

**FALKIRK COUNCIL**

**MINUTE of MEETING of the EXECUTIVE held within the MUNICIPAL BUILDINGS, FALKIRK on TUESDAY 28 APRIL 2015 at 11.55 a.m.**

**COUNCILLORS:**

David Alexander	Adrian Mahoney
Jim Blackwood	Craig Martin (Convener)
Tom Coleman	Dr Craig R Martin
Dennis Goldie	Malcolm Nicol
Gerry Goldie	Alan Nimmo
Linda Gow	Robert Spears

**OFFICERS:**

Fiona Campbell, Head of Policy, Technology & Improvement  
Danny Cairney, Accountancy Services Manager  
Ian Edwards, Environmental Co-ordinator  
Rhona Geisler, Director of Development Services  
Rosemary Glackin, Chief Governance Officer  
Jennifer Litts, Head of Housing  
Robert Naylor, Director of Children's Services  
Brian Pirie, Democratic Services Manager  
Mary Pitcaithly, Chief Executive  
Alistair Shaw, Development Plan Co-ordinator  
Celia Sweeney, Corporate Policy Officer (Equalities)

**EX1. APOLOGIES**

No apologies were intimated.

**EX2. DECLARATIONS OF INTEREST**

No declarations were made at this stage.

**EX3. MINUTE**

**Decision**

**The minute of the meeting of the Executive held on 17 March 2015 was approved.**

**EX4. FALKIRK FORESTRY AND WOODLAND STRATEGY**

The Executive considered a report by the Director of Development Services presenting the Falkirk Forestry and Woodland Strategy and accompanying maps for approval.

The Strategy was procured, and paid for, by Forestry Commission Scotland and developed in partnership with the Council, Central Scotland Green Network Trust and

Scottish Natural Heritage and sits within the Scottish Government's Scottish Forestry Strategy.

The Falkirk Strategy will guide forestry and woodland management and expansion in the area and provide a strategic and spatial framework to optimise the contribution of woodland and forestry to the people, environment and economy in the area. Upon approval, the plan will be available on the Council's and Commission's websites and will replace the Indicative Forestry Strategy 2002 set out in the Council's Structure Plan and the Council's Urban Woodland Strategy 2007.

During the course of discussion, Councillor Gow advised that she was a member of the Board of Central Scotland Green Network Trust but did not consider that this required her to recuse herself from consideration of the item.

### **Decision**

**The Executive approved the Falkirk Forestry and Woodland Strategy Final Draft and accompanying maps.**

Councillor D Goldie joined the meeting during the previous item.

## **EX5. DEVELOPMENT PLAN SCHEME 2015**

The Executive considered a report by the Director of Development Services presenting the Development Plan Scheme for 2015 for approval.

The Development Plan Scheme sets out:–

- the Development Plan framework for the area, and how it is evolving;
- the key stages in preparing a Local Development Plan;
- the intended programme for completing the first Local Development Plan (LDP1) and the associated Supplementary Guidance, and the process of preparing its review (LDP2); and
- how the Council will involve the community and agencies at each stage in the preparation of LDP2 (participation statement).

It is envisaged that the Falkirk Local Development Plan (LDP1) will be adopted by the Council in June 2015 and will replace the Structure and Local Plans as the operative Development Plan for the area for the period to 2024.

Councils are required to review Development Plans every five years. The report set out the planning and timetable for the development of the next Plan (LDP2), to be in place by 2020.

### **Decision**

**The Executive approved the Development Plan Scheme 2015.**

**EX6. EQUALITY MAINSTREAMING AND EQUALITY OUTCOMES UPDATE 2015**

The Executive considered a report by the Director of Corporate and Neighbourhood Services providing an update on the progress made in regard to the Council's Equality Outcomes.

The Executive agreed, on 7 May 2013 (ref EX8), the Council's Equality Outcomes for the period to 2017.

The progress report identified the 11 actions relating to the three Equality Outcomes – Community, Employment and Education, and set out progress made in achieving the Outcomes. An Action Plan for the period 2015 – 2017 was also provided.

**Decision**

**The Executive agreed:-**

- (1) the Equality Outcomes Action plan covering the period 2015 – 2017;**
- (2) the publication of the report on the Council website by 30th April 2015;**
- (3) to note the case study examples and progress against the 2013 Equality Outcomes; and**
- (4) to note the timescale of the next report due by end of April 2017.**

**EX7. PENSION FUND – SOCIAL/AFFORDABLE HOUSING INVESTMENT**

The Executive considered a report by the Director of Corporate and Neighbourhood Services advising that funding had been secured from the Scottish Government to meet a funding shortfall for two Social/Affordable Housing developments at Bellsdyke and Redding.

On 13 January 2015 (ref EX105), the Executive was advised of a £4m funding shortfall for a Pension Fund investment in social and affordable housing. While £2.35m was available as a one off contribution from the Scottish Government Financial Innovation Unit, the balance remained to be found. It has since been confirmed that the balance can be met by drawing down early future years affordable housing grant funding (RPA).

**Decision**

**The Executive agreed to bring forward c£2.35m Affordable Housing Grant (RPA) to facilitate the funding of new build developments at Bellsdyke and Redding, as part of the Council's Pension Fund investment in Social/Affordable Housing.**



**FALKIRK COUNCIL**

**Subject: HERITAGE DELIVERY PLAN – FALKIRK COMMUNITY TRUST**  
**Meeting: EXECUTIVE**  
**Date: 19 MAY 2015**  
**Author: DIRECTOR OF CORPORATE & NEIGHBOURHOOD SERVICES**

**1. INTRODUCTION**

- 1.1 Members will recall as part of the development of the Culture and Leisure Strategy, Falkirk Community Trust advised that they would be preparing delivery plans to set out how certain aspects of that Strategy would be implemented.
- 1.2 This report presents for Member's consideration the first of these delivery plans – Heritage. The attached sets out the Trust's rationale for the plan – appendix one, the plan itself, appendix two and the comments received by the Trust on the delivery plan from the Council, appendix three.

**2. RECOMMENDATION**

- 2.1 It is recommended that the Executive consider the Heritage Delivery Plan as prepared by the Falkirk Community Trust.

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**DIRECTOR OF CORPORATE & NEIGHBOURHOOD SERVICES**

Date: 27 April 2015  
Ref: ABB0515FC  
Contact Name: Fiona Campbell

**LIST OF BACKGROUND PAPERS**

1. Culture and Leisure Strategy – Report to the Executive

Any person wishing to inspect the background papers listed above should telephone Falkirk 01324 506230 and ask for Fiona Campbell.

## FALKIRK COUNCIL

**Subject:** A Heritage Delivery Plan for Falkirk 2015-18  
**Meeting:** Falkirk Council  
**Date:** 28 April 2014  
**Author:** Chief Executive, Falkirk Community Trust

## 1. Introduction

- 1.1 Falkirk Community Trust is producing a suite of delivery plans to cover its areas of activity in support of *Inspiring Active Lives*, a Culture and Sport Strategy for Falkirk which was approved by the Council on 18 March 2014.
- 1.2 The first of these plans to be completed is the Heritage Delivery Plan and this report provides an outline of the approach that was taken to preparing and drafting the Plan. A copy of the text of the draft Plan is appended to this report for consideration and approval by the Council.

## 2. Approach

- 2.1 Preparation and approval of the Plan preceded approval of *Inspiring Active Lives* as a strategic heritage plan was required to be completed by autumn 2013 in order to meet Museum Accreditation timescales. However, it was decided to delay seeking Council approval until the main strategy document had been approved.
- 2.2 In line with *Inspiring Active Lives*, the Plan is a shared document and whilst the Trust has a key role in leading the development of heritage in the area, there are several organisations and groups involved in delivery of heritage-based activity. Their involvement in the Plan's preparation is described under **Consultation** below, and their involvement in the delivery of the plan is critical. The Plan provides a framework of common understanding and purpose and an outline of key projects; the Plan also seeks to ensure that opportunities are grasped to meet the area's needs and to minimise the challenges that this sector will face over the coming years.
- 2.2 In addition to the work undertaken for *Inspiring Active Lives*, determining what these opportunities and challenges are has drawn on a wide range of knowledge of heritage engagement and provision at local and national levels, and from voluntary and professional sources, together with knowledge of changes in wider strategic context from sector strategic lead bodies.
- 2.3 We have sought to be careful in managing expectations, balancing ambition and aspiration against increasingly challenging financial circumstances. Ensuring that our aspirations, plans and delivery models are resilient, adaptable and sustainable is at the heart of this Plan.

## 3. The Plan Document

- 3.1 The structure of the document is briefly described as follows.
  - 3.1.1 The **Executive Summary** gathers together the main features of the Plan – changing local identity, the changing role and value of heritage, the major projects through which this value is to be realised, and the cause for optimism over our ambitions despite significant challenges to resource availability.
  - 3.1.2 The **Introduction** states the Plan's relationship to *Inspiring Active Lives*, and the intention of the Plan itself, including setting the direction for local heritage activity.
  - 3.1.3 **Definition of Heritage** establishes what we mean by 'heritage' for the purposes of this Plan, describes briefly how heritage influences the character of the local community, how heritage is encountered and its value to the community.

