Kendal Town Council

Town Hall, Highgate, Kendal LA9 4DD
www.kendaltowncouncil.gov.uk

4 November 2026

To Members of the Management Committee

Members representing committees may substitute Vice-Chairs if unable to attend. Please notify the Chair and the Town Clerk before the meeting. This agenda is copied to all Councillors for information.

Cllr G Archibald (Chair of Environment)	Cllr A Finch (Chair of Allotments)
Cllr A Blackman (Chair of Kendal in Bloom)	Cllr H Ladhams (Mayor)
Cllr S Coleman (Chair)	Cllr S Long (Rep on Kendal Futures)
Cllr J Dunlop (Vice-Chair)	Cllr D Rathbone (Chair of Planning)
Cllr L Edwards (Chair of Culture & Communities	Cllr C Russell (Chair of Audit)

You are summoned to a meeting of Kendal Town Council's Management Committee on **Monday, 9 November 2026, at 7pm**, in the Council Chamber at the Town Hall, Highgate, Kendal.

Yours faithfully

Chris Bagshaw
Town Clerk

AGENDA

Public Participation

Any member of the public who wishes to ask a question, make representations or present a deputation or petition at this meeting should give notice of their attention to do so by contacting the Town Clerk on 01539 885 430, office@kendaltowncouncil.gov.uk, prior to the commencement of the meeting. Information on how to make the application is available on the Council's Website - http://www.kendaltowncouncil.gov.uk/kendal-town-council/statutory-information/guidance-on-public-participation-at-kendal-town-council-meetings/. The public are not permitted to speak in other parts of the meeting unless allowed to do so by the chair.

1. Apologies

To receive and accept any apologies. If accepted, apologies will be considered to be for reasons approved by the Council under the terms of Local Government Act 1972, s85.

2. Declarations of Interest

To receive declarations by members and/or co-optees of interests in respect of items on this agenda.

3. Exclusion of Press and Public (Public Bodies Admission to Meetings Act 1960)

To consider whether there are any agenda items during consideration of which the press and public should be excluded.

4. Minutes of the Last Meeting (pages 4-8)

To receive the minutes of the meeting of the Management Committee held on 14 September 2026 and to authorise the Chairman to sign them as a correct record.

5. Minute Action Sheet (pages 9-10)

To consider a report on actions taken by officers on resolutions or recommendations made at previous meetings.

6. Council Activity Report (pages 11-51)

To consider the progress made across the various actions the Council is involved in and make any necessary decisions.

7. Budget 2026–2027 (pages 52-66)

To review the expenditure against budget in the current year.

8. Budget 2027–2028 (pages 67-69)

a) To consider the proposed budget for the upcoming year.

b) To appoint members to the Budget Working Group for the current year.

Background

The Budget Working Group reviews the budget proposals from the Council's Committees and ensures that the Management Committee's meeting in January is able to consider a viable whole-council budget. The Working Group includes the Clerk, the Finance Officer, and at least three members (Cllrs Archibald, Russell and Ladhams were appointed last year).

9. Community Infrastructure Levy (CIL) (pages 70-80)

To receive a report on the current levels of CIL funding and the Council's expenditure to date.

10. Kendal Futures

To receive a verbal briefing from Cllr S Long on the progress of work being carried out by Kendal Futures.

A separate report on this matter may be circulated to members of the Committee.

11. Newsletter and Publicity

To consider which items will be included in a press release and items for the next edition of the Council's Newsletter.

PART TWO

It is likely that the following items will be considered following a resolution to exclude the press and the public, due to the content being of a confidential nature, disclosure of which would be prejudicial to the public interest, or another special reason stated in the resolution. Issues which are raised by verbal update will not require the Council to decide to do anything other than to timetable an issue for a future agenda, or to assist the Clerk on decisions or actions which are delegated to the Proper Officer.

12. Forward Planning and Town Vitality Issues

To consider any issues of Forward Planning and Town Vitality which may require further resource or agreement.

13. Property and Office Accommodation

To receive a brief update from the Clerk on Office Accommodation and other property matters. This may include necessary actions which will require further details prior to any budgetary decision being taken.

A separate report on this matter may be circulated to members of the Committee.

14. Employment and Staffing Matters

To receive a verbal report from the Chair of Staffing Sub-Committee or the Clerk on any other staffing matters requiring the Committee's consideration and guidance.

A separate report on this matter may be circulated to members of the Committee.

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Minutes of a meeting of the Management Committee held on Monday, 14 September 2026, at 7pm, in the Council Chamber at the Town Hall, Highgate, Kendal.

Cllr G Archibald (Chair of Environment)	Present	Cllr A Finch (Chair of Allotments)	Absent
Cllr A Blackman (Chair of Kendal in Bloom)	Apologies	Cllr H Ladhams (Mayor)	Present
Cllr S Coleman (Chair)	Present	Cllr S Long (Rep on Kendal Futures)	Present
Cllr J Dunlop (Vice-Chair)	Present	Cllr D Rathbone (Chair of Planning)	Apologies
Cllr L Edwards (Chair of Culture & Communities)	Present	Cllr C Russell (Chair of Audit)	Present

In attendance: Chris Bagshaw (Town Clerk), Ben Unsworth (Temporary Democratic Services Assistant); Cllr T Martland (Vice-chair of Planning)

M12/2026 Apologies

Resolved: To receive and accept apologies for absence from Cllrs Blackman and Rathbone, and then to allow Cllr Martland to deputise for Cllr Rathbone in his absence.

