and approved)		X				
Consultation	Develop a work plan for consultation/engagement with the public and stakeholders on key projects that affect our communities eg the production of the local plan.		X				
Local Government Reorganisation	Develop an action plan to respond to the Government's Proposals for Local Government Reorganisation.		X				
	Delivery of the action plan (key actions will be added once the plan has been developed and approved)			X	X		

KPIs for Priority 1 - Prosperous Economy

Symbol	Description	Qtr 1	Qtr 2	Qtr 3	Qtr 4	End of Year
	Performance on or exceeds target	4				
	Performance < 5% below target					
	Performance > 5% below target					
	TOTAL KPIs DUE TO BE REPORTED	**4**				

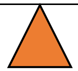
Priority 1 - Prosperous Economy

Indicator	Year End 25/26	Target 26/27	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Year End 26/27	Rating Symbol	Comments
Regeneration									
Employment rate (% relates to working age population (16-64) economically active i.e. in work or training)		80%					N/A	N/A	Annual figure released by ONS. Next data release from ONS 21 July 2026, therefore the 25/26 year-end figure will be reported in Q2.
Number of housing completions	612	749						N/A	Data not available until June 2026 Annual figure at year end (1 April 25 to 31 March 26)
Planning Services									
Major Planning Applications determined within time	66.5%	60%	100%					✓	10/10
Non-major Planning Applications determined within time	67.35	70%	90%					✓	117/130
Major Planning Applications overturned at appeals as percentage of no. applications determined	1.94%	< 10%	0%					✓	

Appendix 2

Indicator	Year End 25/26	Target 26/27	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Year End 26/27	Rating Symbol	Comments
Non-major Planning Applications overturned at appeals as percentage of no. applications determined	66.5%	< 10%	3.85%					✓	

KPIs for Priority 2 - Communities and Wellbeing

Symbol	Description	Qtr 1	Qtr 2	Qtr 3	Qtr 4	End of Year
	Performance on or exceeds target	1				
	Performance < 5% below target	1				
	Performance > 5% below target					
	TOTAL KPIs DUE TO BE REPORTED	2				

Priority 2 - Communities and Wellbeing

Indicator	Year End 25/26	Target 26/27	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Year End 26/27	Rating Symbol	Comments
Strategic Housing, Homelessness and Assistance									
% households had a positive outcome and secured accommodation for 6 + months	49%	43%	60%					✓	
Delivery of affordable housing per year working with Registered Providers, Developers and Homes England (Annual)	83 homes	210 homes						Annual	
No of Disabled Facilities Grants (DFGs) completed	184	125	22					▲	The annual target is not profiled evenly across the year. It is typical in grant delivery for peak completion volumes to occur in Q3 and Q4, with a lower outturn in Q1 and Q2. The service is slightly behind the expected volume of 24 completions in Q1.
Annual report on delivery of the Disabled Facilities Grants service	N/A							Annual	Presentation to Community Wellbeing Scrutiny
Leisure, Culture & Heritage									
Annual Report from Freedom Leisure setting out the performance of all	N/A							Annual	Presentation to Community Wellbeing Scrutiny

Indicator	Year End 25/26	Target 26/27	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Year End 26/27	Rating Symbol	Comments
facilities and the wider wellbeing work and events they facilitate.									
Health and Wellbeing									
Total value of financial outcomes achieved as a result of the Citizen's Advice contract	£3,491,331	N/A Measure only	Pending information from Citizen's Advice					N/A	Contextual information only

KPIs for Priority 3 - Climate Change, Nature Recovery and the Environment

Symbol	Description	Qtr 1	Qtr 2	Qtr 3	Qtr 4	End of Year
✓	Performance on or exceeds target	10				
▲	Performance < 5% below target					
✗	Performance > 5% below target	1				
	TOTAL KPIs DUE TO BE REPORTED	11				

Priority 3 - Climate Change, Nature Recovery and the Environment

Indicator	Year End 25/26	Target 26/27	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Year End 26/27	Rating Symbol	Comments
Climate Change									
Advice and support on energy efficiency and sustainability provided to businesses	0	100	26					✓	
Advice and support on sustainability/community energy projects with communities	0	20	6					✓	
Engagement with education establishments on sustainable education	0	60	60					✓	
Energy Advice Service to residents (numbers engaged)	100	100	39					✓	
Waste and Recycling									
% collections completed first time	99.95%	99.90%	99.98%					✓	Q1 % is above target showing continued high performance considering the introduction of weekly food waste collections during Q1.

Indicator	**Year End 25/26**	**Target 26/27**	**Qtr 1**	**Qtr 2**	**Qtr 3**	**Qtr 4**	**Year End 26/27**	**Rating Symbol**	**Comments**
Number of missed bin collections (including assisted)/100,000/qtr.	51 per 100,000	<40 per 100,000	51 per 100,000					✗	Q1 figure is above target as it does not include food waste collections which are yet to be factored in and sits at the same level as the 25/26-yearend figure.
% Household waste sent for re-use, recycling and composting	44.94%	48%	48.49%					✓	Q1 % has exceeded the 26/27 target following the introduction of food waste collections.
Amount of household residual waste collected per household (Kgs)	424.04 kgs	<448 kgs or 112 kgs / qtr.	107.61 kgs					✓	Kg's collected within target. Lower residual waste collected due to introduction of food waste collections.
Amount of food waste collected (tons)	N/A	NEW	961 tonnes					N/A	Target to be determined during first year of introduction.
Streetscene									
Land Audit Management System (LAMS) satisfaction grading for cleansing*	N/A	80%	92%					✓	

Indicator	**Year End 25/26**	**Target 26/27**	**Qtr 1**	**Qtr 2**	**Qtr 3**	**Qtr 4**	**Year End 26/27**	**Rating Symbol**	**Comments**
LAMS satisfaction grading for Grounds Maintenance*	N/A	80%	87%					✓	
LAMS satisfaction grading for Cleansing and Grounds Maintenance in Parks*	N/A	80%	90%					✓	

*The measure for satisfaction has been changed to use Land Audit Management System (LAMS) grading. This has been developed by the Association for Public Service Excellence (APSE) and uses set criteria to grade Cleansing and Grounds Maintenance standards. This approach is used by other Local Authorities and the grading feeds into national benchmarking data

KPIs for Priority 4 - Effective Council

Symbol	Description	Qtr 1	Qtr 2	Qtr 3	Qtr 4	End of Year
✓	Performance on or exceeds target	7				
▲	Performance < 5% below target					
✗	Performance > 5% below target					
N/A	Reported Annually / Not Applicable					
	TOTAL	**7**				

Priority 4: Effective Council

Indicator	Year End 25/26	Target 26/27	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Year End 26/27	Rating Symbol	Comments
Good Customer Experience									
Days taken to process new Housing Benefit and Council Tax Claims	17.1	**20 days**	6.8					✓	
Days taken to process new Housing Benefit and Council Tax change of circumstances	2.7	**9 days**	7.2					✓	
% of calls answered	96.2%	**95%**	95.2%					✓	
Number of calls answered	63,849		18,162					N/A	This is not a measure but gives context to the performance in call handling
Average call wait time	58 seconds	**90 seconds**	73 seconds					✓	
Number of services (forms) available online	85	**N/A**	137					N/A	
Number of online transactions	80,952	**N/A**	23,535					N/A	

Appendix 2

Indicator	Year End 25/26	Target 26/27	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Year End 26/27	Rating Symbol	Comments
Funding Council Services									
% of Council Tax collected annually	97.5%	**98%** at end of year	28.5					✓	
% National non-domestic rates (NNDR) collected	97.6%	**98% at end of year**	30.3					✓	
Good Governance									
Freedom Of Information requests within time i.e. 20 working days	88.4%	**85%**	90%					✓	
Number of public consultations/engagement exercises undertaken		New						Annual	

Agenda Item 4(a)iv

Revenues and Benefits Collection Report - Quarter 1

Committee:	Cabinet
Date of Meeting:	17 September 2026
Report of:	Deputy Chief Executive - Resources
Portfolio:	Resources Portfolio

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1 Purpose of Report

1.1 To inform Cabinet of the performance of the Revenues and Benefits Service as regards:

- The collection of Council Tax during the first quarter of the 2026-2027 financial year.
- The collection of Business Rates during the first quarter of the 2026-2027 financial year.
- The recovery of overpaid Housing Benefit during the first quarter of the 2026-2027 financial year.

1.2 To seek approval to the write off of the arrears listed in the **CONFIDENTIAL APPENDIX.**

2 Reason(s) for Report being 'Not for Publication'

2.1 In accordance with the provisions of Schedule 12A of the Local Government Act 1972 (as amended), the report is considered 'not for publication' under the following categories of exemption:

- Exempt Paragraph 1 - Information relating to any individual.
- Exempt Paragraph 2 - Information which is likely to reveal the identity of an individual.
- Exempt Paragraph 3 - Information relating to the financial or business affairs of any particular person (including the Council).

3 Recommendations

3.1 That the information regarding collections be noted.

3.2 That the arrears listed in the **CONFIDENTIAL APPENDICES** be written off.

Reasons for Recommendations

3.3 Efficient collection of the Council's revenues is of major importance to the funding of Council services and those provided by our preceptors.

3.4 Whilst our collection rates are traditionally good, regrettably not all of the monies owed to the Council can be collected and this report contains a recommendation to write off bad debts which cannot be recovered.

4 Key Issues

4.1 Council Tax due for the 2026/2027 year amounts to £117.1M of which some **28.5%** was collected up to the end of June 2026.