- 3.1.4 **The Scope of Local Heritage Engagement** describes as comprehensively as possible those organisations and groups that collectively make up the experience of heritage engagement in the Falkirk area.
- 3.1.5 **Achievements and Actions 2003-15** summarises the achievements and developments in heritage activity in the Falkirk area over the last 12 years. This section incorporates an overview of achievements against the Falkirk Council Heritage Strategy and Museum Plan 2006-11.
- 3.1.6 The **Vision and Mission for 2015-18**. The Plan shares the same vision as *Inspiring Active Lives*. As a supporting Delivery Plan, its mission is new and specific to how heritage-based activity will contribute to this vision. The mission is:
- To support general wellbeing and a sense of identity by connecting people with each other, with their place, with their place in time, and with their environment, and to encourage them to make active contributions to stewarding the future.*
- 3.1.7 **Strategic Context 2015-18** sets out the changes, opportunities and challenges which will face local heritage-based developments over the next few years. The scene has been set by *Inspiring Active Lives*, but this view of the strategic landscape is further augmented by developments specific to heritage activity:
- The focus on specific major local development projects;
  - Impacts of economic, environmental, demographic and educational change;
  - Strategic change in the heritage sector nationally.
- 3.1.8 **Guiding Principles for the 2015-18 Plan**. These principles guide us towards achieving the vision and mission for the Plan, while taking into account the opportunities and challenges of the strategic context going forward. In brief they are:
- To raise the outward profile of the Falkirk area;
  - To develop the wellbeing of the local community;
  - To encourage people to see local heritage in a larger framework;
  - To ensure that our aspirations, plans and delivery models are resilient, adaptable and sustainable.
- 3.1.9 **Heritage Delivery Plan**. This section is organised to address the four themes of *Inspiring Active Lives*:
- Participation
  - Motivation
  - Venues
  - Partnership

Actions, partners and outcomes are set against the objectives relevant to heritage within each of these themes.

## 4. Consultation

- 4.1 The content of the Plan drew on the collective knowledge, working at both local and sector-wide levels, of the professional staff of Falkirk Community Trust. The views, roles and activities of the local voluntary sector, including the Scottish Railway Preservation Society, were actively sought and discussed. Consultation took place with the Falkirk Council Elected Members whose portfolio included heritage matters, with Falkirk Council's Education Services, Development Services (Economic Development and Planning and Environment), and Policy and Community Planning to ensure the plan took account of both service needs and key service and corporate strategies.
- 4.2 The final drafts of the Plan were reworked as necessary as a result of being shared initial consultees and contributors. Feedback from local sources provided detail with which to provide a more comprehensive coverage of activity, while that from sector lead bodies has confirmed the relevance of its overall direction.

- 4.3 The Plan was approved by the Falkirk Community Trust Board for consideration and approval by Falkirk Council at its August 2013 Board meeting.
- 4.4 All elected members and service directors were provided with a copy of the draft Delivery Plan earlier this year with an opportunity for them to comment prior to it being considered by the Executive. To date, only three responses have been received and these are summarised in Appendix 2.
- 4.5 It is worth noting that in the time between Board and the completion of this report, work has been ongoing to start work on some of the key elements of the Delivery Plan including:
- Callendar House was awarded 5 stars in the VisitScotland Quality Assurance Scheme, the highest award level in this scheme.
  - The annual visitor figure to Callendar House for 2013/14 for the first time passed 40,000. This includes access by 4,600 schoolchildren to our education programmes, which represents subscription to these programmes at or near full capacity.
  - Additional programmes have been delivered with the aid of grant-funding worth in excess of £113,000 (grants for Kinneil Museum redisplay, World War One intergenerational learning project, Callendar House lighting, Kinneil Church and burial ground consolidation, and salary share of the Townscape Heritage Initiative and Scottish Canals placement projects).
  - The first year of the THI heritage engagement programme included collaborations with schools; with Falkirk Local History Society who delivered a series of walks, talks, articles for the Falkirk Herald and a special edition of Calatria focusing on the Steeple; with Falkirk BID to produce the Steeple 200 event.
  - The World War One commemoration programme, *'Memorial, Reflection and Restoration'* began and included the development of a web portal to provide on-line historical information, information on events and links to other information sites – for example BBC, Commonwealth War Graves, and a 'hub' to share information and promote activity by groups and organisations throughout the area. There were two exhibitions in Callendar House for 2014 – War, A Conversation with Objects and Refractory and Refrigeration, part of Generation, 25 Years of Contemporary Art in Scotland. The Hippodrome Festival of Silent Film in 2014 presented 'Home Front Picture Houses, with documentary material demonstrating the importance of cinemas in conveying news of the conflict. This year's Festival will include a talk and film from the Imperial War Museum. The 2014/15 winter programme of talks at Callendar House includes The War Memorials Project, Falkirk and the Munitionettes, and A Picture of Falkirk on the Eve of War. We worked with Grangemouth Sea Cadets on a HLF-funded project to research McCrae's regiment. We took part in are planning the UK-wide 'Lights Out' event on 4 August 2014.
  - Items from the Council's collection were used in two exhibitions in the Howgate Centre; one, a collaboration with Eden Consultancy, featured a series of aerial photos of Falkirk and the surrounding area and the second, part of the first year programme of the THI, told the fascinating story of the Steeple.
  - The Archive Service has been accredited for the standard and quality of its operation, the first in Scotland to be so awarded under the new scheme for archive in the UK. It joins Callendar House and Kinneil Museum, which are fully accredited museums under the longer-standing scheme for UK museums.
  - The World War One intergenerational learning project being carried out (with HLF funding) by our learning team with Laurieston Primary School has attracted media attention at national level – from the Glasgow Herald and from MacTV who are producing a programme to be broadcast on Armistice Day this year.
  - Our reminiscence boxes, released by the Learning Team in January, elicited the following response from Falkirk and District Association of Mental Health. We were told that the users *"were all captivated by the range of original items you had. All*



*participated in the lively discussions, which were led beautifully. They really appreciated the warm and friendly approach and were really impressed with the knowledge and expertise in this area”.*

- In May 2014, our Learning Team was nominated by Falkirk Council Education Services as an Enterprise Champion for its workshop on the experience of shopping for music in the 1960s for P2-3. This is in recognition for inspiring and encouraging young people to develop an enterprising attitude.
- A recent Council health and safety inspection on the quality of our premises management described Kinneil Museum as ‘*a fine example of a well-run facility*’ – which is an indicator of the quality of our work in the asset management which supports our public activity.

## **5. Conclusion**

- 5.1 This Delivery Plan is intended to drive the Trust’s Business Plan, and gives a clear outline of intent to key partners and stakeholders, who will hopefully align their resources and direct their local plans accordingly.
- 5.2 At present, there are good indications to show that there is a desire and ability by individuals and groups in the area to take direct responsibility for contributing to community wellbeing through heritage-based activity. The Plan also emphasises that there are opportunities through which such aspirations can be realised.
- 5.3 The Plan also attempts to balance this ambition and optimism against a forecast of circumstances which we know will be complex, changing, unpredictable and characterised by reducing resources. While it is important to state our aspirations in terms which are recognisable now, it is equally important to keep the door open to different ways of doing things, different outcomes and new ways of defining success.

## **6. Recommendation**

- 6.1 **The Council is asked to approve the Plan for publication.**

Maureen Campbell  
Chief Executive

## HERITAGE DELIVERY PLAN FOR FALKIRK 2015-18

*'We don't inherit the earth from our ancestors, we borrow it from our children'.*  
(David Brower, founder, John Muir Institute for Environmental Studies)

### EXECUTIVE SUMMARY

This Plan is set at a time of marked change in the Falkirk area. As the area's identity as an industrial centre recedes further into the past, so the identification of local people with that era becomes less marked, and the rich and deeper diversity of the area's heritage is deployed, not only in celebrating the inheritance of previous generations, but also in preparing for a future which will make new demands on people in terms of lifestyle expectations, assumptions and values.

Projects like Callendar House, the Falkirk Wheel, the Hippodrome and the Antonine Wall World Heritage Site have helped the process of renewal in the area and contribute to its tourism offer, and these will be joined at the core of this Plan by a set of new projects which will extend that process over the next three years – Falkirk Townscape Heritage Initiative, a Masterplan Plan for Kinneil Estate, Callendar House & Park and the Helix. These projects, along with the area's central location, transport connections and diverse business base create a firm foundation for the building the area's Tourism Strategy. While these projects will be the focus for partnership amongst the range of players who do so much to value the heritage of the area, we also plan to generate activity and events which contribute to well-being within our communities.

As a contribution to the future well-being and changing identity of the area, we are mindful of the major issues which face the achievement of this Plan – the economic climate, the need for more sustainable life and work styles, and changes in social values. We know that the impact will be profound and demand changes in the scale, type and expectations of heritage engagement. This may be a difficult time for some, but as we have 'stewarding the future' at the heart of our mission, it will also be particularly exciting for those interested in evolving how heritage is experienced, understood and valued.

## INTRODUCTION

*Inspiring Active Lives*, A Culture and Sport Strategy for Falkirk, sets out a vision and framework that will help those with shared interests to work together to continue the positive transformation of the Falkirk area and further develop the vision of the area as the 'place to be in the 21<sup>st</sup> century'.

Heritage plays a significant role in delivering the ambition for the area and this Plan seeks to outline a methodology for inspiring, motivating and informing local people to understand and value their shared past, care for their shared heritage assets and, together, participate in creating and passing on to future generations the community described in our vision. This Plan seeks to set the direction for heritage delivery across the area.

## DEFINITION OF HERITAGE

In the previous Falkirk Council Heritage Strategy 2006-11, heritage was defined as the '*total of inherited ideas, beliefs, values and knowledge which constitute the shared basis of social action*' and we believe this definition remains valid for the purposes of the Plan for 2015-18. This definition makes clear that heritage contributes to how people understand themselves, their community and their worlds, and how it is active in informing the decisions they make about their present, their future and on behalf of future generations. To this end, the heritage sector safeguards those heritage assets deemed valuable to society (for example, buildings, landscapes, archives and museum collections, and intangible assets such as language and ways of living) and develops means of engaging the public with that value and its meaning.

The heritage of the Falkirk area has been formed by the area's location at the centre of Scotland and *Inspiring Active Lives* describes in detail the development of the area from Roman frontier to industrial heartland. The area's history and location have helped to define our communities and our landscape and this Plan aims to demonstrate how the area's heritage and, more importantly, our engagement with that heritage, will contribute to our wider aspirations to continue the positive transformation of the area and make it the 'place to be in the 21<sup>st</sup> century'. The Plan will outline our shared responsibility to promote understanding and awareness of this heritage and to protect both our heritage assets and our memories for future generations.

Our engagement with heritage takes many forms; it can be in-depth through education, personal interest or active membership of a local society or it can be a passing interest as a visitor to a museum or heritage site or it can be more oblique, through a chance encounter that sparks awareness or interest.