M13/2026 Declarations of Interest

There were no further declarations of interest.

M14/2026 Exclusion of Press and Public (Public Bodies Admission to Meetings Act 1960)

Resolved: Prior to consideration, to vote to exclude the Press and the Public for consideration of Agenda Items Nos. 8 (Kendal Futures), 10 (Forward Planning and Vitality Issues), 11 (Property and Office Accommodation), and 12 (Employment and Staffing Matters) because of the confidential nature of the business being considered.

M15/2026 Minutes of the Last Meeting

Resolved: To receive the minutes of the previous meeting of the Management Committee held on 6 July and to authorise the Chairman to sign them as a true record.

M16/2026 Minute Action Sheet

The Town Clerk reported on actions taken by officers on resolutions or recommendations made at previous meetings, including advising over the minute action plan process. There was a request for them to email the Town Clerk with the consolidated issues list. Items commented upon or queried included:

Ref. 103 Property and Office Accommodation

The majority of discussion over this was deferred until **PART TWO**, however the potential increased usage of County Hall car park, in light of W&FC staffing decisions, was noted.

Ref. 127 In conjunction with Item 97

The Committee decided, after querying the process of removing items from the minute action sheet, that this could be concluded for the moment.

Ref. 131 Website

Outside bodies will be an upcoming focus of KTC, but it was commented that in the interim the new Democratic Services Assistant is able to assist with several website duties.

Ref. 139 Newsletter and Publicity

Discussion of this was deferred until **M20/2026**.

Resolved: To note the officers' actions and then to progress the items where stipulated.

M17/2026 Council Activity Report

The Committee considered a report on progress made across the various actions. Attention was drawn to:

1a, Development of Green Spaces

Discussion of Sandy Meadows was deferred until **PART TWO**.

1b, KTC Estate

The Committee were informed that the Estates and Grounds Officer had now started work and was already greatly beneficial, one major suggestion being that rather than investigating the vehicles mentioned in past meetings KTC should instead look at different sorts of all-terrain vehicles. It was accepted that this rethink may cause some delays.

1c, River Kent

The Committee were reminded that a Himalayan Balsam group are keen to approach Councillors with an update/talk; they decided to make this an agenda item for the Environment Committee and then circulate to Full Council afterwards.

1d, Litter Initiatives

The Town Clerk reported that there were ongoing deliberations over waste management, encouraging Councillors to add items for discussion. The Committee were made aware of Simon Raven's volunteer group, and it was suggested that collaboration with them could be beneficial.

1e, Citizen's Jury

The Town Clerk reported that he would circulate the 'Fresk' date soon to staff, but members too as some spaces remain. It was explained that this is an activity-based exercise focused on awareness and productivity, then reiterated that this formed part of KTC staff training anyway.

Comments from Councillors included questions over progress with developing a climate strategy, outcomes from the talk with Hannah Girvan on 9 September at 5.30pm, and how nature projects have been absorbed into those focused on climate change. The Town Clerk reassured Councillors of how staff training incorporates climate change awareness and strategies, and that the Council Plan will be re-assessed in 2027, with an eye on nuance and creating equal information streams. It was also affirmed by the Committee that W&FC involvement is integral in all these plans.

2a, Civic Planting / Kirkland in Bloom

The Committee noted updates on stewardship and the Heart of Kendal project, that planting was imminent, and reiterated that W&FC involvement must be vastly strengthened in order to keep the management and financial decisions of these schemes robust, feasible, and effective.

2a, Neighbourhood Planning

The Town Clerk reported that legislation over this has changed for the first time since 2012, meaning it is now a stronger material planning consideration in its own right. The Committee commented that, resultantly, Full Council should receive a briefing on this and that a timeframe should be established as soon as possible in order to make sure the format is clear. It was suggested that this could be advanced at the Planning Meeting on 21 September 2026.

2a, Street furniture / Heart of Kendal

The Committee discussed the principle of ownership of bus shelter estates and noted that a formal declaration to W&FC should be soon so that positive action is assured and robust infrastructure can be created. The slow progress of Heart of Kendal was then queried; as such, it was requested that KTC evince in them a sense of urgency, regarding their management of capacity issues and the maintenance of items such as posters, which town-wide are very outdated.

4b, Sports and Nature

It was noted that significant progress has been made regarding Park Run, that it will have an environmental benefit as Kendalians will not have to travel to Park Runs further afield, and that extra support from KTC will be necessary for it to become viable – however, this latter point was deemed unproblematic. The Town Clerk proceeded to inform the Committee that he intends to arrange a meeting between him and Countryside Access.

4d, Community Resilience

The Town Clerk informed the Committee of progress with the Resilience Week project, to be held between 17 to 24 October, including a range of low-key activities at Kendal locations, providing information to residents and creating awareness, as well as some social media activity. The Committee were assured that information will be cascaded down to them and that there will be an update to Culture and Communities on 21 September 2026.