4.2 Business Rates due for the 2026/2027 year amounts to £60.4M of which some **30.3%** was collected up to the end of June 2026.

5 Relationship to Corporate Priorities

5.1 Not Applicable.

6 Report Detail

Council Tax

6.1 Council Tax is collected on behalf of the Borough Council, Parish Councils and our Major Preceptors (Staffordshire County Council and Commissioner for Police, Crime, Fire and Rescue). The effect of the Collection fund arrangements means that Stafford Borough Council retains around 10% of the council tax collected.

6.2 Council Tax due for the current year amounted to £117.1M and we have collected 28.5% of this up to the end of June 2026. The collection rate for the same period last year was 28.6%.

6.3 The team also increased its efforts to collect older council tax debts due to the Council and this may impact some residents' ability to pay current charges. In the first three months of this financial year, prior year arrears have reduced by £662K, which will have affected some residents' ability to pay the current bill on time.

6.4 In accordance with the Council's approved policies, all reasonable and lawful attempts are made to recover all amounts due. In the first instance this involves the issue of bills, reminders and final notices, followed by Summonses in the Magistrates Court where the warning notices are not effective. At all stages of this process, debtors are encouraged to engage in voluntary arrangements to repay their arrears, to prevent the need for formal action.

Where necessary and when Liability Orders are granted by Magistrates, the Council uses its powers to make deductions from earnings and benefits of debtors, where it can, and instructs Enforcement Agents where such deductions are not possible or appropriate.

In the most severe cases and for debts exceeding £5,000, the Council will consider personal bankruptcy action against individuals.

6.5 The recovery powers available to the Council are considerable but not completely infallible. There are occasions when bills are not paid and the debts cannot be recovered.

6.6 Statutory safeguards such as Debt Relief Orders, Individual's Voluntary Arrangements exist to protect debtors suffering hardship, to attempt to the expensive, stressful and sometimes ineffective process of personal bankruptcy. Where a debt is included in such an instrument, or when a debtor is bankrupt, our ordinary recovery powers cannot be used.

6.7 For any of our powers to be effective we need to know the whereabouts of a debtor, and this is not always the case. Where debtors abscond, we will use all reasonable endeavours to trace them and are often successful in doing so. Unfortunately, on occasions this is not so and we must submit a debt for write off.

Our trace procedures include:

- Checking our internal Council systems and following any information which may help us to trace the debtor.
- Use of credit reference agency data.
- Trace and collect facilities offered by our Enforcement Agencies
- Visits to the last known address by the Council's Property Inspector and use of external tracing agents.

Unfortunately, legislation does not currently permit access to DWP or HMRC records to trace Council Tax debtors or their employers, though a Cabinet Office project is currently reviewing this.

Data protection legislation allows us to receive information as to a debtor's whereabouts, but we cannot disclose information to other creditors.

Reciprocal arrangements with utility companies and similar are not therefore workable.

Business Rates

6.8 Business Rates due for the current year amounts to £60.4M of which **30.3%** was collected up to the end of June 2026. This is a small increase on last year's collection 28.9%.

6.9 This is a particularly pleasing start to the year. Changes to the way that business rates are calculated this year mean that many retail, hospitality and leisure establishments faced increased bills, as the former 40% rate relief was removed.

6.10 The recovery powers available to us are again contained in the Council's approved policies and are used in full. Those powers and our procedures are similar to the council tax powers described above, with the exception that deductions from individuals' benefits and earnings are not permissible, even if the debtor is an individual.

6.11 Where rates are owed by an individual, similar safeguards exist for the debtors and trace facilities are used by the Council for absconding debtors, as described above.

6.12 Additionally, in the case of business rates, as has been reported to Cabinet previously, our collection efforts are sometimes frustrated by weaknesses in legislation. Rates are due from the occupiers rather than the owners of property and where the occupier is a company, we can only recover from that company. Some proprietors will strip a company of its assets or dissolve the company before we have had an opportunity to implement our recovery procedures. A new company is then formed in a similar style, to trade from the same premises.

Central Government has previously undertaken to review the loopholes that exist in rating and company legislation, though no changes have yet been received. Officers continue to actively monitor these issues.

6.13 1 irrecoverable Business Rate debt in the sum of £14,640.46 is listed in the **CONFIDENTIAL APPENDIX** to this report.

Housing Benefit Overpayments

6.14 The Council manages the Housing Benefit scheme on behalf of the Department for Work and Pensions, who fund the cost of benefits paid to claimants.

6.15 Sometimes a claimant will be paid too much Housing Benefit, for example when the Council does not become aware of a change of circumstances until after the claimant has been paid the benefit. This is called an Overpayment of Housing Benefit. The Council is expected to recover these overpayments from the claimant in all but a few limited circumstances. DWP will fund only 40% of benefit which is overpaid as a result of claimant error or fraud.

6.16 Where an overpayment occurs as a result of a local authority error, DWP will provide 100% funding provided our error rate remains below a threshold of 0.48% of benefit paid, as it has routinely done for many years.

6.17 Recovery of overpaid Housing Benefit continues to progress well, with some £97.3K being collected up to the end of June 2026. This income is received into the General Fund, in addition to the Government subsidy and is not shared with preceptors.

7 Implications

7.1 Financial

Council Tax write offs are losses to the Collection Fund and, as such, form part of the cost of collection incurred by this Council.

The amounts being recommended are well below the value of the bad debt provision, which the Council includes within its accounts in expectation that some amounts owed will not be paid and cannot be recovered.

The cost of collecting the debts has been considered as part of the decision to put them forward for write off. If further information does come forward about the whereabouts of any of the individual debtors the Council will pursue recovery action.

Cabinet are asked to write off the debts as they are considered to be irrecoverable for the reasons given in the appendices. The debts remain legally due to the Council and should the circumstances causing the write off in any particular case, subsequently change, recovery action may be recommenced.

7.2 Legal

Cabinet are asked to write off the debts as they are considered to be irrecoverable for the reasons given in the appendices. The debts remain legally due to the Council and should the circumstances causing the write off in any particular case, subsequently change, recovery action may be recommenced.

7.3 Human Resources

None

7.4 Risk Management

None

7.5 Equalities and Diversity

None

7.6 Health

None

6.7 Climate Change

None

8 Appendices

Appendix 1: Business Rates to be considered for Write Off

9 Previous Consideration

None

10 Background Papers

None

Contact Officer:	Rob Wolfe
Telephone Number:	01543 464 397
Ward Interest:	None
Report Track:	Cabinet 17 September 2026 (Only)
Key Decision:	No

Agenda Item 4(b)i

Permission to Spend Local Authority Housing Fund 4

Committee: Cabinet

Date of Meeting: 17 September 2026

Report of: Head of Wellbeing

Portfolio: Community Portfolio

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1 Purpose of Report

1.1 To request permission to spend the Local Authority Housing Fund 4 (LAHF 4) capital allocation that has been awarded to Stafford Borough Council from central government at a value of £351,300.

1.2 To request additional funding of £323,700 for the purchase of temporary accommodation.

2 Recommendations

2.1 To note the content of this report.

2.2 That Cabinet give permission to spend the LAHF 4 grant. This is to contribute to the purchase of two units of temporary accommodation and one unit of resettlement housing. Additional top-up funds are requested for the purchase (and any associated refurbishment costs) of these three properties in pursuance of the LAHF 4 funding.

2.3 That Council incorporate the total funding amount of £675,000 into the capital programme for 2026/27.

Reasons for Recommendations

2.4 Increase in demand for temporary accommodation has resulted in use of bed and breakfast accommodation which is costly to the local authority and not a sustainable option for temporary accommodation.

2.5 Stafford Borough Council is in the process of refurbishing units for council-owned temporary accommodation and has been successful in obtaining LAHF 4 funding for 3 additional units.

2.6 If we do not take steps to expand our stock of temporary accommodation, we risk not being able to fulfil our statutory duties to provide suitable temporary accommodation to eligible homeless households.

3 Key Issues

3.1 The Council has a statutory duty to provide suitable temporary accommodation to eligible households. The support needs of households accessing the housing options service has increased in recent years which has made it increasingly challenging to both source and sustain temporary accommodation - with households staying in placements for longer and requiring higher levels of support. When our leased accommodation units are occupied, the Council relies on bed and breakfast which is costly to the local authority and in some instances may not be sustainable for vulnerable households.

3.2 An independent review of temporary accommodation outlined that council-owned temporary accommodation was the most cost-efficient model. Refurbishments have started for six single units of temporary accommodation alongside a two-bedroom house that has been purchased by Stafford Borough Council. The Council have been successful in obtaining grant funding to part fund the purchase of additional units.

3.3 Owning temporary accommodation will require property management, including repairs, maintenance and compliance, alongside rent collection, neighbourhood management and floating support for residents. A temporary accommodation policy is being drafted and a paper on the management of the accommodation, including rents and service charges will be bought to Cabinet for a decision once we have further details of the properties we are looking to purchase.

4 Relationship to Corporate Priorities

4.1 Stafford Borough Council has a statutory duty to provide services to those experiencing homelessness which contributes to Corporate Priority 2 Health and Wellbeing *‘To encourage and support residents to lead healthy and independent lives*.’