Falkirk's heritage comes in many forms: our landscape and built heritage of the area contribute to determining the character and image of the area; there is potential for engagement through understanding patterns of settlement and man-made structures such as the Antonine Wall, now a World Heritage Site. Our museums and their collections provide a window into the past and engagement with objects – as well as the stories behind them – offers the potential for powerful learning experiences. Our archives, local history collections and repositories of knowledge provide resources for genealogical and other research as well as improving understanding of the way we used to live. Conservation-led regeneration has the potential to contribute to sustainable development through promoting the efficient use and re-use of land and buildings as well as generating a range of tourism and employment benefits.

The consultative draft is informed by work undertaken during the development phase of *Inspiring Active Lives* and meetings with a range of public and third sector partners, clubs, societies and volunteers – all involved in – or with an interest in, the delivery of heritage activities and seeks agreement from stakeholders that the mission, priorities and delivery mechanisms are appropriate to take forward engagement with, understanding and protection of our area's heritage in a coherent and sustainable way.

## THE SCOPE OF LOCAL HERITAGE ENGAGEMENT

There are many disparate groups and organisations which enjoy and care about our heritage. By agreeing a Strategy for heritage in this area, we believe we can share our enthusiasm and expertise with each other more effectively, make better use of limited resources and make a significant contribution to the well-being of others. As partners, we have different perspectives and particular interests, but we have in common a passion for the tangible and intangible heritage which defines our sense of identity and which influences our decisions about the future.

The key organisations with an interest and involvement in heritage provision in the area are:

- Falkirk Community Trust takes the strategic lead for developing heritage engagement by the public in the Falkirk Council area, and is the advisor to the Council on heritage engagement and museum, archive and archaeological provision. Heritage Unit consists of three areas of professional heritage delivery – museums, archives and archaeology. The Community Trust manages Falkirk Council's two accredited museums – Callendar House and Kinneil Museum, the museum collection and archives as well as providing an archaeology service and, within the libraries, the local history collection; the two museums are both situated in landscapes of significant heritage interest including being on the route of the Antonine Wall;
- Scottish Railway Preservation Society runs the Bo'ness and Kinneil Railway and the Museum of Scottish Railways. The museum was awarded full Accreditation status in 2009 and its collection has also been recognised as being of national significance. SRPS is volunteer run with a professional curator and marketing officer and is a key player in the tourism economy of the area attracting over 60,000 visitors per year with volunteers drawn from in and beyond the Falkirk area.
- Falkirk Council Education Services is the main provider of formal and informal learning in the area through its primary and secondary schools, and community learning and development service. Learning to Achieve is the key strategy to raise attainment and achievement within the context of Curriculum for Excellence across the Council area. Understanding about and participating in heritage activity plays an important role in delivering the wider aims of the Curriculum for Excellence.
- Falkirk Council Development Services plays a key role in protecting and promoting understanding of built and natural heritage, initiating conservation-led regeneration initiatives and marketing the area as a visitor destination. The Economic Development service leads the delivery of the Tourism Strategy for the area.
- The voluntary sector is rich with organisations and societies involved in research and promotion of local heritage; Falkirk Local History Society is involved in a wide range of activities including regular meetings, guided walks in the Falkirk area, field trips, research and publication, talks to interested groups and heritage- related campaigns. The Friends of Kinneil help to promote and develop all aspects of Kinneil Estate and Foreshore in Bo'ness with a particular interest in built and natural heritage. The group co-ordinates Big Roman Week, is a generous supporter of Kinneil Museum as well as undertaking consultation and project development. Grangemouth Heritage Trust is based in La Porte Precinct in a building which houses a comprehensive range of photographs and artefacts from Grangemouth's past; the Trust also has a lively Facebook presence. Further activity is provided by the Greenhill and Bonnybridge Historical Society, Denny and Dunipace Heritage Society, Maddiston History Group, Falkirk Archaeological and Natural History Society and Bo'ness Civic Trust.
- Scottish Canals. With parts of the Forth and Clyde and Union Canals in the area, and focus on the Falkirk Wheel and the Helix, Scottish Canals is an important player in the local heritage landscape and its Heritage Strategy 2015-38 sets out its purpose in conserving its tangible and intangible heritage assets, using them to enable public participation, learning and access, and to provide the basis for economic and social benefits and environmental sustainability.
- Historic Scotland is the Scottish Government's executive agency charged with safeguarding the historic environment on behalf of Scottish Ministers. It has responsibility for maintaining

statutory schedules of monument and lists of historic buildings, for advising on policies for the historic environment, for the Antonine Wall World Heritage Site management plan, and for the management several sites in the area such as Kinneil House, Rough Castle and Blackness Castle.

The strength of the sector indicates that the area's heritage is in safe hands and we now seek to outline plans which are already in place as well as proposing a co-ordinated approach for future development.

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## ACHIEVEMENTS AND ACTIONS 2005-15.

The achievements in heritage provision over the past ten years, which includes the lifespan (2006-11) of the previous Heritage Strategy for the area, are set within the context of Falkirk's unique history and the challenge of transforming the area from one of industrial decline into one of growth. Our heritage environment is significantly richer through a mix of conservation-led regeneration, innovative programming and partnership working:

- The Antonine Wall was inscribed as a World Heritage Site in 2008 - the result of partnership working at local and national level; a new permanent gallery was created in Callendar House, a local stakeholder's group has been established to drive forward awareness and access. Big Roman Week is an annual event, established by Friends of Kinneil and supported by a range of partners across the area, and the Bridgeness Slab replica project demonstrated the value placed in heritage by local communities.
- Reappraisal of the area's nine conservation areas and the production of new management plans for these areas has added significantly to local character and identity, and has supported the development of Townscape Heritage Initiatives in Bo'ness and Falkirk Town Centres.
- The restoration of the Hippodrome Cinema was the critical project of the Bo'ness Townscape Heritage Initiative, which has given new impetus to the awareness of local people of the value of their built environment. The Hippodrome Cinema was reopened in 2009 and continues to flourish while a number of other key derelict buildings were restored and public realm improvements were undertaken. Most recently, Falkirk Council spent £1m restoring Matthew Steele Court and this project was accompanied by an HLF funded project in which 30 volunteers and 180 school pupils undertook research on the history of the block.
- We continue to work closely with Falkirk Council Economic Development to develop heritage engagement in the context of town centre regeneration; examples include the commissioning of Heart of Stenhousemuir and planned public art activity in Denny.
- As managers of some of the area's key heritage facilities, we continue to contribute to the Falkirk Tourism Strategy Partnership.
- Falkirk Council invested over £500,000 in a programme of maintenance and improvement for Callendar House. The House's energy efficiency was also improved through the extension of the district heating system from the Callendar Park flats to the House.
- Falkirk Greenspace Initiative won the Scottish Government Quality in Planning Award in 2012. The Greenspace Strategy links to the Central Scotland Green Network and Central Scotland Forest Trust in revitalising landscapes for biodiversity, recreation and investment. Three local nature reserves have been designated on former industrial sites in the Falkirk area, and the Inner Forth Landscape Initiative seeks to maximise on the natural and cultural heritage on the coast of the River Forth.
- The development of the Helix has opened up new opportunities for heritage engagement.
- The John Muir Trail (which opened in April 2014) has been secured and routed through the Falkirk area to maximise access to the area's heritage assets.
- We have worked in partnership with Forth Environment Link, Falkirk Environment Trust and Caledonia Clubhouse to create Cultivating Earth, the revitalisation of the walled garden in Callendar Park. The garden has been transformed into an active learning space influenced by contemporary environmental issues.
- We have developed new learning programmes and projects in partnership with Falkirk Council's Community Learning and Development Service as well as an expanded and wider offer to local schools.
- We participated in Forth's Timeline, a three year project funded through the Scottish Government's Regional Development Challenge Fund. The project demonstrated the

potential for collaborative promotion of museum collections as heritage tourism attractions across the Forth Valley.

- We work with heritage groups and property owners to deliver Doors Open Day in September of each year which provides opportunities to explore buildings generally not open to the public and highlighting the area's rich built heritage.
- There have been reductions in service delivery – principally, the closure of Birkhill Clay Mine and the closure of Grangemouth Museum. Both facilities faced significant investment requirements in respect of safety and access improvements.
- In 2012, Kinneil Museum was awarded 4 stars in VisitScotland's Quality Assurance Scheme.
- We manage of the Council's museum and archive collections and options for sustainable storage continue to be developed and this is a feature of the Plan for 2015-18.
- Falkirk Libraries redesigned the layout and refreshed the stock of the local history collection in Falkirk Library in 2015 and held Local History Week in May 2015, with the intention to run this event biannually across all local libraries and beyond.
- The on-line presence for heritage has developed, for example through use of Falkirk Local History Society's website, and through contributions by ourselves and Falkirk Council to BBC History of the World and Public Catalogue Foundation.
- The local voluntary sector has increased opportunities for heritage engagement and participation locally through the creation of new groups (for example Friends of Kinneil 2006 and Greenhill and Bonnybridge Historical Society 2008), through publications (Falkirk Local History Society), through helping to open historic sites to the public and creating new public programmes of activity (Friends of Kinneil).

## VISION AND MISSION FOR 2015-18

The vision of *Inspiring Active Lives*, A Culture and Sport Strategy for Falkirk is:

**A place with vibrant culture and sporting opportunities where people can achieve fulfilled and active lifestyles.**

In achieving this, the mission for heritage is:

**To support general well-being and a sense of identity by connecting people with each other, with their place, with their place in time, and with their environment, and to encourage them to make active contributions to stewarding the future.**

This mission acknowledges that heritage not only enables people to achieve fulfilment and well-being through understanding the place in which they live, it also has the potential to encourage people to realise that inheritance is created as well as received, and to participate in creating and passing on to future generations the kind of place we describe in *Inspiring Active Lives*. This mission responds to the strategic context.