5b, 20MPH

Officers for Highways are now doing surveys. It is hoped this can be delivered before Christmas 2026.

Council Audit and Administration

The Town Clerk was very happy to inform Councillors that they had had an extremely clean audit, with the sole comment being about how we present the reserves. The Finances and Admin Officer, Development and Delivery Manager Maternity Cover, and Projects Officer were praised for their work.

Resolved: To note the Council Activity Report and further the relevant actions.

M18/2026 Budget 2026/2027

The Committee raised concerns with the way some projected figures were presented; however, the Town Clerk assured Councillors that they were as thorough as they could be since they are only projected. He then explained that the new internal auditor is greatly improving budget maintenance and that forecasting is so far accurate.

Resolved: To note this and further the relevant actions.

M19/2026 Kendal Futures

See **PART TWO**.

M20/2026 Newsletter and Publicity

As per the deferred **Ref 139** in **M16/2026**, it was discussed that the ongoing priorities are projects of the Environment and Culture & Communities Committees, including the Bowling Fell project, with the next newsletter due for release in a fortnight.

Resolved: To note this and further the relevant actions.

PART TWO

Members voted to exclude the Press and Public for the following items of business due to the confidential nature of the discussion.

M19/2026 Kendal Futures

Cllr Long gave a verbal update on the activities of Kendal Futures, including their interactions with the Town Team and Highways. Regarding this, she then

expressed that knowing the timescales and creating designs which echo one another are their greatest priority. It was noted that KF will attend a meeting on 15 October 2026 in the hopes of gaining MP Tim Farron's support with their project. The Committee suggested raising some of the updates given in this update at the upcoming W&FC Cabinet Meeting as well.

Resolved: To note the report, fully support KF, and for them to keep this Committee fully abreast of future developments.

M21/2026 Forward Planning and Town Vitality Issues

The Town Clerk gave a verbal update on Town Vitality. Discussions focused on the multiplicity of channels available and the emerging plan of communications.

Resolved: To note and further the relevant actions.

M22/2026 Property and Office Accommodation

The Town Clerk gave a verbal report in light of meeting he'd had with members of W&FC. The main points discussed included: property management; a new FM; Town Hall bookings; and allocation of resources. The Committee agreed that they desire bigger picture items to be the Town Hall's current priority.

Resolved: *It was at this point that the Committee voted to suspend item 3X of the Standing Orders, and to allow a further half hour for the Committee to conclude its business.*

Councillors raised certain queries and wanted it emphasised that they consider the Town Hall to be the heart of the community heart.

Developments concerning the Mintsfeet nature area/Sandy Bottoms land were noted, with the Committee voicing their opinions and emphasising that they'd like to be part of public accessibility discussions with W&FC and other conversations with high-impact decisions.

Resolved: To note the verbal update and for certain Councillors and officers to contact W&FC.

M23/2026 Employment and Staffing Matters

The Town Clerk gave a short update on two new staff members: the Democratic Services Assistant and the Grounds and Estates Officer. He then updated the Committee on the status of a previous member of staff's retirement.

Resolved: To note the verbal update.

The meeting concluded at 9.23pm

Item No.5 - Management Committee - Minute Action Sheet - as at 30 June 2026

Ref. No.	Meeting Date	Minute No.	Title	Action (Resolution)	Officer Responsible	Deadline, if any	Date Actioned	Comments
107	27/05/2025	M7/2025	Budget 2025/26	To consider putting the Premises Alarms, Services and Maintenance Contract out to tender again.	CB		Aug-25	Costs being reviewed, as part of Fire and Risk management scheme
131	05/01/2026	M69/2025	Website	To add outside bodies to Councillor information on the website and to check all Councillor information remains accurate before publication.	NW	31-Mar-26		In progress - all councillors contacted regarding personal information. Outside bodies to be added in conjunction with website build.
135	02/03/2026	M83/2025	Neighbourhood Planning	To explore the possibility of an introduction to the local plan presentation for KT Councillors	CB			Plan presentation delivered by W&FC to all parishes
136	02/03/2026	M86/2025	Community Governance Review	To seek legal advice on the refusal by W&FC to incorporate the Beeches and Burton Road developments into Kendal CP.	CB		10-Mar-26	informal legal discussion suggests only routes open are political lobbying or judicial review.
138	02/03/2026	M90/2025	Presentations	Priority presentations sought from EA, Kendal Futures, Eddington and Kendal BID	NW/CB	14-Jul-26		invites sought
139	06/07/2026	M09/2026	Newsletter and Publicity	Paper being developed on resources/actions to improve KTC/BID/KF offer.	CB/JD			
140	06/07/2026	M06/2026	Cycleways and Footpaths	Supplying a copy of W&FC report on cycleways/footways to Committee so KTC can consider supplementary funding	CB	30-Sep-26	02-Nov-26	Followed up through Environment Committee.
141	06/07/2026	M07/2026	Projected Expenditure	Improving reports on projected expenditure	CB/SD/JD	30-Nov-26		Revised budget monitoring methodolgy being developed

Ref. No.	Meeting Date	Minute No.	Title	Action (Resolution)	Officer Responsible	Deadline, if any	Date Actioned	Comments
142	06/07/2026	M07/2026	Apportioning	Annual proportional reapportioning being done more often	CB/SD/JD	30-Nov-26		Revised methodolgy being developed

Item No.6

Kendal Town Council

Action Plan November 2026

The Council Plan agreed in the Summer of 2023 is set out below.