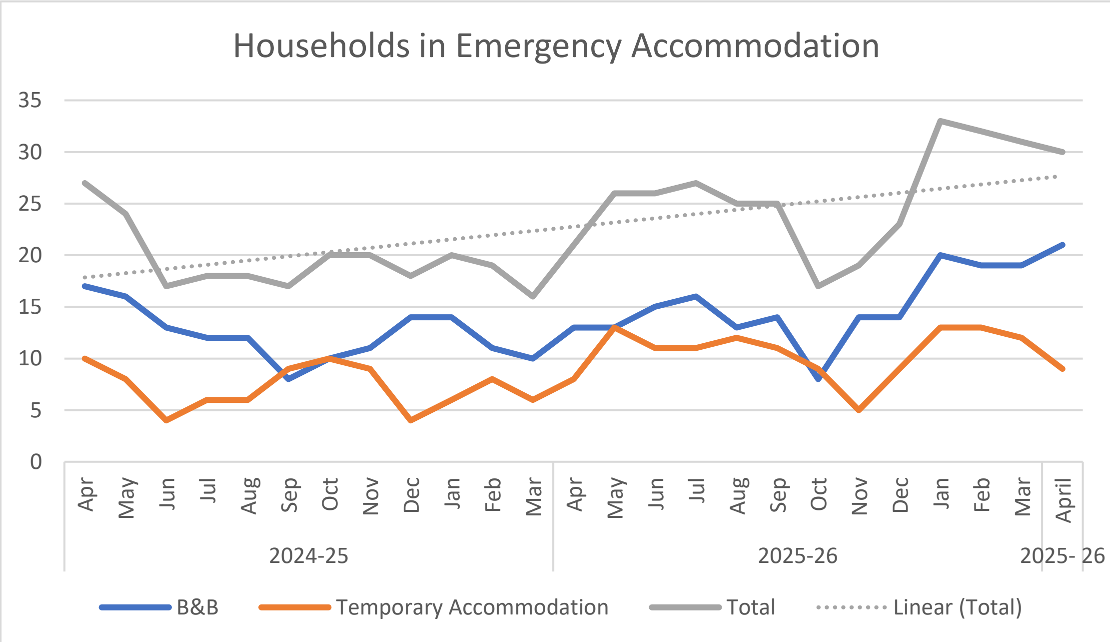
5 Report Detail

Background

5.1 The Council have a statutory duty to provide temporary accommodation to eligible households who are homeless. Whilst the number of homeless duties accepted remains relatively stable, the support needs of those accessing the service have increased, with 70% of households presenting with at least one support need. This has resulted in both an increase in demand for temporary accommodation, and longer placements.

5.2 Stafford Borough Council currently leases fifteen units of temporary accommodation from Homes Plus. There are twelve two-bedroom and three one-bedroom properties. Leased units are prioritised for families with children with the average stay between 10 - 16 weeks, depending on the size of the family and any support needs of the household. Where leased units are not available, the Council is reliant upon bed and breakfast accommodation which is getting more difficult to source due to competing demands and low tolerance levels for households with support needs. Commercial hotel chains often have quota limits on the number of local authority placements they will accept at any given time and we are reliant on local relationships to continue such placements.

5.3 The focus for Housing Options is always to prevent households from needing temporary accommodation. However, wider pressures on public services means households are presenting at crisis point, in need of temporary accommodation.



5.4 Since January 2026, we've had on average twenty households placed in Bed and Breakfast accommodation at the end of each month which demonstrates a requirement for additional temporary accommodation units.

5.5 Whilst the majority of our demand is from single homeless applicants, we have seen families accessing the service who are finding it more difficult to access long-term housing. Local authorities can only use bed and breakfast accommodation to house families for a maximum of six weeks. The new Local Authority Outcome Framework places additional oversight and governance on households in temporary accommodation, particularly families being placed for more than six weeks. Chief Executives will receive notification of every family placed in bed and breakfast for more than six weeks. Local authorities with more than five households exceeding six weeks in Bed and Breakfast will be mandated to develop a Bed and Breakfast Elimination Plan.

5.6 A previous review of temporary accommodation outlined that the most cost-efficient model to expand temporary accommodation would be for the council to own and manage their own stock. In Summer 2026, renovation works will begin to convert office accommodation to six single units of temporary accommodation that are owned and managed by Stafford Borough Council. We expect the units to be completed by March 2027. In addition, the Council has recently purchased a two bedroom house to be available as temporary accommodation for Autumn 2026. Whilst this has been a positive step forward to start the supply of council owned temporary accommodation, there is an ambition to increase the number of properties owned to meet demand from Housing Options.

Local Authority Housing Fund - Permission to Spend

5.7 In December 2025, Stafford Borough Council submitted a bid for the Local Authority Housing Fund Round 4 (LAHF 4) for fixed capital and revenue funding to provide temporary accommodation alongside a minimum of one unit of housing for families under the Afghan Resettlement Programme (ARP). ARP offers a safe and legal route to relocation for individuals who supported UK efforts or are vulnerable, granting them indefinite leave to remain with full access to public funds. Families will be settled into the accommodation and, should they come to move on, the property will revert to temporary accommodation for our homeless duties.

5.8 Stafford Borough Council has received a capital allocation of £351,300 to deliver two units of temporary accommodation and one unit for resettlement housing in 2026-2027. The grant comprises of £96,100 per property (based on 40% of median property price in Stafford Borough) and £21,000 per property to account for other costs, for example refurbishment and conveyancing costs.

5.9 We are requesting permission to spend the above funding and additional funds for the purchase (and any associated refurbishment costs) of three properties in pursuance of the LAHF 4 funding. Recent market research has indicated that the average cost of two and three bedroom properties, including estimated renovation costs, in Stafford Borough is £225,000.

5.10 We are requesting capital funding of an additional £107,900 per property to cover the purchase, refurbishment and other costs associated with the purchasing of each property. Any unspent allocation will be returned to the general fund.

5.11 A temporary accommodation policy is being drafted and a paper on the management of the accommodation, including rents and service charges will be bought to Cabinet for a decision once we have further details of the properties we are looking to purchase.

6 Implications

6.1 Financial

The Council has received a capital grant of £351,300 from the Local Authority Housing Fund for the purchase of three homes to support temporary accommodation. As set out in paragraph 5.10 in order to purchase the properties the Council will be required to provide additional funding from its own resources. The report to Council in February 2026 stated unallocated capital resources were £1.495 million. It is proposed that the additional cost of £323,700 is funded from the unallocated capital resources

6.2 Legal

The Council has a statutory duty to provide temporary accommodation to homeless persons under Part 7 Housing Act 1996. Its legal powers to do so are found under s.9 Housing Act 1985 which permits the Council to provide housing accommodation and s. 120 (1) Local Government Act 1972 which confers powers to purchase land for the Council to undertake its statutory duties. There is also a general power of competence under s.1 of the Localism Act 2011 which means the Council can generally do what an individual can do, acting reasonably.

In accepting the funding under LAHF 4, the Council must adhere to the terms of a Memorandum of Understanding between the Council and the Ministry for Housing, Local Government and Communities ('MHLGC'). These have been considered by legal officers and are not duly onerous and as would be expected to see as standard from MHLGC.

The properties will be purchased under the Financial Procedure Rules in respect of levels of valuations (but not the procurement regime as the purchase of land and buildings are exempt) but any associated works will be procured in accordance the Contract Procedure Rules as any such works are subject to the procurement regime.

Legal Officers will ensure a robust and thorough conveyancing process is followed.

6.3 Human Resources

None

6.4 Risk Management

If we do not take steps to expand our stock of temporary accommodation, we risk not being able to fulfil our statutory function under homeless legislation to provide suitable accommodation to eligible households. The alternative is costly bed and breakfast placements which are increasingly difficult to source and may not be sustainable for vulnerable households, including families.

All properties will be registered under the Council's insurance provision. All properties will need to be maintained, ensuring compliance with relevant regulations for social housing. Existing property management arrangements and specialist knowledge within asset management will support the above.

6.5 Equalities and Diversity

Anyone can become homeless and the service has a duty to provide temporary accommodation for anyone who is eligible. Understanding the demographics of those who come through the service enables us to tailor provision to those characteristics. There is need for more accessible temporary accommodation for those with disabilities, older households and those with very young children, this will be one factor in choosing suitable properties. If these properties aren't accessible, plans will be developed with our existing temporary accommodation to understand whether any can be converted to ensure they meet a wide variety of needs. Although units of all sizes are required there is a specific need for larger family accommodation. Accommodation needs to be self contained, in particular for those fleeing domestic abuse and for those with mental health challenges. Properties should be located near to public transport to enable residents to access employment and services.

6.6 Health

Health and housing are intrinsically linked and the provision of suitable temporary accommodation has a direct impact on a household's overall health and wellbeing, both in terms of households facing homelessness and those who are rough sleeping. Suitable temporary accommodation that is local to existing support networks, including health and social care providers, alongside family and friends, will have a positive impact on the overall health and wellbeing of the household.

6.7 Climate Change

Properties are being refurbished to a standard that promotes energy efficiency, in line with budgetary requirements.

7 Appendices

None

8 Previous Consideration

None

9 Background Papers

None

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Ward Interest:	NA
Report Track:	Cabinet 17 September 2026 (Only)
Key Decision:	No

Agenda Item 4(c)i

Collections Development Policy (Historic Stafford)

Committee: Cabinet

Date of Meeting: 17 September 2026

Report of: Head of Wellbeing

Portfolio: Leisure Portfolio

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1. Purpose of Report

1.1 To agree a collections development policy specifically covering care, accessions, loans and dispersals for the historic collections of the district housed at the Ancient High House, Izaak Walton Cottage and Stafford Castle.

2. Recommendations

2.1 To agree the policy updates in line with national recommendations and legislative changes. That the revised policy is accepted and the principles contained within put into practice.