## STRATEGIC CONTEXT 2015-18

*Inspiring Active Lives, A Culture and Sport Strategy for Falkirk* sets out the context of challenge and opportunity and has two aims: to increase and broaden participation in culture and sport and to help secure recognition for the Falkirk area as a vibrant place. The Strategy proposes delivering via four themes: participation, motivation, venues and partnership and it is these themes which provide the framework for the Heritage Delivery Plan. In addition, the Plan takes into consideration the specific heritage-related impacts of developments at local and national levels.

### Signature heritage projects in the Falkirk area

*Inspiring Active Lives* demonstrates very clearly that the Falkirk area continues to undergo a physical transformation which is changing the landscape and outward identity of the place.

Several high profile developments form the focus of this transformation:

- town centre regeneration which includes the Falkirk THI;
- the modernising the heritage offer in Callendar House and Park;
- the development of a plan for Kinneil Estate;
- the Helix;
- the Antonine Wall World Heritage Site;
- the Hippodrome Cinema;

These developments create opportunities to generate tourist visits to the area, opportunities for enjoyment, learning, training and research, and are key to creating a new self-identity for the local community. They form the spine of heritage activity during the forthcoming plan period.



## **Economic Considerations**

The economic climate for the foreseeable future, and certainly for period of this Plan, will be challenging. This will impact on funding for provision of services and activity. However, for visitor-based businesses, the economic outlook is different with tourism figures and expenditure in the area having increased year on year since 2009, and so significant opportunities may be available for the area's attractions and are articulated in the forthcoming Tourism Strategy for the area. As such, our plans and aspirations will need to be reviewed and adjusted to match availability of resources, and this may require some structural change to models of delivery. Resilience and adaptability will be required to enable plans and aspirations to be realised.

## **Environmental Considerations**

We will need to operate with regard to energy management and reducing our carbon footprint. Over recent years weather patterns and our need to adjust to them have made a more obvious impact on our operation. At the same time, environmental challenge, closely linked to economic challenge, presents a unique opportunity for the cultural sector. Engagement in heritage and arts is seen as a potential route to creating the new mind-sets and lifestyles that are demanded by environmental and economic challenge. The Scottish Government has recognised this role for the cultural sector and its potential to transform people's lives in *Low Carbon Scotland: Public Engagement Strategy*. Environmental considerations and sustainable development are growing features in the criteria of funding bodies.

## **Changing Audiences**

Preparing for this Plan has shown the importance of older people in the audience for heritage provision and in voluntary participation. The forecast proportional increase in the older population presents the professional and voluntary sides of the sector with valuable opportunities. At the same time we should be mindful of the sustainability of this audience and its impact on structures of provision and on our plans, as we cannot assume that the enthusiasm, commitment, tastes and choices of the participants of 2015 will be maintained by their immediate successors. New means of communication, not least digital communication, will mean the creation of potential new audiences, while spreading the value of heritage will require working with new partners in new areas of activity, using different methods of engagement and deploying different resources. Adaptability and sustainability of activities and processes (if not structures of delivery) will need to be built into the planning process going forward.

## **Changing Values**

In line with thinking on dealing with economic and environmental challenge, the Curriculum for Excellence defines success for the challenges facing the next generation of Scottish people. The Curriculum provides a common purpose for partnership for heritage activity in developing successful learners, confident individuals, responsible citizens and effective contributors.

## **Human Resource Considerations**

Delivering the Plan depends primarily on people, their availability, skills and knowledge. The professional sector will be faced with challenges to its capacity to meet the aspirations of this Plan. As lead partner for this Plan, this will put a strain on Falkirk Community Trust's resources in meeting the dual challenge of operating its own assets and managing its wider partnerships, while increasing the impact and effectiveness of both. We anticipate that a redesign of the professional structure will be required, and this will include a consideration of the availability for delivery of this Plan that is offered by the voluntary sector and other partners.

Crucial to this will be an assessment of how best to deploy the passion, knowledge and competence available from the human resource. There is no shortage of passion for heritage in the local area, nor of knowledge about it. Professional knowledge of how to manage the heritage resource is set by national standards (for example museums accreditation), which over the long-term change with circumstances. Compliance with these standards is key to enabling local operators to gain support from external bodies – eg funders, and this needs to be better

understood, not least in dealings between the professional and voluntary sectors. Competence is the key to how effectively passion and knowledge are deployed and, in the challenging circumstances which we will face, adaptability to those circumstances will be the crucial competence area.

### **New Sector-wide Strategic Directions**

Museums Galleries Scotland is the lead body for the sector in Scotland and co-ordinates the delivery of **Going Further, the National Strategy for Scotland's Museums and Galleries**. Mindful of the challenges and opportunities facing the sector, the Strategy sets out the following aims:

- Maximise the potential of our collections and culture;
- Strengthen connections between museums, people and places to inspire greater public participation, learning and well-being;
- Empower a diverse workforce to increase their potential for the benefit of the sector and beyond;
- Forge a sustainable future for sector organisations and encourage a culture of enterprise;
- Foster a culture of collaboration, innovation and ambition;
- Develop a global perspective using Scotland's collections and culture.

**The Historic Environment Strategy for Scotland** was approved in 2014. It underlines the fact that heritage is a factor of everyday life, giving a sense of place and identity, and contributing to well-being. These benefits can be realised through participation, education and tourism (and in the case of built heritage, through construction opportunities), but maximising on these depends on negotiating the following challenges:

- Addressing the challenging financial outlook;
- Ensuring that the impact on the historic environment, and its contribution to, public policy development is recognised;
- Meeting the impact of climate change;
- Meeting public expectations.

The Strategy's vision for Scotland's historic environment is that "it is understood and valued, cared for and protected, enjoyed and enhanced. It is the heart of a flourishing and sustainable Scotland and will be passed on with pride to benefit future generations."

In realising this vision through understanding, protecting and valuing the historic environment, the Strategy adopts the following overarching principles:

- that Scotland's historic environment is important, and that people value it because it enhances quality of life and economic well-being;
- to be ambitious: do more both to preserve and maintain the historic environment and to secure the many associated benefits;
- to face the challenges though having a clear view of the best value for money, through seeing the big picture in relation to issues such as climate change, and seeking opportunities to work and learn in partnership.

Its outcome is "to ensure that the cultural, social, environmental and economic value of Scotland's heritage makes a strong contribution to the well-being of the nation and its people.

**Accreditation** is a set of national standards for UK museums. To achieve these standards museums must meet published requirements in how they care for and document their collections, how they are governed and managed, and on the information and services they offer to their users. Under the new scheme launched in 2011, particular attention is also being paid to evidence of practice through the management of physical assets – buildings and collections – in terms of their environmental impact.

Accreditation is open to all museums that meet the 1998 Museum Association definition of a museum:

“Museums enable people to explore collections for inspiration, learning and enjoyment. They are institutions that collect, safeguard and make accessible artefacts and specimens, which they hold in trust for society.”

The area has three accredited museums: Callendar House, Kinneil Museum and the Museum of Scottish Railways.

The Accreditation standard has over the years kept pace with changing circumstances. Its most recent iteration places new emphasis on the need for contextual analysis in strategic planning and the adoption of environmental policies - increasingly a requirement for bids to funding bodies. These national aims and standards fit well with our local ambitions for a resilient and sustainable heritage sector which encompasses professional and voluntary organisations.

A similar accreditation scheme for the archives sector is in place and Falkirk Archives were one of the first services in the UK to receive accreditation, in 2014.

### **Visitor Attraction Standards**

VisitScotland operates a Quality Assurance Scheme which sets benchmark standards for the visitor experience at sites across Scotland. Star-ratings give an assurance to the visitor and other tourism operators about the quality they can expect of our venues. This scheme is complemented by the Green Tourism Business Scheme which, in recognition of the impact that tourism has on the environment, sets standards which require attractions to demonstrate how they are minimising their carbon footprint and how sustainability is built into their development plans.

### **GUIDING PRINCIPLES FOR THE 2015-18 PLAN**

In response to this context and to meet the vision and mission, delivering the Plan, set out below under the four themes of FCT's Culture and Sport Strategy, will be guided by four principles:

- To raise the outward profile of the Falkirk area through the richness of its heritage, encouraging visitors to the area and aiding the area's economy;
- To develop the well-being of the local community. In this, we will adopt the New Economics Foundation's and the Happy Museum Project's five ways to well-being: encouraging people to be active, to learn, to see the world differently, to connect with other people, their place and the environment, and to give;
- To encourage people to see local heritage in a larger framework – from a global perspective and as a preparation for the future – what we do now is the heritage of the future;
- To ensure that our aspirations, plans and delivery models are resilient, adaptable and sustainable.