Priority	Plan
1. Climate Change and Biodiversity	a) Protect and improve green spaces, so they provide a natural home for wildlife, as well as being a wonderful place for people.
	b) Support awareness and actions that help us move toward zero carbon.
	c) Enhance our connections to the natural spaces and the river Kent.
	d) reduce pollution, encourage the reduction of waste and the means for better recycling.
	e) Work with partners to make all aspects of our lives more environmentally sustainable.
2. How Kendal Looks and Feels - the Public Realm	a) Ensure the most is made of Kendal's natural beauty, fantastic location, great architecture, rich heritage, civic pride and strong community.
	b) Collaborate with partners to increase the number of affordable and sustainable homes for local families, encouraging the highest standards.
	c) Maintain and improve our open green spaces and allotments.
	d) Drive for a high quality in the buildings and maintenance of the town centre and its public space.
3. A Thriving Town	a) Promote Kendal to visitors and new arrivals.
	b) Engage with partners to deliver the Vision for Kendal and the Town Centre Strategy.

	c) Champion Kendal as a market town, service hub, retail centre and tourist destination.
	d) Promote the town's industries, culture and heritage.
	e) Encourage and support local people in creating and delivering community festivals and events.
4. Supporting People and Community Wellbeing	a) Fight for the delivery of the local services people need,
	b) Collaborate with local communities, young people, local schools and colleges to provide services and opportunities for all young people.
	c) Support local community, voluntary, faith groups and businesses who together are addressing social issues and building our communities.
	d) work with local groups and community centres to address isolation, special needs and emergencies.
	e) encourage groups and institutions to come together, collaborate and develop efficient partnerships.
5. Getting Around	a) Improve footpaths and cycle ways.
	b) Lobby central government, and other partners to ensure the town has a better road system, that is maintained to the best standards, delivering better safety and shared use of our streets.
	c) Push for the improvement of bus and train services.
	d) Encourage active travel to access local services.
6. General	All plans and priorities will rely on engaging communities and encouraging participation. Our town's success is dependent on all of us working together. In all we do as Kendal Town Council, we will work to encourage the involvement of local people in local

	projects, to improve neighbourhoods, in the development of our communities and the coming together of our town for the benefit of all.

Action Plan

The Council existing action plan is laid out below, with reference to the areas of the Council Plan being addressed.

1. Climate Change and Biodiversity						
Plan	**Current Action**	**Aims and Actions**	**Committee**	**Partners**	**Timeframe/ comments**	**Status change since last meeting**
a) Protect and improve green spaces, so they provide a natural home for wildlife, as well as being a wonderful place for people	Development of Green Spaces	To be an active partner in the management and improvement of the town's green spaces. Improve Green Spaces for use and enjoyment.	Planning Allotments KiB Environment	W&FC/KCV/ Friends groups/residents groups/Natural Kendal/stakeholders	Ecological surveys for KTC owned land (Mintsfeet and Vicarage Drive) now completed. Results will be fed in to Environment Committee and have been shared with EA and Natural Kendal. Linked items: Kirkland in Bloom project, which is progressing into year 2. Previous commitments from W&FC to ensure 'Sandy Meadows' nature area remains accessible to the	Yes

					public have been withdrawn in the face of budgetary pressure. As a result the Town Council has been asked to step in to adopt the land. A report on this matter appears elsewhere in theis agenda.	
	Pollinator planting	To plant pollinators widely across Kendal, working with partners and the community.	KiB Environment	W&FC and their GM Contractor, Cumbria Wildlife Trust EA, KCV	Project for site enrichment of two pollinator sites completed with KTC CIL funding Horticultural support offering advice for ongoing management of pollinator areas, now enhanced by recruitment of horticulture lead in Estates role. Planting at Beezon Fields expected – partnership between KiB, EA and KCV may also require further interventions from KTC	Yes
b) Support awareness and actions that help us move toward zero carbon.	Inspiration Hub	Development of hub in town centre to meet issue of information being distributed to community	Environment	SLACC, Waste into Wellbeing, Eddington CIC and other stakeholders	The Eddington CIC unable to attend Full Council in December. Recent change of directors, relationship being maintained with SLACC and WIW for time-being. Presentation from WIW to Full Council completed in February – with expectation of future funding requests to follow.	No