2.2 To note the formation of a governing Accessions, Loans and Dispersals group with oversight of collections development as part of the revised policy.

3. Reasons for Recommendations

3.1 The Collections Development Policy is required to be refreshed ahead of a review of Accreditation standards for the Historic Stafford estate in autumn 2026 by Arts Council England. Additions have been made to the policy to reflect changes to national guidance and legislation for example attention to ethical collecting.

3.2 A refreshed policy aims to improve collections access and care. This sits primarily around the need to digitise the collection to include items on a national catalogue - a process which has not yet started. It enables museums to better catalogue items for condition checking and care and gives the public 24-hour online access to artefacts - for interest and research. Digital recording to a national catalogue also ensures that if items are lost, stolen or irreparably damaged, a record remains.

3.3 The revised policy identifies clear and robust processes and decision-making around accessioning (adding items to a collection), loans and dispersals (removing items from a collection). It sets out the governance for these processes, which will be undertaken by a proposed Accessions, Loans and Dispersals group.

4. Key Issues

4.1 A collections development policy sets out the process and standards by which a governing body maintains and cares for a collection. It should be regularly reviewed and updated to reflect any national and local changes.

4.2 The policy prioritises digitisation of collections. This allows care standards to be improved and encourages greater public access to collections. The collection is currently recorded on an Excel spreadsheet. This can cause recording and tracking errors. The collection is also not digitally available to the public or national collecting bodies.

4.3 While collections care in Stafford is good, decision making around accessions, loans and dispersals can been improved, better meeting the clarity of national governance standards. Decision-making has largely sat with the on-site contracted team. Examples of good governance indicate a more robust approach could be taken to approving loans, dispersals and accessions.

4.4 It is best practice for a governing body to have oversight on these areas to ensure that items being added (via accession or loan) to the collection are appropriate. This includes considering the insurance value and cost of ongoing conservation against the public benefit when adding items which might tell the Borough’s story better. It is also important that there is oversight on the legal duties around collecting (for example, specific laws on collecting human remains, archaeological finds), as well as consideration for responsibilities around sensitive collecting (e.g. that may have links to slavery or oppression).

4.5 Similarly, the authority should be involved in decision-making around any dispersals. This ensures that thorough consideration has been given before any items are removed from the collection taking into account legal, moral and community duties as custodians of the collection.

5. Relationship to Corporate Priorities

5.1 The Collections Development Policy supports the Council to deliver Priority 2 of its Corporate Plan. Heritage collections support the opportunity for local people and communities to enjoy healthy lifestyles by providing good leisure and cultural services.

5.2 The Policy also relates to Priority 4, an Effective Council by setting out how we will achieve good governance in decision making around the collections, and value for money to local taxpayers ensuring that collections are well cared for and accessible.

6. Report Detail

6.1 Stafford Borough Council is the legal guardian of historic artefact collections - housed within the Historic Stafford buildings, currently managed on the authority's behalf by Freedom Leisure as part of the wider leisure operating contract.

6.2 The collections are formally accredited. This is a standard granted by Arts Council England and serves as a benchmark for professional standards in collections care, governance and public engagement.

6.3 The standards allow museums, particularly those operated by local councils, to have oversight around museum collections ensuring accountability and sound decision-making processes while providing a platform for strategic cultural planning and grant funding opportunities.

6.4 In order to maintain Accreditation status, a governing body (the Council in this case), should from time-to-time review and amend its collections development policy to ensure it is fit for purpose and demonstrates improvements in governance, care and access around collections.

6.5 A collections development policy sets out the process and standards by which a governing body maintains and cares for a collection.

6.6 Care and management of the collection currently sits with contracted operator, Freedom Leisure. The council remains the governing body with legal responsibility to ensure the collection is maintained to required standards by the contracted operator.

6.7 Review of Freedom Leisure's standards around collections is currently undertaken by the council's leisure officer who has a large amount of experience of working with Accredited collections and historic environments.

6.8 Collections care by Freedom Leisure is good. In line with best practice, a museum-qualified professional to MA standards is employed by the operator. They work alongside the heritage manager to provide oversight on day-to-day management of collections. This includes condition checking, managing environmental conditions and accurately recording items.

6.9 The Collections Development Policy has been updated in consultation with the Freedom Leisure team to reflect changes in national guidance. The sector has moved from a “collect everything” approach towards active collections review. Museums are encouraged to assess significance, remove duplication and consider responsible disposal where collections no longer support organisational purposes.

6.10 The revised policy has much stronger attention to provenance and due diligence research and the policy is more explicit about ethical acquisition.

6.11 Like many museums, the heritage service operated for many years on a paper-based index card system for recording artefacts. More recently, records have been moved to a Microsoft Excel database.

6.12 A move to digitise collections would catalogue items in one online depository.

6.13 Digitising allows collections and conservation staff to better manage collections. It also enables volunteers, students, community and academic researchers to access collections online to find out more about collection items. Should items become lost, stolen or irreparably damaged, a digitised collection ensures that the artefacts details are retained as a national record for future research. There is currently no formal route for accessioning, loaning and disposing of items in collections. This could present a risk to the authority as the governing body if items are not considered accurately. For example, a high value artwork in poor condition could potentially be accessioned and responsibility for its value and continued conservation would fall to the council. Similarly, a piece of significant community or national value could be inaccurately disposed of, leading to community loss and potential intervention from national governing bodies.

6.14 To support work around accessions, loans and dispersals, the policy notes that the collection is currently insured under the council’s general all risks policy. Moving forwards, it would be wise to establish whether a specialist collections insurance scheme may be more suitable. This work is included within the collections development plan.

6.15 Decision-making currently sits with the Freedom Leisure heritage manager and collections officer. While their choices have been sound and are not being called into question, it is important moving forwards that they are supported by the council as governing body to make those decisions.

6.16 It is proposed within the policy that an Accessions, Loans and Dispersals group is set up meeting bi-annually with oversight and formerly recorded decision-making in line with the collections development policy. It is recommended that the group consist of council officers, designated elected members, Historic Stafford (Freedom Leisure) staff and an independent critical friend with museum experience. It is also recommended that a role is created within the group for a volunteer or member of the community looking to gain knowledge and skills around collections care and management.

6.17 The group will manage collections in accordance with the requirements of the UK Museum Accreditation Scheme standards, ensuring that all acquisitions, documentation, loans, movements and disposals are undertaken in a consistent, accountable and professional manner.

6.18 Any items considered for accessions, loans or dispersal would be presented to the group who would review key areas such as current condition, legal status, monetary value, community value, risk, provenance and any loan or donor agreements. The group would have a clear checklist of items to consider in line with policy documents such as the Collections Development Policy.

6.19 A soft testing of this group decision-making took place in May 2026. The Potteries Museum and Art Gallery offered a small number of low value items (£5-£10) displayed at The Ancient High House for accession. These items have been on long term loan for between 10 and 20 years (at which point it is good practice for long-term loans to be reviewed for accession by the hosting location). Freedom Leisure staff were joined by the council leisure officer and an independent museum professional to review each item for consideration against key standards and considerations with the decision-making recorded. The process worked well and is now ready to be scaled up to a formally appointed group.

6.20 It is important to note that the Council does not have a budget for accessions. Any accessioned items considered by the group would be by gift, bequest or exchange. Should a particular item of notable public interest be offered for purchase, the group would consider it in line with the policy around accessions and any available funding. Dispersals can be made by either returning to previous owners, offering to alternative museums and heritage providers, moving low value items into its own “handling collections” for educational purposes, or disposal.

6.21 The policy, and the actions and processes within it, will be delivered using existing council and contractor staffing resources.

7 Implications

7.1 Financial

The report sets out revisions to the collections management policy, this is delivered on our behalf by the leisure contract provider Freedom within the policy set by the Council. The revised policy includes digitisation for which there is no existing funding and will be dependent on grant applications by Freedom.

The Council is also required to record the Heritage assets within its financial statements including value of assets, acquisitions and disposals.

7.1 Legal

The Collections Development Policy should be compliant with relevant legislation and regularly reviewed and updated (as described in the main body of this report) to maintain such compliance.

The procurement of any goods or services in connection with the Policy or formation of the Accessions, Loans and Dispersals group (for example, the digitisation of collections may require the procurement of systems/software and/or additional staff) must be conducted in accordance with the Council's Procurement Regulations, the Procurement Act 2023 and the Procurement Regulations 2024.

Any terms and conditions governing grant funding awarded to the Council by third-party organisations will need to be considered in each case, and, where appropriate, obligations will need to be included in any contracts between the Council and the ultimate recipient of such funding, so that obligations are passed on to suppliers. This would include where funding is awarded to the Council in the first instance and is subsequently passed on to Freedom Leisure.

7.2 Human Resources

None

7.3 Risk Management

None

7.4 Equalities and Diversity

Digitising collections will make them more accessible to a wider range of people.

While the service is not actively collecting, items will be considered if they relate to former female residents of the Ancient High House and Izaak Walton's cottage.

7.5 Health

The policy is expected to have a positive impact on health and wellbeing for communities in the Borough. Excellent standards of care, documentation and digitisation of collections will improve public access to local heritage. Helping residents to learn about, and connect with local identity, memory and their sense of place can support mental wellbeing, community pride and belonging. Clearer decision making on accessions, loans and dispersals will help ensure that collections reflect the Borough's communities appropriately and are used in ways that maximise public benefit. Health inequalities will be considered through service and delivery wider outreach; the benefits of the policy may not be experienced equally if digital access, physical access or interpretation is not inclusive. This is mitigated through strengthened strategic partnership working with heritage, cultural, education and voluntary sector organisations.