## HERITAGE DELIVERY PLAN

**Participation** is a key to improving a sense of well-being and enriching the lives of people of all ages; we need to ensure co-ordinated structures are in place to enable participation from the 'grassroots'

Objective	Actions	Partners	Outcomes
<b>Programme</b> We will develop accessible programmes and events making full use of all available resources and facilities, ensuring equality of access to services for all, responding to community need, minimising duplication of effort, with the right partner doing the right thing and delivered within good practice guidelines	We will maximise understanding of the heritage environment by focusing on engagement with the key facilities and land/townscape projects under development as we enter the plan period: <ul style="list-style-type: none"> <li>• Callendar House and Park</li> <li>• Kinneil Estate</li> <li>• Falkirk THI</li> <li>• Helix (including visitor centre interpretation) and Canals</li> <li>• Antonine Wall World Heritage Site.</li> <li>• Inner Forth Landscape Initiative</li> <li>• Hippodrome</li> </ul>	FCT <i>heritage and libraries</i> , Local and national heritage sector organisations, Voluntary sector, Falkirk Council departments, Scottish Canals, Historic Scotland, Heritage Lottery Fund	By 2018, to be able to demonstrate clearly the contribution of heritage activity to the changing character and landscape of the local area, through public engagement with these projects.
	We will take advantage of national events, programmes, developments and wider sector initiatives to maximise heritage engagement, for example: <ul style="list-style-type: none"> <li>• World War 1 commemoration</li> <li>• Homecoming</li> <li>• John Muir Way</li> </ul>	FCT <i>heritage and libraries</i> , Local and national heritage sector organisations, Voluntary sector, Falkirk Council services, Scottish Natural Heritage, Heritage Lottery Fund	By end of 2015, to be able to demonstrate the development of new audiences and new awareness of heritage through the concentration of events in that year.
	We will continue to develop established regular local events which maximise engagement: <ul style="list-style-type: none"> <li>• Big Roman Week</li> <li>• Doors Open Days</li> <li>• Archaeology Month</li> <li>• Fruit and Nuts</li> <li>• Local History Week</li> </ul>	FCT <i>heritage and libraries</i> , Local and national heritage sector organisations, Voluntary sector, Falkirk Council services, Scottish Civic Trust, Forth Environment Link	By 2018, to be able to demonstrate the continued effectiveness of and support for the 'fixed points' in the annual events calendar.
	We will develop opportunities for people to pursue their personal interests and needs: <ul style="list-style-type: none"> <li>• Archive search and enquiry facilities</li> <li>• On-line availability of material (eg development of SMR/HER on-line)</li> <li>• Resources held by voluntary bodies</li> </ul>	FCT <i>heritage and libraries</i> , Local and national heritage sector organisations, Voluntary sector, Falkirk Council services, SRPS.	By 2018, to have developed a co-ordinated information resource to connect people with the range of material available for personal historical research.

	<p>We develop opportunities for heritage engagement through tourism by developing, promoting, and improving signage to the areas attractions:</p> <ul style="list-style-type: none"> <li>• Callendar House and Park</li> <li>• Kinneil Museum and Estate</li> <li>• SRPS</li> <li>• Falkirk Town Centre (through THI development)</li> <li>• Helix (and Canals)</li> <li>• Antonine Wall</li> <li>• Hippodrome</li> <li>• Pineapple</li> </ul>	FCT <i>heritage, parks</i> and Helix, Local and national heritage sector organisations, Voluntary sector, Falkirk Council services	By 2018, increased visitor numbers for each of these sites.
	<p>In the light of demographic forecasts and known audience for heritage, we will ensure that opportunities for older people to enjoy and participate in heritage activity by</p> <ul style="list-style-type: none"> <li>• Supplying programmes at FCT venues which suit the tastes of this audience, especially talks programmes, and development of outreach resources (loan boxes)</li> <li>• Encourage participation through volunteer work with local organisations or volunteer groups</li> </ul>	FCT <i>heritage and libraries</i> , Voluntary sector.	By 2018, to demonstrate a range of programmes and opportunities for older people.
<p><b>Children and Young people</b></p> <p>We will establish clear development pathways between schools and colleges and the charitable and voluntary sector to give children and young people heritage experiences that enhance the curriculum and their overall way of life</p>	<p>To develop programmes of activity which meet the requirements of citizenship, environmental and social responsibility and well-being inherent in Curriculum for Excellence.</p> <p>To promote the opportunities for all heritage providers across the community to engage with schools.</p> <p>Existing schools programmes provided by FCT are highly valued by schools; we will keep their continued effectiveness under review through feedback from teachers. New programmes under development by FCT in 2015 are</p> <ul style="list-style-type: none"> <li>• World War Two</li> <li>• Callendar House</li> <li>• Falkirk Town Centre</li> </ul>	FCT FC Education Service	<p>By 2018</p> <ul style="list-style-type: none"> <li>• for FCT's heritage service to have contributed, over 5 years, to the heritage understanding of 25000 school pupils.</li> <li>• For FCT to have developed with the school community outcomes which demonstrate contribution to Curriculum for Excellence.</li> <li>• To understand, celebrate and promote the input of the voluntary sector to school-based learning in local communities</li> </ul>

	<ul style="list-style-type: none"> <li>• Cultivating Earth</li> </ul> <p>We will develop new programmes and one-off activities in line with changing demand.</p>		
	To develop family-based engagement with heritage.	FCT SRPS Voluntary sector	For FCT to build on the success of family-based activity at Callendar House developed during 2012/13 and by 2018, to have maintained or improved on the c.2000 new customers created as a result of this activity
	To seek ways to engage with young adults (16-24), building on learning from the HLF access project 2003-6 and My Future's in Falkirk.	FCT <i>heritage and arts</i> , Falkirk Council Education Service, Forth Valley College, Employment and Training Unit.	By 2018, to demonstrate involvement in the new key local development projects – Callendar House and Park, Kinneil, Falkirk THI, Helix.
<b>Collaboration</b> We will develop mechanisms to improve joint working and co-ordinated programming and work together to develop our skill base – leadership, coaching, volunteering – to expand memberships, increase employment opportunities, raise equality of performance, breadth of participation and ensure longer term organisational sustainability.	Develop collaborations between those bodies indicated above under 'partners' in generating participation.	See partners lists	
	Develop collaboration with and amongst stakeholders to improve joint working and shared knowledge.	FCT Voluntary sector	By 2015, to create a mechanism – annual meeting or other network – to monitor progress on the Plan.
	Take opportunities to create collaboration with projects and groups in the community not normally associated with heritage activity, and respond to changes in motivation for engaging with heritage, including increasing heritage perspectives on changes driven by environmental priorities.	FCT	By 2018, to undertake mapping of newly developing adopters of heritage activity and evidence of change in the drivers for engagement.
	We will review the human resource available for delivering heritage activity, beginning with FCT's assessment of its capacity against revenue budget reduction 2014-17	FCT	By 2017, to produce a structure which achieves an effective balance between FCT's management of its internal resources and of its partnerships

**Motivation** *it is people who bring heritage to life, Falkirk has many great heritage opportunities; we need to connect with people to inspire and motivate them to take part in opportunities which are relevant, accessible, and affordable and meet their expectations*

Objective	Actions	Partners	Outcomes
<b>Inspiration</b> We will work together to inspire a new generation to participate, developing	Ensure that local activity is supported by standards of skill and knowledge recognised by the heritage sector nationally.	FCT SRPS Voluntary sector National bodies	By 2018, FCT museums and archives units take the lead through linking professional development with the programmes and priorities of national lead

and promoting role models to communicate, influence and shape positive behaviour to improve lifestyles and well-being.		responsible for setting standards and priorities in museums, archives and heritage.	bodies.
	To inspire people to rethink attitudes to the environment through heritage engagement.	FCT Voluntary sector, Falkirk Council Development Services, Central Scotland Forest, Central Scotland Green Network.	By 2018 to demonstrate this contribution through <ul style="list-style-type: none"> <li>• Sustainable facilities management</li> <li>• 'Green' messages incorporated in programmes of activity</li> <li>• 'Green' messages incorporated into the major heritage developments carried out in 2015-18.</li> <li>• Closer integration between organisations involved with human and natural heritage.</li> </ul>
	We will increase the number of volunteering opportunities and support	FCT, SRPS, Voluntary sector, Community Learning.	By 2018, voluntary work in the local heritage sector can be demonstrated through contributions to FCT activity and programmes, membership of local voluntary heritage groups, and engagement with heritage work by those in other areas of community volunteer activity. This will be captured through proactive links with the voluntary sector.
<b>Marketing</b> We will use market intelligence and customer knowledge, tailor marketing strategies to generate income, target effectively and develop new audiences based on knowing who all the delivery partners' audiences are.	To maximise existing known audiences for heritage: through developing knowledge of them and targeting activity: <ul style="list-style-type: none"> <li>• personal users</li> <li>• tourists</li> <li>• older people</li> <li>• families</li> <li>• schools</li> <li>• 18-24 year olds</li> <li>• active volunteers</li> </ul>	FCT Visit Falkirk VisitScotland Education sector Voluntary sector	By 2015, to have a marketing strategy for heritage in place, which will contribute to heritage provision and engagement which, by 2018, will be resilient, adaptable and sustainable.
	To monitor changes in existing audiences, identify new audiences, changes in methods of engagement, changing motivations for participation and engagement, and plan for new delivery activity.		

	To gather audience intelligence through improved deployment and training of front-line staff and participants.		
<b>Fairness</b> We will address challenges in respect of the 'value' relative to the 'cost' of activities to ensure that services are cost-effectively delivered and that subsidy is accurately targeted at individuals based on need.	Abide by and promote the ethical standards which underpin engagement and collections management.  Work with disadvantaged and traditional non-users of heritage services through outreach and volunteer programmes.	FCT SRPS Voluntary sector Community learning.	By 2018, FCT to demonstrate a range of targeted activity with its community learning partners.



**Venues and collections:** *venues and museum and archive collections provide focal points for participation and community cohesion, attract visitors and enhance the image of the area; we need to ensure they are 'fit for purpose', meet expectations and are of a sufficient quality to attract customers.*

Objective	Actions	Partners	Outcomes
<b>Spread</b> We will identify opportunities for rationalising our venues and collections, identify co-location opportunities with partners and balance the benefits of local access with financial sustainability of centralised provision and making the best use of existing provision wherever possible	The Trust's input to heritage provision in the town will be assessed in the light of existing work by Grangemouth Heritage Trust, identification of other potential partners, and progress of proposals for town centre regeneration.	Town Centre Management, Economic Development, Grangemouth Heritage Trust, other development programmes to be identified.	By 2017, a plan of action appropriate to the scale of town centre regeneration plans.
	Build on the increased visibility of collections through the installation of displays at Forth Valley Hospital in Larbert and design and develop an ongoing programme	FCT NHSFV Other regional collections-based partners	Continue to develop and deliver an exhibition programme at FVRH hospital in partnership with other regional collections organisations
	Develop new opportunities for access to the Trust's collections beyond in-house exhibition programmes by <ul style="list-style-type: none"> <li>• Creating opportunities for display at venues other than main sites</li> <li>• Creating opportunities for relevant groups to explore the collections at the museum store</li> <li>• Build on the experience of Kinneil Museum redisplay project to enable local groups to create exhibitions at main sites</li> <li>• Create opportunities for relevant groups to use collections with their communities.</li> <li>• To develop new audiences for loan boxes, building on experience of working with care sector.</li> <li>• Create opportunities for connecting exhibition and collections-access programmes to THI project.</li> </ul>	FCT <i>heritage and libraries</i> , Voluntary heritage groups, Schools, FV College, Care sector, Falkirk THI.	For 2015/16, to review effectiveness of liaison and contact with partner groups, and take up of opportunities created.
	Explore feasibility for development of Kinneil House as visitor attraction or other potential use	FCT Historic Scotland Falkirk Council Friends of Kinneil	By 2015, to determine and agree a feasible solution for the future of Kinneil House within the context of a Kinneil estate development plan.