	Zero Carbon Kendal Website	Developing public initiative for Zero Carbon Kendal	Environment	CAFS etc	Current project to be consolidated in website review, with existing standalone website wound down. Discussing with the Eddington as part of wider Climate actions. Notice on website to be given in Q3 2026.	No
	Carbon Zero Statement	Carbon Zero Kendal by 2030	Environment		Statement made in 2019. Ambitions and practicality to be reviewed as part of Citizen's Jury next steps and Climate project for 2026.	No
	KTC Estate	Review the KTC estate and operations	Management		A range of vehicle solutions are being reviewed by the Estates team to improve carbon footprint and operational efficiency. Current electric vehicle options included hybrid model, but also Keicar light industrial vehicle which is more attuned to estate needs.	Yes
c) Enhance our connections to the natural spaces and the river Kent.	River Kent	To improve the River Kent as a clean, accessible river.	Environment	CRKC/EA/W&FC/SCRT	CRKC Group funded, but ongoing support needed. Himalayan Balsalm group presenting to council over winter about their work Town Council land management proposals could lead to KTC managing the whole corridor from Shap Road to Beezon Fields, which would allow a consistent approach	Yes

					to management for a long stretch of river.	
	Flood Relief Scheme	Working group under Planning Committee.	Planning Management Environment	EA/W&FC	Ongoing work with W&FC and EA to ensure FRS delivers acceptable outcomes. Working Group has now seen upstream storage plans, which the EA believe to be deliverable. This is a crucial part of ensuring the Kendal scheme achieves maximum benefit. Aynam Road glass wall project now under way, funded by KTC	Yes
	River Corridor	See priority 5				
	Dev of green spaces	See priority 1				
d) Reduce pollution, encourage the reduction of waste and	Dark Skies	To darken the skies of Kendal to support biodiversity and Nature recovery	Environment	FOLD/W&FC/ Kendal BID	A new lighting policy has been developed in partnership with W&FC, who have agreed to adopt all existing lights. Paperwork for legal transfer received from W&FC.	Yes

the means for better recycling.					Heron Hill lighting project, which includes dark skies principles, has been installed this autumn. Delivered: - Town-wide audit - Heritage lantern head replacement project x 5 lights - Heron Hill lighting - Transfer of assets to W&FC.	
	Litter Initiative	To reduce waste and litter within the town and educate of the impact	Environment	W&FC	Litter initiatives to be explored, including resuming litter picks, though this is subject to staff time being available. Officer meeting with new head of Environment at W&FC resulted in improved yard cleaning.	Yes
	River Kent	See 1c				
e) Work with partners to make all aspects of our lives more	Citizen's Jury	To deliver a citizen's jury to help actions on climate change in Kendal	Environment	W&FC / The Eddington CIC/ SLACC / Futureproof Cumbria	Citizen's Jury delivered in 2020/ 2021 and produced list of recommendations. Citizen's Jury mailing list is maintained and currently has 380 subscribers. Communications are sent quarterly or as and when updates available.	No

environmentally sustainable.		To establish next steps for climate action in Kendal	Environment Management		Climate project – being scoped by officers to progress in 2026 following budget approval. To cover progress to date and develop a climate strategy for KTC based on the foundation provided by the Citizen's Jury. Climate 'Frisk' session organised for staff and members.	No
	Flood Relief Scheme	See priority 4				
	LCWIP	See 1b				
	Eddington Hub	See 1b				

2. How Kendal Looks and Feels - The Public Realm						
Plan	**Current Action**	**Aims and Actions**	**Committee**	**Partners**	**Timeframe/ comments**	**Status change since last meeting**
a)	Civic Planting	Civic planting to be delivered throughout the	Kendal In Bloom (KiB)	W&FC GM contractor, W&FC, KCV,	Horticultural consultant has provided recommendations for	Yes

Ensure the most is made of Kendal's natural beauty, fantastic location, great architecture, rich heritage, civic pride and strong community.		town centre in summer and winter, to bring floral colour to the town. Develop a Civic Planting Strategy to ensure that the planting is best fit for the environment and climate conscious.		various local groups	summer planting 2026, now implemented. Strategy for long term planting ongoing – updates to be provided to KiB. Expected to see some changes from winter planting 2026. New horticultural experience brought into estates team with appointment of new member of staff following limited restructure. Succession planning for street trees being considered through Town Team process, though budget considerations require bringing to the fore if the Town Council is to play an active role in their ongoing management. To date there has been little formal discussion on this matter with W&FC	
	Kirkland in Bloom	2025 will focus on the improvement to the southern gateway to the	KiB	W&FC, Volunteer network, Lakeland arts	Kirkland in Bloom project progressing. Year one delivered and year two scoped and presented to committee.	No

		town centre, with sustainable planting as one of the key outcomes			Spare plants used at several locations, but plans for wider use still seeking suitable Highways compliant project. Local Brownies have now also been able to adopt two areas of planting	
	Christmas lighting	Vibrant and up to date Christmas lights display for the Town Centre	Culture & Communities	Kendal BID, business owners, suppliers.	A Lowther Street extension was rejected by W&FC on property management grounds. Further expansion for scheme in 2026 being researched, but this is on hold awaiting outcome of Heart of Kendal changes.	No
		Delivery of a Christmas Lights Switch on Event	Culture & Communities	Kendal BID, Visit Kendal, Kendal Farmers Market, W&FC	Christmas Switch-On Event dates for 2026 now established in partnership with markets and town centre businesses. There will be a parade as well as the Christmas markets and entertainment.	Yes
	Town Centre Development	Develop the yards in Kendal	Environment	W&FC, Kendal BID,	Yard 5 delivered. Budget for yard improvements and	No