7.6 Climate Change

None

8 Appendices

Appendix 1:	Collections Development Policy
Appendix 2:	Accessions, Loans and Dispersals Group Draft Terms of Reference
Appendix 3:	Collections Decision-making Framework
Appendix 4:	Loans Policy

9 Previous Consideration

None

10 Background Papers

None

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Ward Interest:	N/A
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Key Decision:	No

Collections Development Policy

Name of museum	
Historic Stafford: The Ancient High House, Stafford Castle, Izaak Walton Cottage	
Name of governing body:	
Stafford Borough Council	
Operational Management of the historic sites and collections:	
Wealden Leisure, trading as Freedom Leisure	
Date on which this policy was approved by governing body	*To be confirmed September 2026*
Policy review procedure:	
The collections development policy will be published and reviewed from time to time, at least once every five years.	
Date at which this policy is due for review	September 2029
Arts Council England will be notified of any changes to the collections development policy, and the implications of any such changes for the future of collections.	

1. Introduction and Governance

1.1 Historic Stafford's collections are held in trust by Stafford Borough Council for the benefit of present and future generations. The collections contribute to public understanding of the history, people, buildings and heritage of Stafford Borough and support learning, research, engagement and enjoyment.

1.2 This policy establishes the framework through which collections will be developed, documented, managed, reviewed and made accessible. It supports Stafford Borough Council's responsibilities as governing body, ensuring that all acquisitions, loans, documentation, rationalisation and disposals are undertaken transparently, ethically and in accordance with professional standards.

1.3 The Council recognises the importance of balancing sustainable collections management with public benefit and will ensure decisions regarding collections are informed by the Museum Accreditation Standard, Spectrum Collections Management procedures and the Museum Association Code of Ethics.

1.4 The collections are currently cared for and maintained by Wealden Leisure, trading as Freedom Leisure. Freedom Leisure have a contract to manage the Borough's leisure and cultural assets until November 2027.

1.5 However, the Council still maintains oversight of the collection and works in conjunction with Freedom Leisure to ensure collections care in managed to required standards and that acquisitions, dispersals and loans are undertaken using clear governance.

1.6 Oversight of acquisitions, long-term loans, rationalisation and disposals is provided through an Accessions, Loans and Disposals Group, which operates within delegated authority agreed by the governing body. The group consists of council officers and elected members, Freedom Leisure heritage staff and independent individuals.

1.7 Recommendations from the group are formally recorded and retained alongside collections documentation to provide a clear audit trail and support accountability in collections management. The group meets biannually, but may convene more regularly, as required.

1.8 The group will ensure that the Collections Development Policy reflects national and local needs and may make minor alterations to this policy to reflect changing legislation or readjusted local needs.

1.9 Any alterations to collections management and development governance and its associated policies may be reviewed from time to time by the Council's elected Cabinet. Large material changes to the collections development policy (for example a significant change of focus around accessions and dispersals and productions of a refreshed policy following a review date) will be presented to Full Council and any decisions around this may be reviewed by the elected Scrutiny Panel.

1.10 Decision-making by the Accessions, Loans and Dispersals group, is available on request to elected members and senior officers of the Council.

2. Statement of Purpose

2.1 Connecting people to the historic sites of Stafford through its built heritage and collections, actively supporting communities to be part of the Borough's Heritage.

3. Relationship to other relevant policies/plans of the organisation

3.1 The Collections Development Policy has been developed in line with Stafford Borough Council’s Corporate Priorities set out in the Corporate Plan (2025-2028). The policy directly relates to being an effective Council, meeting the needs of the local community, providing value for money, and ensuring good governance.

3.2 The Collections Development Policy is supported by the following documents: Loans Policy, Emergency Salvage Plan, Terms of Reference for the Accessions, Loans and Dispersals Group, Accessions and Dispersals Decision-making Framework.

4. History of the collections

4.1. The Ancient High House is the largest surviving timber-framed Tudor town house in England. Built in 1595 for the Dorrington family, wealthy local wool merchants, it is one of Stafford's most significant historic buildings. In the 19th century the building was adapted for commercial use, with shops occupying the ground floor. Recognising its importance to the Borough's heritage, Stafford Borough Council acquired and restored the property, opening it as a museum in 1986. Today, the Ancient High House operates as a free museum and exhibition space, interpreting the history of the building, its residents and the wider story of Stafford.

4.2. Stafford Castle, set in 26 acres, has dominated the local skyline for over 900 years. Established shortly after the Norman Conquest, the original timber motte-and-bailey fortress was later rebuilt in stone by the First Earl of Stafford, in the 14th century. The castle reached its height under the Stafford family before falling into decline and being partially demolished during the English Civil War. It was rebuilt in the Gothic Revival style in the early 19th century before falling into ruin again in the 1950s.

4.3. The castle and its surrounding grounds were acquired by Stafford Borough Council in 1978, securing the site's long-term preservation and enabling its development as a free public heritage attraction.

4.4. Izaak Walton's Cottage is a Grade II listed 16th-century timber-framed farmhouse at Shallowford, once owned by Stafford-born author and angler Izaak Walton, who purchased the property in 1655 as a rural retreat. Following his death in 1683, Walton bequeathed the estate to the people of Stafford for the benefit of the town's poor. After falling into decline during the 19th century, the cottage was rescued by the Izaak Walton Cottage Trust, which opened it as a museum in 1924.

4.5. Stafford Borough Council assumed responsibility for the site in 1956 and undertook major restoration works in 1990, reinstating its traditional thatched roof and recreating a 17th-century interior. Today, the cottage operates as a free seasonal museum, offering visitors an insight into Walton's life, rural Staffordshire and the history of angling.

4.6. The historic collections primarily relate to the Ancient High House and Izaak Walton Cottage. Stafford Borough Council employed its first Museum professional in 1992 and provisional registration was granted in 1993. Full registration was granted in 1995. In 1995 an Accessions register was created and items were added retrospectively and numbered. Initially these records contained little detail about the items or their origins. Reproduction items were accessioned as well as original items. Many of the items were labelled with an accession number at this time.

4.7. In 1999 some of the reproduction items were deaccessioned and this is recorded in the accessions register. In 2000 a programme of cataloguing all of the objects was started and most of the retrospective cataloguing was completed over the next few years. This was done on Museum Catalogue cards as per MDA guidelines. A room-by-room location Index was also created. From this time, exit and loan forms were filled in and filed. At the same time all supporting documentation that could be found was collected, filed and cross referenced. For some items no information could be found, and it was only staff memories that have provided background information for some of the items.

4.8. In December 2017 Stafford Borough Council awarded a contract to Freedom Leisure to manage the day-to-day operation of all three heritage sites. This contract is in place until November 2027. In 2022/2023 the Catalogue Cards were moved onto an excel spreadsheet. In 2024 a number of reproduction and handling items were deaccessioned, and this is recorded in the accessions register. In 2026, an Accessions, Loans and Dispersals group was created to improve governance around collections.

4.9. It is now the intention to commence work on digitising collections creating a catalogue for open public access. It in the intention that this work will commence before this policy’s next review date.

5. Reference in previous documentation of 5,000 photographic slides (located at the Civic Offices)

5.1. A previous policy incorrectly referenced a large number of modern photographs previously used for occasional educational purposes as part of the collection. These were not formally accessioned into the collection and have little or no value in terms of telling the stories of our spaces through artefacts or remuneratively. After review, it has been established that they do not form part of the collection and will not be referenced in this document. They will remain in their current location, in the care of SBC outside of museum accreditation.

6. An overview of current collections

6.1. The current collections items reflect the social context of the buildings. This includes furniture, decorative art, tools and utensils from the late Tudor period to the Edwardian age.

6.2. This includes approximately 1,000 Artefacts**:**

- Items relating to social history
- Items relating to domestic history
- Posters, prints and maps
- 18th and 19th century wallpaper fragments
- Furniture from the late-Tudor to Edwardian times for period settings
- Stafford Crested Ware and commemorative souvenirs
- Items relating to costume and accessories
- Paintings, prints and other images of the Ancient High House
- Items relating to modern embroidery and cross-stitch
- Items relating to hobbies and pastimes
- Items relating to fishing
- Items related to Izaak Walton
- Items relating to education
- Items relating to architecture
- Items relating to childhood
- Items relating to retail distribution
- Items relating to craft industries
- Items relating to currency
- Items relating to previous occupants of the Ancient High House and Izaak Walton Cottage

6.3. The collection includes a small number of pieces of fine art:

- Oil on canvas of a mountainous landscape featuring a waterfall by A.G. FRITH (Dated 1880).
- Oil portrait on canvas of Alderman Thomas Sidney, MP for Stafford in 1847 and 1860, Lord Mayor of London 1853-4.
- Oil portrait on canvas of Mrs Mary Whitby of Haywood Abbey, near Stafford (c.1750) - *item on loan from Staffordshire Archives and Heritage Service*

7. General Principles

7.1. The Council and the Accessions, Loans and Dispersals Group will ensure that both acquisition and disposal are carried out openly and with transparency.

7.2. The heritage service has a long-term purpose and holds collections in trust for the benefit of the public in relation to its stated objectives. The Accessions, Loans and Dispersals Group therefore accepts the principle that sound curatorial reasons must be established before consideration is given to any acquisition to the collection, or the disposal of any items in the Heritage Service's collection.