<b>Investment</b> We will plan and prioritise future investments to make best use of our limited available finances to attract and lever in additional funds	Complete refurbish of the ground floor of Kinneil Museum, renewing displays to present a clearer narrative of the Bo'ness story, the storytelling potential of objects and the significance of the site as part of a World Heritage Site.	FCT Friends of Kinneil	Project to be completed by March 2015.
	Callendar House transformation project is flagship and priority development for the plan period 2015-18. Key features of the project: <ul style="list-style-type: none"> <li>• Create a new identity and vision for the site</li> <li>• Develop stronger linkages between Park and House – natural and human heritage</li> <li>• Give new significance to local collections by depicting them from a global perspective</li> <li>• Deploy new display techniques through use of art to interpret heritage material</li> <li>• Uncover and discover more of the historic features of House and Park</li> </ul>	FCT <i>heritage, arts, parks/sustainability</i> , FC Development Services, Forestry Commission, Callendar Estates, HLF.	Establish vision and development plan by 2016.
	We will explore options for new storage facilities for archive and museum collections ensuring they meet national standards for long-term collections care.	FCT <i>heritage and libraries</i> FC Development Services Historic Scotland HLF MGS National Records of Scotland	By 2015, to have undertaken needs analysis for housing museums and archives collections, and link future storage needs of museum collections with disposal process from 2016 onwards.

<b>Quality</b> We will prevent the decline in quality of existing heritage venues and tackle asset management issues in a planned way across all sites including a critical review and appraisal of asset performance in terms of condition suitability and utilisation.	FCT will work towards 'green' management of its buildings, taking a lead with Callendar House by: <ul style="list-style-type: none"> <li>• Developing the House's operation according to standards required to achieve Green Tourism award</li> <li>• Developing the ability to monitor energy consumption and to demonstrate increasing energy efficiency.</li> </ul>	FCT FC Development Services	To achieve Gold in Green Tourism award for Callendar House by 2016.
	FCT will maintain and, where feasible, improve on the VisitScotland Quality Assurance Scheme status for Callendar House and Kinneil Museum	FCT	By 2017, to maintain 5 star status for Callendar House.
	FCT museum service to develop a contemporary collecting strand to increase relevance of collections of changing community and audience	FCT	Plan identifying main collecting strands produced by April 2015.
	Develop a methodology for collecting 'born-digital' archive material, including acquiring the technology and the knowledge to manage the process effectively.	FCT, RCAHMS, National Records of Scotland, National Library of Scotland	By 2018, to be able to add verifiable and accessible documents from the Council to the Archive.
	We will continue to develop on-line access to collections, archives, other resources and information.	FCT <i>heritage and libraries</i> Voluntary sector	HER (SMR) to be on-line by 2015.
	To encourage the creation/development of collections disposal policies: active disposal is an ethical requirement of the UK museums sector to ensure that collections are managed sustainably.	FCT	FCT to complete inventory of its collection by 2015, produce disposal plan 2016, implement plan 2017 onwards.
	To further develop Cultivating Earth as an exemplar of the link between heritage engagement and environmental responsibility, and heritage engagement and social responsibility	FCT Forth Environment Link, Caledonia Clubhouse, External horticultural advice	By 2015, to import the learning from managing the space into plans for Callendar House and Park.

**Partnership** is vital for ensuring our competitiveness and providing new opportunities for individuals, communities and visitors, in these challenging times we need to make sure our forward plans are aligned to partner expectations

Objective	Actions	Partners	Outcomes
<b>Cross cutting themes</b> We will ensure that heritage services contribute to the attainment of local outcomes as outlined in the Strategic Community Plan and Single Outcome Agreement	SCP outcome – Economy. Develop heritage input to developing tourism to the area.	Tourism Strategy Partnership	Increase tourism to the Falkirk area by contributing to the emerging Tourism Strategy
	SCP outcomes – Learning Health, Fairness, Society, Sustainability.	FCT, voluntary sector, SRPS	Contribute to or develop new partnerships to enhance heritage input to achieving outcomes.
	FCT will support the protection of the historic environment through the provision of archaeological advice to the planning process, through asset management and programme delivery.	FCT FC Development Services	FCT recognised as taking the lead through its management of buildings, landscapes, collections and delivery of programmes, and through its advice to Falkirk Council.
	FCT will support the standards required in records management by Falkirk Council through provision of relevant archival input.	FC Chief Executive's Office	Maintain compliance with the archive provisions under the Public Records Scotland Act and by 2018 roll out relevant developments in records management within FCT.
	FCT will advise Falkirk Council on SRPS's <ul style="list-style-type: none"> <li>• Success as visitor attraction</li> <li>• Contribution to the local economy</li> <li>• Employment of staff and generation of volunteer participation</li> </ul>	FCT, Falkirk Council Chief Executive's Office and Development Services	By 2015, renewal of Joint Working Agreement between SRPS and Falkirk Council.
<b>National engagement</b> We will engage with national and regional agencies to seek inward investment in the area to deliver a range of innovative projects	Major projects for the plan period: <ul style="list-style-type: none"> <li>• Callendar House and Park development</li> <li>• Kinneil Museum and Estate development</li> <li>• Falkirk THI</li> <li>• Helix</li> <li>• Antonine Wall World Heritage Site</li> </ul>	Key strategic partners: FCT, Falkirk Council, Historic Scotland, Heritage Lottery Fund, Central Scotland Forest Trust, Scottish Canals.	Successful creation/development of each project.
<b>National support</b> We will contribute to developing national strategies and influence policymaking and will	We will work with: Museums Galleries Scotland in relation to the delivery of the National Strategy for Museums in Scotland, and maintenance of museum standards.	FCT, Falkirk Council, SRPS, voluntary sector.	To demonstrate the contribution of individual members of FCT staff and local professional and volunteer practitioners to the development of policy and practice by these national lead bodies.

support national strategy delivery through locally co-ordinated action	Historic Environment Scotland (replacement body for Historic Scotland and RCAHMS) in relation to the management of listed buildings in the Trust's portfolio and the care and engagement with the historic built environment.		
	National Records of Scotland and Scottish Council on Archives in relation to the standards of archives care.		
	Museums Association in relation to museums operational standards and professional development.		

Feedback	Comment
<b>Cllr Adrian Mahoney</b> <ul style="list-style-type: none"> <li>Ensure the document takes account of recent local and national policy changes such as the approval of the Tourism Strategy for the Falkirk Council area and the publication of the Historic Environment Strategy for Scotland</li> </ul>	<i>Plan amended</i>
<b>Cllr Robert Spears</b> <ul style="list-style-type: none"> <li>Requested the detailed Heritage plans for Grangemouth</li> </ul>	<i>Projects specific to Grangemouth highlighted in the report and sent to Cllr Spears. Clarification that the Heritage Delivery Plan is a strategic plan for the whole area and, as such, there are many actions that will have an impact on Grangemouth as well as other communities across the area. Annual updates to members will include specific examples of how the Plan has impact in specific communities</i>
<b>Pete Reid, Manager (Growth &amp; Investment) Falkirk Council Development Services</b> <ul style="list-style-type: none"> <li>In Econ Dev input no mention of TC Regen particularly Denny - this will be a big investment and opportunity to reflect heritage in new plans and library facility building on extensive consultation work with community around the new town sq.</li> <li>Other example of partner working is support/collaborative working with Silent Film Festival in Hippodrome and opportunity to engage local businesses.</li> <li>Maybe make mention of previous work in town centres e.g. Stenhousemuir and the cows sculpture facilitated and delivered FCT (formerly Community Services). Just another example of embedding Heritage into town centre regeneration but may be too insignificant for this report.</li> <li>In action plan Motivation under section marketing suggest adding in VisitFalkirk as well as VisitScotland in terms of tourist outreach.</li> <li>In action plan Partnership under section cross cutting themes economic this should refer to Tourism Strategy Partnership rather than Tourism Group. I also note in this section their continued role in 'advising' on SRPS outputs and performance</li> </ul>	<i>Plan amended (p.5)</i>  <i>To be covered in Arts Delivery Plan;</i>  <i>Plan amended (p.5)</i>  <i>Plan amended (p.16)</i>  <i>Plan amended (p.21)</i>

**FALKIRK COUNCIL**

**Subject: PROPOSAL TO DESIGNATE ZETLAND PARK AS A “WORLD WAR ONE CENTENARY FIELD”.**  
**Meeting: EXECUTIVE**  
**Date: 19<sup>TH</sup> MAY 2015**  
**Author: DIRECTOR OF CORPORATE & NEIGHBOURHOOD SERVICES**

**1 INTRODUCTION**

- 1.1 The purpose of this report is to consider a request for Falkirk Council to support and commit to a nationwide initiative led by Fields in Trust in conjunction with the British Legion and Poppy Scotland.
- 1.2 The Initiative is to provide legal protection to at least one green space in every Local Authority area in Scotland, England, Wales and Northern Ireland in commemoration of the sacrifice made by all those who lost their lives in World War One. This initiative is endorsed by Fields in Trust patron HM The Queen and their president HRH The Duke of Cambridge. The protected green spaces are to be known as Centenary Fields.
- 1.3 Zetland Park, Grangemouth meets all of the criteria for a Fields in Trust Centenary Field.