				Kendal Futures	maintenance approved for 2026-2027. Project to be scoped, but this is currently taking extra time for resources at W&FC to be identified.	
	Planning	Planning Response matrix - Previous version revisited	Planning	W&FC	Changes to W&FC systems have meant that this whole process is now more time consuming than previously. Staffing challenges have also been problematic, however, this has now been addressed (in the short term at least) and it is hoped the task will be picked up this Autumn.	Yes
		Local Plan engagement - Ongoing, subject to Planning Authority timetable	Planning Environment	W&FC/Kendal Futures	New planning legislation, LGR and the new Government has caused delays. Planning Committee briefed by W&FC officers, and Committee is fully engaged with process of developing new Local Plan. Working group developing strategic spatial plan to inform position in anticipation of next round of consultation in 2027.	Yes

					A number of sites submitted in CfS2 for amenity green land and transport/travel interchange. Site visits have been held to view specific issues on liminal and strategic sites. Strategic issues have been highlighted but there is a high state of flux created by changes in government and changes in Planning law.	
		Neighbourhood Planning - Scoping delivery of Neighbourhood planning to meet CIL and Local Plan needs	Planning All	W&FC/Kendal Futures	There was Budget allocation for development in 2025, however the issue was considered less important with the onset of the new Local Plan. Recent (August 2026) changes to the National Planning Policy Framework lead the Planning Committee to reconsider this position, however the NPPF also undermines some of the value of NP by reducing its time value.	Yes

	Street furniture	Council-owned assets repaired and improved. Elsewhere, subject to ongoing relationships with owning authorities	Environment/ KiB/ Allotments	W&FC, Kendal Futures, Kendal BID	Asset management system updated. See council administration section for further detail. Full review of benches completed in January 2026. Maintenance and repairs schedule established including urgent works. Bus shelter project progressing through the Environment Committee, with replacement shelter at Castle Green Lane, new roof at Castle Road, and extensive repairs at Blackhall Road, Burneside Road and Rydal Road. Initiative begun to improve all remaining bus stops where possible and where there is demand. New assets procured: - 2 x bins - 4 x benches	Yes

					- 1 x notice board Subject of deteriorating infrastructure being explored by the Environment Committee. Increasing requests for KTC to improve/ repair infrastructure and assets owned by others. Principal of KTC ownership/management of all bus shelters in town being explored but this is not as straightforward as it might have seemed, due to some 'zombie' ownerships, and changes to the way that buses are funded in the county.	
	Support capital projects and aspirations	Heart of Kendal	Management	W&FC, Kendal Futures, Kendal BID, Kendal College	Heart of Kendal project being delivered by Westmorland and Furness Council. This is progressing slowly in separate project parts with the Indoor Market proceeding to Design and Build, whilst the Outdoor Market is still being designed. A new operating model is being selected which	No

					may combine the operation of both. The active travel element is being handled by the active travel team on a separate project line along with LCWIP initiatives. Kendal College are benefitting from their element of the funding and have begun transforming parts of the Westmorland Shopping Centre. It is still not clear how this element will link to the others.	
		Vision and plans for street scene improvements in Kendal	Environment, Management, Culture & Communities KiB	W&FC, BID, Futures	Birdcage and Finkle Street public realm designs included in design brief for WSP as they develop Market Place/Kent Street. Kendal Futures Spatial Planning exercise resulted in opportunity housing sites report, which is attracting interest from investors. Shop front design guide commissioned by KF to assist Planning committees and shop	Yes

					developers to improve street scene. First steps made towards coordinating sustainable planting regimes in town centre through post-project revenue funding have been made with initial officer meeting.	

b) Collaborate with partners to increase the number of affordable and sustainable homes for local families, encouraging the highest standards	See 2 a – planning and capital projects					
c) Maintain and improve our open green	Allotment Development	To improve and expand the allotment provision in Kendal	Allotments	W&FC	Delivered improvement and expansion projects at Town View and Canal Head. Potential projects to create starter plots at Town View and	No

spaces and allotments.					plot development at Coley Barn.	
d) Drive for a high quality in the buildings and maintenance of the town centre and its public space.	Town Team & Town Vitality		Management	W&FC, Kendal Futures, Kendal BID	Town Team actions as stated above. Officer Town Vitality Group meeting regularly. Includes development of Kendal specific shop front guide and design code for Kendal. Cllr group now complementing officer group and working to integrate efforts, though this is not progressing as seamlessly as might be desired. The group has identified a range of partners across town and is collating their aspirations for the vitality of the town.	No
	Planning	See 2a – local plan engagement and neighbourhood planning				

3. A Thriving Town						
Plan	**Current Action**	**Aims and Actions**	**Committee**	**Partners**	**Timeframe/ comments**	**Status change since last meeting**
a) Promote Kendal to visitors and new arrivals.	Visit Kendal	Visit Kendal website and socials to promote the Town	Culture & Communities	Visit Kendal, Kendal Futures, Kendal BID, W&FC	Website, social media and leaflets being delivered annually. Leaflet designs updated for 2026 and now in distribution. 2025 – 2026 additional BID investment into Visit Kendal.	No