7.3. Acquisitions outside the current stated policy will only be made in exceptional circumstances.

7.4. The heritage service recognises its responsibility, when acquiring additions to its collections, to ensure that care of collections, documentation arrangements and use of collections will meet the requirements of the Museum Accreditation Standard. This includes using Spectrum primary procedures for collections management. It will take into account limitations on collecting imposed by such factors as staffing, storage and care of collection arrangements.

7.5. The service will undertake due diligence and make every effort not to acquire, whether by purchase, gift, bequest or exchange, any object or specimen unless the Accessions, Loans and Dispersals Group or responsible officer is satisfied that the Heritage Service can acquire a valid title to the item in question.

7.6. In exceptional cases, disposal may be motivated principally by financial reasons. The method of disposal will therefore be by sale and the procedures outlined below will be followed. In cases where disposal is motivated by financial reasons, the Accessions, Loans and Dispersals Group will not undertake disposal unless it can be demonstrated that all the following exceptional circumstances are met in full:

- the disposal will significantly improve the long-term public benefit derived from the remaining collection
- the disposal will not be undertaken to generate short-term revenue (for example to meet a budget deficit)
- the disposal will be undertaken as a last resort after other sources of funding have been thoroughly explored
- extensive prior consultation with sector bodies has been undertaken
- the item under consideration lies outside the Heritage Service's established core collection

8. Themes and priorities for future collecting

8.1. Maintaining the current collection and expanding its care, while improving access to the collection (both digitally and physically), is the key priority for the council.

8.2. The authority is therefore not actively collecting, or seeking to collect. However, it is accepted that there may be occasions where accessioning items into the collection is beneficial for the wider benefit of the portfolio and that there are small clearly identified gaps in the storytelling of the collection and buildings. These may benefit from key pieces being considered for accessioning under special circumstances.

8.3. The heritage service may also consider acquiring contemporary material that records the ongoing history, conservation, interpretation and community use of Stafford Castle, the Ancient High House and Izaak Walton Cottage where such material is judged to have long-term significance.

8.4. Historic Stafford does not currently actively collect born-digital material.

8.5. The Heritage Service may obtain objects which are not intended for the permanent collection, but which may be used as part of the handling collection for educational and outreach purposes.

8.6. These items may only be obtained upon the agreement of the person transferring the material and their understanding that preservation cannot be guaranteed, and that indeed their condition may in fact be worsened as a result of direct handling.

9. General collecting principles

9.1. Historic Stafford will collect in accordance with the following general principles:

9.2. Items collected should bear a clear relationship to Stafford and the county, and to former occupants of the buildings.

9.3. Material may be collected by donation, bequest or purchasing as funding permits.

9.4. Consideration must be given to collection care, access, information, staffing capacity and storage required.

9.5. Objects will not be accessioned if its conservation needs do not meet its potential value of display or learning.

9.6. Passive collecting through donations by the public will not be undertaken except in exceptional circumstances.

9.7. Any items considered for accessioning will be reviewed by the Accessions, Loans and Dispersals Group with a clear decision-making log with reasoning recorded.

9.8. Items viewed for accession will be assessed against a clear framework of guiding principles for collection including:

Areas of future collecting interest/collecting priorities

- A recent review has identified the following gaps in the collection:
- Embroidered items created by the Borough Broderer's for the Ancient High House and their diary which are currently in storage but have not yet been formally accessioned.
- Items which have a direct link to past residents of the houses, The Ancient High House and Izaak Walton Cottage, particularly female residents.
- Potentially hazardous items will not be collected e.g. weapons, chemicals, hazardous substance content.

Themes and priorities for rationalisation and disposal

- The Heritage Service recognises that the principles on which priorities for rationalisation and disposal are determined will be through a formal review process that identifies which collections are included and excluded from the review. The outcome of review and any subsequent rationalisation will not reduce the quality or significance of the collection and will result in a more useable, well managed collection.
- The procedures used will meet professional standards. The process will be documented, open and transparent. There will be clear communication with key stakeholders about the outcomes and the process.
- When proposing rationalisation and disposal, careful consideration will be taken and any potential disposals will be presented to the review panel.

Legal and ethical framework for acquisition and disposal of items

- The Heritage Service recognises its responsibility to work within the parameters of the Museum Association Code of Ethics when considering acquisition and disposal.

Collecting policies of other museums

- The heritage service will take account of the collecting policies of other museums and other organisations collecting in the same or related areas or subject fields. It will consult with these organisations where conflicts of interest may arise or to define areas of specialism, in order to avoid unnecessary duplication and waste of resources.
- Specific reference is made to the following museum(s)/organisation(s):

    - Stafford History Centre
    - Staffordshire and Stoke-on-Trent Archive and Heritage Service
    - The Potteries Museum and Art Gallery
    - The Brampton Museum
    - Tamworth Castle Museum
    - Lichfield Heritage Centre
    - Tutbury Museum
    - Redfern Cottage - Museum of Uttoxeter Life
    - Staffordshire Moorlands District Council

Archival holdings

- Although the service holds items which may be loosely considered as archival material, these are treated and held as items within the main collection and are governed by the Collections Development Policy.
- Annual reviews will be given to archival items to consider if they may be better suited to be cared for at alternative institutions, with particular attention paid to Staffordshire and Stoke-on-Trent Archive and Heritage Service. These will be completed by the Accessions, Loans and Dispersals Group.

Acquisition

- The policy for agreeing acquisitions is:
- Potential acquisitions are considered by the Accessions, Loans and Dispersals Group using this policy as guidance. The group meet biannually and all decision-making is formally recorded via minutes and records attached to any items that are formally added to the collection.
- The heritage service will not acquire any object or specimen unless it is satisfied that the object or specimen has not been acquired in, or exported from, its country of origin (or any intermediate country in which it may have been legally owned) in violation of that country's laws. (For the purposes of this paragraph 'country of origin' includes the United Kingdom). The service will undertake detailed provenance work and due diligence before considering any item.
- In accordance with the provisions of the UNESCO 1970 Convention on the Means of Prohibiting and Preventing the Illicit Import, Export and Transfer of Ownership of Cultural Property, which the UK ratified with effect from November 1 2002, and the Dealing in Cultural Objects (Offences) Act 2003, the heritage service will reject any items that have been illicitly traded. The Accessions, Loans and Dispersals Group will be guided by the national guidance on the responsible acquisition of cultural property issued by the Department for Culture, Media and Sport in 2005.

Human remains

- The heritage service does not hold or intend to acquire any human remains.

Biological and geological material

- The heritage service will not acquire any biological material. The service will not acquire geological material where there is reasonable cause to believe it has been collected in violation of applicable laws, regulations, or landowner permissions.

Archaeological material

- The service will not acquire archaeological materials where there is reasonable cause to believe it has been collected in violation of applicable laws, regulations, or landowner permissions.
- The heritage service will not acquire archaeological material unless the Accessions, Loans and Dispersals Group is satisfied that the material has been excavated, recovered and transferred in accordance with applicable legislation and best practice, including the Treasure Act and Portable Antiquities Scheme where relevant.

Exceptions

- Any exceptions to the above clauses will only be because the heritage service is:
    - acting as an externally approved repository of last resort for material of local (UK) origin
    - acting with the permission of authorities with the requisite jurisdiction in the country of origin.
    - In these cases, the heritage service will be open and transparent in the way it makes decisions and will act only with the express consent of an appropriate outside authority. The heritage service will document when these exceptions occur.

Spoliation

- The heritage service will use the statement of principles 'Spoliation of Works of Art during the Nazi, Holocaust and World War II period', issued for non-national museums in 1999 by the Museums and Galleries Commission.

The Repatriation and Restitution of objects and human remains

- The collection does not contain items that would be considered for repatriation or restitution.

Disposal procedures

- All disposals will be undertaken with reference to the Spectrum primary procedures on disposal.

- The Accessions, Loans and Dispersals Group will confirm that it is legally free to dispose of an item. Agreements on disposal made with donors will also be considered.
- When disposal of a museum object is being considered, the heritage service will establish if it was acquired with the aid of an external funding organisation. In such cases, any conditions attached to the original grant will be followed. This may include repayment of the original grant and a proportion of the proceeds if the item is disposed of by sale.
- When disposal is motivated by curatorial reasons the procedures outlined below will be followed and the method of disposal may be by gift, sale, exchange or as a last resort - destruction.
- The decision to dispose of material from the collections will be taken by the Accessions, Loans and Dispersals group only after full consideration of the reasons for disposal. Other factors including public benefit, the implications for the heritage service's collections and collections held by museums and other organisations collecting the same material or in related fields will be considered. Expert advice will be obtained and the views of stakeholders such as donors, researchers, local and source communities and others served by the heritage service will also be sought.
- A decision to dispose of a specimen or object, whether by gift, exchange, sale or destruction (in the case of an item too badly damaged or deteriorated to be of any use for the purposes of the collections or for reasons of health and safety), will be the Accessions, Loans and Dispersals group acting on the advice of professional curatorial staff.
- Once a decision to dispose of material in the collection has been taken, priority will be given to retaining it within the public domain. It will therefore be offered in the first instance, by gift or sale, directly to other Accredited Museums likely to be interested in its acquisition.
- If the material is not acquired by any Accredited museum to which it was offered as a gift or for sale, then the museum community at large will be advised of the intention to dispose of the material normally through a notice on the MA's Find an Object web listing service, an announcement in the Museums Association's Museums Journal or in other specialist publications and websites (if appropriate).
- The announcement relating to gift or sale will indicate the number and nature of specimens or objects involved, and the basis on which the material will be transferred to another institution. Preference will be given to expressions of interest from other Accredited Museums. A period of at least two months will be allowed for an interest in acquiring the material to be expressed. At the end of this period, if no expressions of interest have been received, the heritage service may consider disposing of the material to other interested individuals and organisations giving priority to organisations in the public domain.
- Any monies received by the heritage service from the disposal of items will be applied solely and directly for the benefit of the collections. This normally means the purchase of further acquisitions. In exceptional cases, improvements relating to the care of collections in order to meet or exceed Accreditation requirements relating to the risk of damage to and deterioration of the collections may be justifiable. Any monies received in compensation for the damage, loss or destruction of items will be applied in the same way. Advice on those cases where the monies are intended to be used for the care of collections will be sought from the Arts Council England.