**2 BACKGROUND.**

- 2.1 The prime focus of Fields in Trust is to safeguard valuable green spaces (Fields as they are known), ensuring their protection and use for future generations. They are protected in perpetuity by a legal document known as a Deed of Dedication.
- 2.2 The legal protection of these green spaces follows the same format of the King George V Fields and the Queen Elizabeth Fields, which were established in celebration of the Queen’s Diamond Jubilee in 2012. The Queen Elizabeth Fields were also linked to The Olympic Games in London in 2012 and to The Commonwealth Games in Glasgow in 2014. This particular designation was approved by members at the 4<sup>th</sup> September 2012 Policy and Resources Committee.
- 2.3 Safeguarding sites through the Centenary Fields programme compliments these other Fields in Trust initiatives, and ensures that more parks and other valuable green spaces will be protected for future generations to enjoy.

The existing Queen Elizabeth Fields are:

- |                              |             |
|------------------------------|-------------|
| • Sunnyside Playing Fields – | Falkirk     |
| • Gairdoch Park –            | Carronshore |
| • Duncan Stewart Park –      | Bonnybridge |
| • Avonbridge Public Park –   | Avonbridge  |
| • Herbertshire Gala Park –   | Denny       |
| • Douglas Park –             | Bo'ness     |

The existing King George V Fields are:

- |                        |               |
|------------------------|---------------|
| • Overton Park-        | Redding       |
| • Crownest Park -      | Stenhousemuir |
| • McLauren Park        | Stenhousemuir |
| • Findlay Russell Park | Stenhousemuir |
| • Stenhouse Park       | Stenhousemuir |
| • Stewartfield Park    | Larbert       |

- 2:4 This Fields in Trust initiative aims to establish a network of protected Centenary Fields throughout the UK by November 2018 at the latest, supported by signed Deeds of Dedication. Any Field which is not legally signed by this time will not become a Centenary Field.

### **3 CENTENARY FIELDS CRITERIA**

- 3:1 The criteria for a Centenary Field are clearly defined by Fields in Trust. The prime requirement is that it should be a green space such as a War Memorial park, a recreational ground, a memorial garden, a park, or a recreational space that contains a War Memorial.
- 3:2 It is now proposed to nominate the older part of Zetland Park as Falkirk Council's Centenary Field. The Park has an impressive War Memorial, together with the expansive recreation grounds and play facilities. The Park meets all of the prime criteria to become a Centenary Field. There are no other green spaces in Grangemouth which are protected by Friends in Trust designations.

### **5 LEGAL IMPLICATIONS AND COSTS INCURRED**

- 5.1 Designating a green space as a Centenary Field ensures that the land will be protected in perpetuity as a green space and ensures that the asset cannot be sold for commercial gain.
- 5.2 Costs incurred will be modest and will be accommodated within Corporate & Neighbourhood Services Estate Management budget and includes the following:
- Legal costs incurred with agreeing to the Deed.
  - The costs of installing a commemorative plaque (a plaque is provided free of charge by Fields in Trust).
  - Registering the resulting restrictions with the land registry.



## **6 IMPLICATIONS FOR ZETLAND PARK**

- 6.1 Zetland Park is one of the largest Urban Parks in the Falkirk Council area. The war memorial and its landscape setting are recognised as an important part of Zetland Park.
- 6.2 The northern parts of Zetland Park were in existence before World War Two. The Park was extended in the 1950's at about the same time as the construction of new housing at Kingseat Avenue, and this extension included the provision of four playing fields, together with changing facilities. The Park was also extended to an area west of the Grange River, and this now includes the Leisure Centre and car parking. It is now proposed that the Centenary Field designation would only apply to the older parts of the park which were in place prior to World War Two.
- 6.3 Designation as a Centenary Field would not only protect the historic and conservation value of Zetland Park but it would also strengthen the case to attract external funding.
- 6.4 Comments were invited from stakeholders including The Friends of Zetland Park, Falkirk Community Trust and Local Ward Member's, comments are shown in Appendix 2 (attached).

## **7 RECOMMENDATIONS**

**It is recommended that The Executive Committee:**

- 7:1 **Supports the Fields in Trust "Centenary Field" Initiative; and**
- 7:2 **Agrees that the older part of Zetland Park should become Falkirk Council's nominated Centenary Field (Appendix 1) and accepts the legal protection that this incurs.**

.....  
**DIRECTOR OF CORPORATE & NEIGHBOURHOOD SERVICES**

Date: 29 April 2015

Ref: AAP190515 – Proposal to Designate Zetland Park as a "World War 1 Centenary Field

Contact Officers: Mike Joyce, Estates Development Officer ext 4605  
Wraight Shepherd, Projects and Development Co-ordinator ext 4617

### **LIST OF BACKGROUND PAPERS**

Report to Policy and Resources Committee  
APPENDIX 1 Plan of Zetland Park in 1944  
APPENDIX 2 Response to Consultation

September 4<sup>th</sup> 2012.  
(see below)  
(see below)

Plan of Zetland Park in 1944  
showing the proposed area for Fields in Trust Status



## RESPONSE TO CONSULTATION

**from The Friends of Zetland Park.**

9<sup>th</sup> April 2015

Dear Wraight,

The response of Friends of Zetland to the possibility of Falkirk Council applying for Fields of Trust -Commemorative Field status for the pre-war section of Zetland Park is completely supportive and should be received with honour by the town.

I should however say that FoZP are equally concerned about the retention of the remaining section of the park, bounded by Kingseat Avenue, Bowhouse Road and the pathway link from the water pumping station to Abbotsgrange Road, for solely recreational use.

FoZP are therefore seeking a legal undertaking from Falkirk Council, which will survive changes to the political colour of the Council from time to time, which will preserve this area for nothing other than recreational use in whatever form it ultimately takes. The loss of significant Green Space by the creation of the Asda Distribution Centre and the current plans to locate a new school for Carrongrange on the grounds of Moray School, mean that retention of the total current boundary of Zetland Park has to be protected from other, non-recreational development possibilities.

FoZP look forward with interest to these being obtained and confirm they will play whatever role necessary in helping you procure them.

Yours sincerely,

Tom Brown

FoZP-Vice Chairman

**from Falkirk Community Trust**

24<sup>th</sup> April 2015

Falkirk Community Trust would support the application for Zetland Park to obtain FIT status, where this application and subsequent FIT approval did not materially affect the lease agreement for the activity areas within the Park that FCT currently hold with Falkirk Council. The development and improvement of the Park and its environs would be broadly welcomed by FCT, and we would be pleased to work in partnership with FIT and Falkirk Council to support the implementation of the improvements where agreed.

Paul Finnie | Sport & Recreation Manager

Falkirk Community Trust

Tel 01324 590922

**From Local Ward Member, Allyson Black**

10<sup>th</sup> April 2015

Wraight,

Yes, I support this proposal.

Great news

Thanks,

Allyson Black



**FALKIRK COUNCIL**

**Subject: WELFARE REFORM UPDATE**  
**Meeting: EXECUTIVE**  
**Date: 19<sup>th</sup> MAY 2015**  
**Author: DIRECTOR OF CORPORATE & NEIGHBOURHOOD SERVICES**

**1. INTRODUCTION**

- 1.1 This report provides Members with an update on the Welfare Reform changes and what is being done to support people affected by these changes. It includes an update on Universal Credit, the use of Discretionary Housing Payments and Personal Independence Payments.
- 1.2 Once all the changes are rolled out, the impact of Welfare Reform on the Falkirk Council area is estimated to be £46m per year. It is generally accepted that approximately 40% of the impact of the Welfare Reform changes has been delivered so far, with the biggest impact expected to happen in 2015/16.

**2. UNIVERSAL CREDIT**

- 2.1 The Department of Work and Pensions (DWP) will introduce Universal Credit to the Falkirk Council area as part of the second tranche of their national roll out. From 25<sup>th</sup> May 2015 new single claimants who would previously have claimed Job Seekers Allowance will be eligible to claim Universal Credit. There are a number of criteria that exclude claimants from claiming Universal Credit, most notably those who have dependent children, are residing in temporary accommodation, own their own home or are self employed. These claimants would then claim Job Seekers Allowance. Roll out to more complex claims is not expected until at least May 2016.
- 2.2 Universal Credit aims to make work pay, with take home pay being topped up by Universal Credit payments such that a claimant is better off for every additional hour they work. It should make it easier for individuals to take up work, particularly short term or irregular work as their claim will remain open for 6 months, making it easier to restart the benefit payments should the work come to an end.
- 2.3 Key implications for an individual claiming Universal Credit are that their benefit will be paid monthly and will include an element for housing costs which they are expected to pay to their landlord.
- 2.4 The Department of Work and Pensions (DWP) estimate that they expect to receive 1458 Universal Credit claims at Falkirk and Grangemouth Job Centres between 25<sup>th</sup> May 2015 and 31<sup>st</sup> March 2016.

- 2.5 Claimants residing in postcodes that are shared with West Lothian Council will not be eligible to claim Universal Credit until it is launched across West Lothian, sometime between September and November 2015. This applies to FK1 2\*\*, EH49 6\*\* and EH49 7\*\* postcodes.

***Support Required by Department of Work and Pensions***

- 2.6 The Department of Work and Pensions (DWP) would like Falkirk Council to partner with them to support the roll out of Universal Credit. They are looking for support in a number of areas and are willing to provide some funding towards the cost of providing support. Provision of this support would be detailed as part of a Delivery Partnership Agreement between DWP and Falkirk Council which would be signed by the Chief Executive on behalf of the Council.
- 2.7 DWP are looking for Councils to provide support in the following areas:
- Manual Processing for Local Council Tax Reduction Scheme (until October 2015)
  - Supporting the DWP Universal Credit Service Centre staff around housing cost issues
  - Supporting claimants to make an online claim for Universal Credit
  - Provision of Personal Budgeting Support to claimants
- 2.8 As part of the Delivery Partnership Agreement, DWP will provide funding to Falkirk Council to cover the costs of the support provided. Funding will be provided on the basis of the additional resources required to provide support. An hourly rate will be agreed for each type of support and DWP will pay for resources as follows:
- Provision of online supported access to 5% of claimants at one hour per claim
  - Provision of straightforward budgeting advice to 3.75% of claimants at two hours per claim
  - Provision of complex budgeting advice to 1.25% of claimants at six hours per claim
  - Manual processing for Local Council Tax Reduction Scheme for 20% of claimants at one hour per claim
  - Support for Universal Credit Service Centre for 20% of claimants at one hour per claim
- 2.9 DWP have confirmed that they will pay for support based on the estimated figures that they have provided. If take up of support exceeds these figures they will revisit the amount of funding that will be provided. If take up of support is lower than the estimated figures, funding will not be clawed back from the local authority.
- 2.10 In addition to the funding for the specific support detailed above, DWP are willing to provide some funding towards management resources involved in overseeing support and reporting. Discussion with other councils indicate that DWP are willing to cover management time of approximately 0.5 FTE for 6 months followed by 0.31 FTE for a further 4 months.