					BID now integrated into management process for Visit Kendal which is beginning to generate ideas.	
	Signage	Improve signage to make it easier for residents and visitors to navigate around town.	Environment	W&FC/Kendal BID/KF Lakes Line Rail User Group Avanti	Live projects: - Explore Kendal signage now being installed - Explore Kendal – Oxenholme - Oxenholme station Community noticeboard project to be scoped and brought to Environment Committee.	Yes
b) Engage with partners to deliver the Vision for	Kendal Futures/Natural Kendal	Council supports the Vision and is a partner to Kendal Futures	Management Planning Environment	Kendal Futures/W&FC/Natural Kendal	KF have developed a potential spatial strategy for town centre housing, which knits into KTC	Yes

Kendal and the Town Centre Strategy.					work on wider spatial planning issues. Natural Kendal have developed MOSPLAN project to assist in identifying areas where space for nature can be safeguarded.	
	See priority 2 – Heart of Kendal					
c) Champion Kendal as a market town, service hub, retail centre and tourist destination.	See priority 2 and 3 (A&D)					
d) Promote the town's industries, culture and heritage.	Heritage Collection	To promote Kendal and KTC's Heritage collection.	Mayoralty & Heritage	Kendal Museum/W&FC/AR Cumbria and others	M&H working group inc W&FC reviewing the collection and curation of the Mayor's Parlour. Delivery of Civic Events continues, with 450 specific events delivered.	Yes

					Careful liaison with W&FC and Kendal College over future of Kendal Museum is being carried out, with W&FC commissioning Tullock Associates to develop options for both Museum Collection and Cumbria Archive Service presence in town, which has been lost following the closure of County Hall. Probable report to Council as sole trustee of the building in late 2026. Heritage Partnership developing initiatives such as Heritage Open	

					Week, which is being led by KTC.	
	Walking Trail	To develop a walking trail or exhibition showcasing the heritage of Kendal	M&H	Lancaster University, Unity Festival, Anti-Racism Cumbria	A self-guided walking trail exploring Kendal's connections to the international and transatlantic slave trade has been developed and is now at design and print stage.	No
	Working with Partners	Work with partners to promote the Town's industries, culture and heritage	M&H	Lakeland Arts, Civic Society, Kendal Museum, Kendal College, CWAAS, Lancaster University, W&FC, individuals, Stricklandgate House, Kendal Parish Church project (KCT1000)	Local Heritage Partnership - KTC support of Stricklandgate House's development project through 3-year funding agreement. Third meeting of Partnership in June 26 included W&FC report on future of Museum collection and archive.	Yes

					Partnership members active in talks with Quaker Meeting House to explore ways to maintain museum opening. Heritage Open Week was coordinated by KTC as focus for whole town activity.	
e) Encourage and support local people in creating and delivering community festivals and events.	Grants and Funding	Provide festival grants to support both start up and well-established events and festivals	Culture and Communities		Updates to festival grant application process being implemented from start of financial year. Applications and impact to be monitored.	No
	Festival engagement and participation	Kendal Town Council to participate in festivals and events	Culture & Communities Management		Potential for KTC to play a more active role in Town activities through presence at events and festivals, where appropriate i.e. Torchlight Festival,	No

					Nature Recovery Festival etc. Leading partner in Town of Culture Expression of interest, though this was ultimately unsuccessful.	

4. Supporting People and Community Wellbeing						
Plan	**Current Action**	**Aims and Actions**	**Committee**	**Partners**	**Timeframe/ comments**	**Status change since last meeting**
a) Fight for the delivery of the local services people need.	Community consultation and engagement				Further planning and resources required, especially in developing influence over service delivery by others eg bus services. Programme of community engagement through Resilience Officer is	Yes

					aimed at building up picture of Community strengths and areas of low participation.	
b) Collaborate with local communities, young people, local schools and colleges to provide services and opportunities for all young people.	Sports and Nature	Lobby for and participate in the creation of a sports and nature hub.	Culture & Communities, Environment	W&FC	Mintsfeet Sports and Nature Hub WAF internal working group established. Updates to be brought to Environment Committee meetings. Kendal Park Run initiative being supported with land acquisition and path maintenance.	Yes
c) Support local community, voluntary, faith groups and businesses who together are addressing social issues and building	Grants and Funding	Provide community grants and funding to support the delivery of services and address needs.	Culture & Communities	WIW, W&FC, Faith Groups	Updates to community grant application process being implemented from start of financial year. Applications and impact to be monitored. Faith Covenant being discussed by Culture and Communities Committee.	No

our communities.						
d) work with local groups and community centres to address isolation, special needs and emergencies.	Flood	To ensure the Flood Relief Scheme is in keeping with the town's historic and natural environment whilst protecting as many communities as possible.	Environment Management Planning	W&FC/EA/others Flood relief scheme engaged with.	Flood relief working group continuing. KTC funding contributions to the flood wall. Planning issue at New Road resulted in unsuccessful challenge to EA designs, but this may lead to closer working over subsequent areas.	No
	Community Resilience	To connect and coordinate community resilience efforts	Management All Culture and Communities	W&FC, Kendal Community Resilience Group	Emergency Plan for Kendal published. Kendal Community Resilience Group meeting regularly. Storage unit at Canal Head allotment now being prepared. This has landowner consent and qualifies as a permitted development. Kendal signed up as participating town for the	Yes