- The proceeds of a sale will be allocated so it can be demonstrated that they are spent in a manner compatible with the requirements of the Accreditation standard. Money must be restricted to the long-term sustainability, use and development of the collection.
- Full records will be kept of all decisions on disposals and the items involved and proper arrangements made for the preservation and/or transfer, as appropriate, of the documentation relating to the items concerned, including photographic records where practicable in accordance with Spectrum procedure on deaccession and disposal.

Disposal by exchange

- The nature of disposal by exchange means that the heritage service will not necessarily be in a position to exchange the material with another Accredited museum. The Accessions, Loans and Dispersals Group will therefore ensure that issues relating to accountability and impartiality are carefully considered to avoid undue influence on its decision-making process.
- In cases where the Accessions, Loans and Dispersals Group wishes for sound curatorial reasons to exchange material directly with Accredited or non-Accredited museums, with other organisations or with individuals, the procedures in paragraphs 9.1-5 will apply.
- If the exchange is proposed to be made with a specific Accredited museum, other Accredited museums which collect in the same or related areas will be directly notified of the proposal and their comments will be requested.
- If the exchange is proposed with a non-Accredited museum, with another type of organisation or with an individual, the heritage service will place a notice on the MA's Find an Object web listing service, or make an announcement in the Museums Association's Museums Journal or in other specialist publications and websites (if appropriate).
- Both the notification and announcement must provide information on the number and nature of the specimens or objects involved both in the heritage service's collection and those intended to be acquired in exchange. A period of at least two months must be allowed for comments to be received. At the end of this period, the Accessions, Loans and Dispersals Group must consider the comments before a final decision on the exchange is made.

Disposal by destruction

- If it is not possible to dispose of an object through transfer or sale, the Accessions, Loans and Dispersals Group may decide to destroy it.
- It is acceptable to destroy material of low intrinsic significance (duplicate mass-produced articles or common specimens which lack significant provenance) where no alternative method of disposal can be found.
- Destruction is also an acceptable method of disposal in cases where an object is in extremely poor condition, has high associated health and safety risks or is part of an approved destructive testing request identified in an organisation's research policy.
- Where necessary, specialist advice will be sought to establish the appropriate method of destruction. Health and safety risk assessments will be carried out by trained staff where required.

- The destruction of objects should be witnessed by an appropriate member of the heritage service workforce. In circumstances where this is not possible, eg the destruction of controlled substances, a police certificate should be obtained and kept in the relevant object history file.

10. Digitisation

10.1. Historic Stafford is committed to improving access to collections through digitisation.

10.2. During the lifetime of this policy, the service will work towards the creation of a publicly accessible digital catalogue. Digitisation will support:

- Improved collections management.
- Enhanced public access.
- Research opportunities.
- Conservation and risk management.
- Long-term preservation of collections information.

10.3. Digitisation priorities will be determined according to significance, condition, demand and resource availability.

10.4. When digitising items, the heritage service will seek to clarify ownership of associated intellectual property rights where relevant. Transfer of physical ownership will not be assumed to include transfer of copyright.

11. Insurance

11.1 The collection is currently insured under the Council's general all risks policy. During the term of this policy, refreshed valuation work will be undertaken to inform a view on whether more specialist collections cover may be appropriate.

Accessions, Loans and Dispersals Group

Draft Terms of Reference

1 Purpose

The Accessions, Loans and Disposals Group exists to provide oversight, scrutiny and recommendations relating to the development, management, review and rationalisation of Historic Stafford's collections.

The Group supports Stafford Borough Council, as governing body, in ensuring that all acquisitions, loans, rationalisation and disposals are undertaken in accordance with:

- The Historic Stafford Collections Development Policy.
- The Museum Association Code of Ethics.
- The Museum Accreditation Standard.
- Spectrum Collections Management Procedures.
- Relevant legislation and professional guidance.

The Group will ensure that collections decisions are transparent, proportionate, properly documented and demonstrably in the public interest.

2. Role and Responsibilities

The Group will:

Acquisitions

- Review and determine proposed acquisitions to the collections.
- Assess proposed acquisitions against the Collections Development Policy.
- Consider significance, provenance, relevance, condition, storage requirements and resource implications.
- Ensure appropriate due diligence and title checks have been completed before accessioning.

Loans

- Review and approve incoming and outgoing long-term loans.
- Consider risks associated with loans, including security, conservation, insurance and public benefit.
- Ensure loan agreements comply with the museum's Loans Policy and Accreditation requirements.

Rationalisation and Disposals

- Review proposals for rationalisation, transfer, exchange, sale or disposal of collections items.
- Ensure disposals are undertaken in accordance with the Collections Development Policy, Museum Association guidance and Spectrum procedures.
- Consider stakeholder consultation requirements where appropriate.
- Ensure the public benefit case for disposal is clearly documented.

Collections Review

- Identify areas of the collection requiring review.
- Consider opportunities to improve collections care, access and documentation.
- Review archival material held within the collections and determine whether alternative custodianship may be more appropriate.

Governance

- Maintain an auditable decision-making process.
- Ensure recommendations and decisions are formally recorded.
- Review the Collections Development Policy from time to time to ensure it is current and make amendments where necessary
- Report significant decisions and emerging issues to Stafford Borough Council as required.
- Make recommendations to Stafford Borough Council concerning any major amendments to collections governance arrangements

3. Membership

The Group will consist of:

Voting Members

- Elected Member of Stafford Borough Council (Chair).
- At least one other elected member
- At least one officer representing Stafford Borough Council.
- Heritage Manager (Freedom Leisure).
- Museum or Heritage Collections Officer (Freedom Leisure).

- Up to two independent members with relevant museum, archive, conservation or heritage expertise.

Non-Voting Advisers

The Group may invite specialist advisers where professional or technical expertise is required, including representatives from:

- Staffordshire History Centre.
- Staffordshire Archives and Heritage Service.
- Arts Council England.
- Conservation specialists.
- Subject specialists.

4. Quorum

The quorum shall be:

- One elected Member.
- One Stafford Borough Council officer.
- One Freedom Leisure heritage representative.

No decisions shall be made unless the meeting is quorate.

5. Meetings

- The Group will meet at least twice each year.
- Additional meetings may be convened where urgent business requires consideration.
- Meetings may be held in person or virtually.
- Agendas and supporting papers will normally be circulated at least five working days in advance.

6. Decision-Making

- Decisions will normally be reached by consensus.
- Where consensus cannot be reached, decisions will be determined by a simple majority of voting members present.
- In the event of an equal vote, the Chair shall have a casting vote.
- Members must declare any actual, potential or perceived conflict of interest and may be required to withdraw from discussion and decision-making.

7. Records

- Formal minutes will be maintained for all meetings.
- Decisions relating to acquisitions, loans, rationalisation and disposals will be recorded within collections documentation.
- Records will be retained in accordance with Stafford Borough Council's record retention requirements and Spectrum procedures.

8. Accountability

The Group operates on behalf of Stafford Borough Council as governing body and remains accountable to the Council.

Major policy changes, significant disposals, decisions carrying substantial financial implications, or matters likely to attract public interest shall be referred to the Council for consideration in accordance with the Council's governance arrangements.

9. Review of Terms of Reference

These Terms of Reference shall be reviewed at least annually in its first three years, or sooner where required by changes to legislation, Accreditation requirements, governance arrangements or museum best practice.