- 2.11 DWP have also indicated that they are willing to provide up to £5k of funding for one off costs incurred in supporting the roll out of Universal Credit, against proof of expenditure, for example costs associated with producing materials such as information leaflets to support customers and/or pre-printed envelopes for customers to submit proofs to the DWP Service Centre.
- 2.12 Whilst discussions are underway to agree the hourly rates and confirm the amount of funding available from DWP in return for provision of support, it is estimated that Falkirk Council will receive approximately £52,000 in return for providing support to DWP.
- 2.13 COSLA are not aware of any Councils where Universal Credit has been introduced which have not entered into a Delivery Partnership Agreement with the DWP; however it is uncertain how much the agreements vary between different councils.
- 2.14 Experience from other areas that have gone live with Universal Credit suggests that the number of claimants is likely to be lower than estimated. Additionally take up of support for personal budgeting and online claims are also likely to be lower than estimated.

***Proposal for Delivery of Online Support***

- 2.15 Currently both Community Learning and Development (CLD) and the Community Trust Library Service provide drop in supported computer access. Drop in access is provided by CLD's Work Clubs with support available from tutors and volunteers. Within the Library Service access to computers is provided on a drop in basis with support provided by library staff. Anecdotal evidence from the library service suggests that at least 70% of computer use relates to job seekers completing JSA applications or using Universal Job Match.
- 2.16 Additionally both CLD and library services offer classes on basic IT skills; CLD via their Fast Track provision, accessible by referral, and Libraries through more informal classes. However it is thought that the demographic who will initially require support to make a claim for Universal Credit are unlikely to choose to access support in this format.
- 2.17 It is proposed that support for online Universal Credit applications is made available on the same basis via both Community Learning and Development and the Library Service.

***Proposal for Delivery of Personal Budgeting Support***

- 2.18 Within Falkirk Council elements of money advice are delivered within a number of services including Housing, Social Work and Education. At present no service specifically provides one to one budgeting support as a stand alone service.
- 2.19 The number of people expected to take up personal budgeting support is very low. Based on take up rates from other areas, between 14 and 29 Universal Credit claimants are likely to take up personal budgeting support between 25<sup>th</sup> May 2015 and 31<sup>st</sup> March 2016.

- 2.20 As an interim solution it is proposed that personal budgeting support is provided by debt advisors within Community Advice Services. This team have the skills and expertise to provide the support required and have been involved in briefing other services on money advice.

It is likely that some of the Universal Credit claimants who take up Personal Budgeting Support would benefit from further support around debt or welfare benefits advice and this solution allows staff to encourage claimants to take up that additional support.

### ***Training on Universal Credit***

- 2.21 Work is underway across the Council staff and partner organisations, in partnership with DWP, to look at training requirements associated with the roll out of Universal Credit. Training requirements have been split into the following categories:

- General awareness training – applicable to staff across the Council and partners who come into contact with customers who might be eligible for universal credit. Investigations are underway to see if it is possible to adopt an e-learning package currently being developed by another Scottish Council. Additionally it is proposed that a small number of face to face general awareness sessions will be offered.
- Technical training on benefit claim procedures for Universal Credit, Council Tax Reduction and Housing Benefit – applicable for Finance and Income Maximisation staff
- Online application process – applicable to staff providing support to those making an online application

### ***Universal Credit Waiting Period***

- 2.22 Universal Credit is paid monthly in arrears. The first payment is made approximately 7 days after the end of the first assessment period, meaning that applicants have to wait around 1 month and 7 days from date of application to receiving first payment.
- 2.23 In addition to the above, it is proposed that there will be a 7 day waiting time at the start of an application for Universal Credit before the individual is eligible for any benefit. This was due to be introduced in April 2015, however it was recently announced that the introduction of the waiting period has been delayed until 1<sup>st</sup> July 2015.
- 2.24 Once introduced the waiting period will increase the period of time from application to receipt of first payment to 1 month and 14 days, at which point the claimant will receive a payment of 1 months benefit. The 7 day waiting time is in line with the waiting time for JSA and ESA which was increased from 3 days to 7 days on 27<sup>th</sup> October 2014. However unlike JSA and ESA, the Universal Credit waiting time will include the proportion of benefit that relates to housing and child costs.
- 2.25 This is likely to have significant implications on an individual's ability to manage their money, to buy food, electricity and gas and to pay their rent. Individuals can apply to the DWP for a budgeting advance however these are restricted to those on the lowest income and with the ability to pay back the loan. This is therefore likely to impact on rent collection and to increase demand for Scottish Welfare Fund Crisis Grants and social work Section 12 and 22 payments.



### 3. DISCRETIONARY HOUSING PAYMENTS

#### *2014/2015 Funding*

- 3.1 The Department of Work and Pensions (DWP) and Scottish Government (SG) provided funding to Falkirk Council in 2014/2015 of £1,213,695 with a further reserve being held back until May 2015 when Local Authorities can apply to the SG for reimbursement.
- 3.2 Scottish Government provided the additional funding to enable Local Authorities to mitigate the impact of the Size Criteria restrictions for social sector tenants. The Housing Benefit loss for Council tenants and RSL tenants was £1.345m.
- 3.3 The spend as at 31<sup>st</sup> March 2015 was -.

Size Criteria	£1,278,924.64 – 96% of the spend
Non Size Criteria	£56,349.68 – 4% of the spend
	-----
Total	£1,335,274.32
	=====

- 3.4 This means that as at 31<sup>st</sup> March 2015, the budget was overspent by £121,579.32.
- 3.5 Through a concentrated and resource intensive targeted DHP take up campaign, 95% mitigation of Size Criteria has been achieved for those council and RSL tenants who demonstrated intent to claim by the end of March.

#### *2015/2016 Funding*

- 3.6 Scottish Government has confirmed the additional funding they will provide for DHP by adding an additional £35m to the £13.3m already allocated by DWP for 2015/2016. Similar to the situation in 2014/2015, Scottish Government have allocated 80% of the estimated need and following the publication of the DWP statistics in May 2016, Scottish Government will make further payments to each Local Authority to ensure they receive the funding needed to cover their spending for 2015/2016 with a clear message that “bedroom tax” is to be fully mitigated.
- 3.7 Falkirk Council’s funding is as follows:-
- |                  |            |
|------------------|------------|
| DWP contribution | £ 257,649  |
| SG contribution  | £ 927,145  |
|                  | -----      |
| Total            | £1,184,794 |
|                  | =====      |
- 3.8 The team have processed 2629 DHP awards for 2015/2016 (including 2014/15 claims ‘rolled forward’) totalling £1,281,615.87.
- 3.9 This puts Falkirk Council in the same position as 2014/2015 where more than the allocated budget has already been committed but this can be claimed back in May 2016.

### ***Non-Size criteria cases***

- 3.10 Falkirk Council is continuing to assess claims from tenants who are not affected by Size Criteria and applying the financial test in line with the current policy. These cases are paid in “exceptional” circumstances and only for short periods, i.e. 26 weeks maximum in one financial year.
- 3.11 It is worth noting that a recent Court Judgement regarding an appeal against the inclusion of Disability related benefits in the assessment of income was successful. The policy will therefore need to be reviewed in line with that decision.

## **4. PERSONAL INDEPENDENCE PAYMENTS**

- 4.1 The roll out of Personal Independence Payments (PIP) was extended in the FK post code area from 30<sup>th</sup> March 2015 to existing Disability Living Allowance (DLA) claimants who are being reassessed including:
- those with fixed period DLA awards coming up for renewal;
  - children who turn 16 years old on or after 7 October 2013 (unless they have been awarded DLA under the Special Rules for terminally ill people);
  - those where there is a report of a change in the DLA claimant’s health condition or disability;
  - existing DLA claimants aged 16 to 64 who wish to make a PIP claim.
- 4.2 This introduction of PIP for DLA reassessments was previously rolled out to EH postcodes including those in the Falkirk Council area in January 2014. Existing DLA claimants with long term awards will be invited to apply for PIP from October 2015 with the aim of completing the transfer of all working age DLA claimants to PIP by late 2017.

## **5. RECOMMENDATIONS**

**It is recommended that the Executive:**

- 5.1 **In relation to the roll out of Universal Credit:**
- **Agree that the Council should enter into a Delivery Partnership Agreement with the Department of Work and Pensions in support of the roll out of Universal Credit; and**
  - **Consider the need for a Member specific awareness session on Universal Credit.**
- 5.2 **In relation to Discretionary Housing Payments:**
- **Agree that the policy will need to be reviewed in respect of Disability Benefits not being included as income in the non-size criteria cases where a financial assessment is carried out.**

.....  
**DIRECTOR OF CORPORATE & NEIGHBOURHOOD SERVICES**

Date: 31 April 2015

Ref: ABB280415SB - Welfare Reform Update

Contact Name: Sally Buchanan, Extension 6189

## LIST OF BACKGROUND PAPERS

1. [http://www.scottish.parliament.uk/S4\\_Welfare\\_Reform\\_Committee/Reports/wrR-14-05w.pdf](http://www.scottish.parliament.uk/S4_Welfare_Reform_Committee/Reports/wrR-14-05w.pdf)