Created June 2026

Historic Stafford Collections Review Scoring Framework	COLLECTIONS USAGE AND CONDITION CRITERIA		* GIVE THE HIGHEST RATING POSSIBLE EXCEPT FOR CONDITION WHICH IS LOWEST*			
	A AUDIENCE APPEAL FOR GALLERY DISPLAY	B SUPPORTS LEARNING PROGRAMMING	C SUPPORTS ENQUIRY / RESEARCH	D SUPPORTS WELLBEING AND ENGAGEMENT WORK	E SIGNIFICANCE	F CONDITION
0	**No current use. Potential unclear - requires further research - possibly with external expert and/or user group support**					
1	• Low relevance to interests of audience groups • Unsuitable for display	• No evident potential to support current or future learning programmes • Unsuitable for learning use	• No evident relevance to interests of local user groups or wider research audience • Not suitable for supporting research	• Unsuitable for engagement work • No evident potential to support current or future wellbeing or engagement programmes.	• Falls outside our collecting policy • Provenance unknown / unresearchable • Damaged beyond use	• Material deteriorating and/or potentially hazardous to staff or users • Could pose risk to co-located items • Damaged or decayed beyond repair • Not boxed or dust protected • Objects inadequately packed/protected within boxes • Overcrowding within boxes
2	• Relates to a topic of general interest to some audience groups • Unlikely to be used for display to any audiences	• Not currently used, but has potential to support known learning needs of audiences	• Poor example of a type of which our organisation holds other examples • Little evident potential to support our audiences' current research interests/needs • Little evident potential to support wider research interests/needs	• Not currently used, but has potential to be incorporated into wellbeing and engagement programming.	• Falls within our organisation's collecting policy • Relates contextually to topics/activities of interest to our organisation and audiences, but little direct relevance.	• All *vulnerable* objects dust protected • Most objects wrapped / protected within boxes • Some overcrowding in boxes • *Vulnerable* objects on open display adequately supported / protected • Some items incomplete / damaged / deteriorating, but no evident risk to people or co-located material • Interventive conservation work required before any handling or use permitted
3	• Useful support material for interpreting our collections • Potential to be used for display • Engages visitor/user interest • Relates to a core topic of interest to some audience groups	• Has clear potential to be used in formal education and training programmes • Has potential to support informal learning • Has potential to support use of other parts of collection for learning	• Good or fair example of a type that has potential to support enquiries or other research • Good or fair example of a type that has potential to be cited by museum staff when answering enquiries	• Has clear potential to be used in engagement and wellbeing work. • Has potential to support use of other parts of the collection for wellbeing/engagement.	• Relates clearly to topics /activities of core interest to our audiences • Supports understanding of other material in our collections	• Material currently stable • Some objects incomplete, damaged or poorly restored • Cleaning / minor conservation needed before any use • Major conservation needed for display use • All objects dust protected or boxed • Objects in boxes wrapped / protected • Most items packed in conservation grade materials • All objects on open display adequately supported / protected
4	**As 3+** • Cited in website resources/ collection descriptions • Cited to represent/illustrate quality and scope of collections • Used for short term display/ for outward loan • Used successfully in previous public engagement • Image of item requested for reproduction	**As 4+ 3+** • Has been used in formal / informal education and training programmes • Has clear potential to support planned future learning objectives / programmes • Has the potential to form the basis of a new learning offer.	**As 3+ some of these** • Already used to support research • Occasionally cited by museum when answering enquiries • Part of identified group or type of material with research potential for our audiences and/or wider audiences	As **4+3+** • Has been used successfully in previous wellbeing and engagement programming • Has potential to contribute to an identified planned future programme or audience. • Has potential to be the basis of a new wellbeing/engagement activity.	**As 4+3+** • Good, unusual or archetypal example relating to topics / activities of core interest to our organisation and its audiences	**As 3 +** • No overcrowding in boxes • All items held in, conservation grade materials • Objects in adequate condition for handling / research • Minor conservation / cleaning / repair required for display use
5	**As 2+3+some/ all of these:** • 'Iconic' item - strongly identified in the public's mind with our organisation • Of high local / regional / national / community specific / media interest • Featured in website/collection descriptions/marketing material • On 'permanent' / regular display • Frequently used in events /outreach projects • Used as source for shop stock or other commercial usage • Image frequently requested for reproduction • Relates to a core topic of interest to our audience • Acquired / preserved with public support/funding	**As 4+3+2+** • Regularly used in formal education and training programmes • Regularly cited/used to support informal learning	**As 3+2+** • Featured in our organisation's collection descriptions • Cited in relevant publications • Frequently cited by museum staff for enquiries • Rare, unique or archetypical example of its type or only example of its type in our collections	**As 4+3+2+** • Regularly used in existing wellbeing and engagement programmes.	**As 4+3+2+** • Outstanding / unique example relating to topics or activity of core interest to our audiences • Well-provenanced with links to person or organisation of core interest to audiences	**As 3+2+** • Material clean and in good condition for display / handling / research • Where appropriate, all objects secured or in single layer within boxes to enable easy viewing without over- handling (ie not stacked on each other) • Items on display protected / secured / supported using customised mounts where required

Appendix 4

Loans Policy Historic Stafford

Last review: May 2026

Stafford Borough Council supported by Freedom Leisure

1. Introduction

Loans play an important role in supporting the interpretation, display, learning, and research activities of Historic Stafford. Borrowing objects allows the museum service to enhance understanding of local history, tell stories that are not otherwise represented within the permanent collection, and improve public access to heritage. Similarly, lending objects enables wider audiences to engage with the collections and supports collaborative working with museums, community organisations, educational institutions, and other partners.

All loans, whether incoming or outgoing, will be managed in accordance with Museum Accreditation requirements and recognised museum sector standards. Historic Stafford is committed to ensuring that loan arrangements are transparent, appropriately documented, legally compliant, and supported by suitable standards of collections care, security, and environmental management.

All loans will be managed in accordance with the Museum Accreditation Standard, Spectrum Collections Management Procedures, and the Museum Association Code of Ethics.

2. Long-term Loans Review

A review of current loans has established that a number of items have had agreements renewed annually, creating arrangements previously referred to as "long-term loans".

Following a review of all loaned items, the following actions have been undertaken:

- Items lacking sufficient provenance information have been identified, and efforts are being made to establish ownership and donor details.
- Owners of items identified for return have been contacted. Arrangements have been made to return items that do not support the collection, display, interpretation, or research objectives of Historic Stafford.
- Items currently on display that are considered important to the collection will be reviewed by the Accessions, Loans and Disposals Group in accordance with the Collections Development Policy and Acquisition Procedures to determine whether accessioning into the permanent collection is appropriate.

3. Loans In

Historic Stafford will not accept any object on loan where there is reasonable cause to believe that:

- The lender does not hold legitimate title to the object.
- The object has been stolen, illegally imported, exported, or excavated.

All incoming loans will be reviewed annually.

Historic Stafford will consider borrowing items in accordance with its Collections Development Policy. Incoming loans will normally support the themes, stories, interpretation priorities and identified collection gaps set out within the Collections Development Policy. Particular consideration may be given to objects that enhance understanding of the social history of Stafford, the Ancient High House, Stafford Castle, Izaak Walton Cottage, and associated intangible heritage.

Objects may be borrowed for purposes including, but not limited to:

- Temporary exhibitions or displays at any of Historic Stafford's sites.
- Educational activities.
- Research projects.

The following principles apply to all incoming loans:

- The relevant Collections Officer will be responsible for the administration and documentation of loans in accordance with Historic Stafford's Documentation Policy and associated procedures.
- Loan conditions will be assessed to ensure that appropriate standards of care, security, and environmental control can be met before a loan is agreed.
- Historic Stafford, via Stafford Borough Council, will provide insurance cover or Government Indemnity for the value specified by the lender for the duration of the loan.
- Objects on loan will be cared for to the same standards as objects owned by Historic Stafford, in accordance with the requirements of Museum Accreditation. This includes appropriate documentation, handling, storage, security, and conservation measures.
- Consideration will be given to the care requirements, accessibility, interpretation, information management, and storage needs of each object. Loans will not be accepted where conservation, security, or storage requirements cannot be adequately met.
- Remedial conservation work will only be undertaken with the prior agreement of the lender.

- Appropriate due diligence and provenance checks will be undertaken before any incoming loan is accepted. Historic Stafford reserves the right to refuse items where ownership, provenance, or legal title cannot be satisfactorily established

Loans for purposes other than display, education, or research will only be accepted in exceptional circumstances.

All incoming loans must be approved by the Accessions, Loans and Dispersals Group.

4. Loans Out

Requests for outgoing loans will be considered by Accessions, Loans and Dispersals Group.

Loans may include, but are not limited to:

- Learning and research loans.
- Exhibition loans, including touring exhibitions.
- Partnership loans.
- Outreach loans.

Historic Stafford will consider requests to lend objects on a case-by-case basis. Requests may be received from organisations that are not UK Accredited or Registered museums and galleries (or an equivalent overseas organisation).

Decisions on loan requests will be based on an assessment of the public benefit of the proposed loan, balanced against risks to the object and the reputation of Historic Stafford. Consideration will be given to:

- Existing commitments and programming.
- The interests and expectations of visitors and audiences.
- The rarity, significance, and condition of the object.
- The risks associated with transport and handling.
- The standards of collections care, environmental management, and security at the borrowing venue.

Loans will only proceed where the borrower agrees to Historic Stafford's terms and conditions.

Historic Stafford supports increased public access to and engagement with its collections. There is therefore no fixed limit on the number of venues that may be included within a loan proposal.

However, the fragility, significance, or existing display commitments of particular objects may restrict travel to some venues. Approval will be considered on a case-by-case basis.

For international loans, the borrower will be responsible for obtaining all necessary customs, export, and import documentation.

Borrowers are encouraged to consider sustainability measures when undertaking loans, including the reuse and recycling of crates, packing materials, and transport resources where appropriate.

5. Costs

The borrower will normally be responsible for all costs associated with a loan. Historic Stafford may consider contributing towards costs where an incoming loan is judged to deliver significant public benefit and aligns with organisational objectives.

Costs may include:

- Conservation treatment.
- Mounting and framing.
- Condition reporting.
- Documentation and research.
- Packing and crating.
- Courier expenses.
- Transportation.
- Photography.
- Insurance.
- Security arrangements.
- Indemnification against loss, damage, or deterioration of the borrowed objects.

Some outward loans, particularly to any international venues, may also incur an administrative charge.

6. Facilities Reports

Historic Stafford will normally require a facilities report from any borrower before approving a loan. The level of information required will be determined on a case-by-case basis, taking into account the significance, condition, and intended use of the object.

The Collections Officer may specify environmental requirements for individual loans and may request monitoring data throughout the loan period, including information relating to:

- Temperature.
- Relative humidity.
- Integrated pest management.
- Security arrangements.
- Display and storage conditions.

Borrowers may be required to provide periodic reports demonstrating compliance with these requirements for the duration of the loan.