					Making Cities Resilient 2030. Kendal Resilience Week a ntable success with good levels of engagement, take up by the press and volunteer recruitment. Further funding being applied for the support continued project.	
e) encourage groups and institutions to come together, collaborate and develop efficient partnerships.	See priorities 2, 3 and 4					

5. Getting Around						
Plan	**Current Action**	**Aims and Actions**	**Committee**	**Partners**	**Timeframe/ comments**	**Status change since last meeting**

a) Improve footpaths and cycle ways.	Footpath improvements	To improve the footpath network across Kendal to encourage active travel to school, work and the town centre.	Environment	W&FC	Work on Riverside paths continuing, being led by W&FC Countryside Access team. Stage one riverside path at Mintsfeet is complete. Stage two awaiting Network Rail permissions. Scroggs Wood to Wattsfield Stage one complete, with the issue of seasonal overgrowth being addressed by funding work with the Probation Service. Stage two awaiting EA consents. Vicarage Drive to Echo Barn Hill completed, with design tweaks implemented to deal with heavy rain.	Yes

					Regular meetings continuing between W&FC and KTC Councillors and Officers.	
		To improve the river corridor and create and route through the town.		W&FC, UU, Network Rail	Riverside North – funding secured by W&FC to proceed with improvement works on KTC land. Being progressed and updates provided through regular footpath meetings. Riverside South – resurfacing work with remaining UU funding completed.	No
		Kirkbarrow Connections - Connectivity of Kirkbarrow to schools, college and shops.		W&FC, South Lakes Housing	2 x paths delivered in 2025, 1 in 2026. Vicarage Drive to Echo Barn Hill (Adventure Footpath) completed (see comment above)	Yes

					Lobbying for wider Vicarage Park footpath improvements continues with W&FC, specifically through CIL funded drainage plans and parks and open spaces planning.	
	Footway lighting	Improvements to footway lighting to increase accessibility and safety of paths and encourage active travel.	Environment	W&FC, Friends of the Lake District	Heron Hill Lighting project completed. Project is using KTC CIL.	Yes
	Active Kendal	To promote an active and healthy town.	Environment Culture & Communities	W&FC/various groups	Pump tack installation is now being managed by Westmorland and Furness Council parks team with CIL funding. New Kendal Park Run at Mintsfeet being supported,	Yes

					with permissions and limited financial contribution from W&FC. KTC proposing to operate as principal funder and landowner.	
	LCWIP engagement	'Partner' to LCWIP as a means to improve active travel in Kendal	Environment	W&FC	Miller Bridge to Nether Bridge active travel corridor progressing as part of Heart of Kendal project. Public consultation conducted in November 2025.	No
b) Lobby central government, and other partners to ensure the town has a better road system, that is maintained to the best standards,	20mph	To promote the adoption of a 20mph speed limit throughout Kendal	Environment	W&FC	20 MPH scheme for Kendal now being implemented across town. KTC funding for SIDs to support scheme, subject to highways approval. Highways officers are now doing site visits to	Yes

delivering better safety and shared use of our streets.					establish viability of precise locations for SIDs. These will be subject to further consideration by members.	
	Better road system	Identifying actions and initiatives which will deliver traffic reductions in key areas of town	Planning Environment Management	W&FC/Kendal Futures/BID	Kendal Futures have worked up some ideas for consideration in their Better Streets, however there is much more work to be done on community input and delivery. Spatial Planning working group established to ensure Council is able to respond effectively to opportunities presented by changes to the Planning laws.	No

c) Push for the improvement of bus and train services.	Bus Provisions	To improve the experience for bus users in Kendal and promote active travel.	Environment	W&FC, Kendal Futures.	Bus Shelter project continuing –Castle Green Lane shelter replaced February 2026. Kendal Bus Station cleaned and new planting scheme for northbound side implemented. Working with W&FC to identify further work to complement longer term improvements of site.	No
d) Encourage active travel to access local services.	Bike parking	To improve safe and secure bike parking in the town centre	Environment	W&FC	Bike parking feasibility study being considered by Environment Committee. Proposed site planning now shared with members for comment and approval of funding.	Yes

6. General						
Plan	**Current Action**	**Aims and Actions**	**Committee**	**Partners**	**Timeframe/ comments**	**Status change since last meeting**
All plans and priorities will rely on engaging communities and encouraging participation. Our town's success is dependent on all of us working together. In all we do as Kendal Town Council, we will work to encourage the involvement of local people in local projects, to improve neighbourhoods, in the development of our communities and the coming together of our town for the benefit of all.	Communications.	To ensure that the council delivers regular and professional communications and appropriate social media presence.	All		Press releases and social media updates scheduled, ongoing content calendar mapped. Press release uptake with the Westmorland Gazette particularly successful. Branding success of new newsletter, now being printed in third edition (autumn 26).	No
	Website	To maintain a modern and up to date website	All		Clean skin website launched March	No

		that meets standards.			2026. Very few issues reported.	

Council Audit and Administration

The following section of the Action Report appears to sit outwith the proposed Thematic headings.

Action	Aims and actions	Plan reference	Committee	Partner	Timeframe	Status change since last meeting
Accommodation	Office move has created split site issues		Management	W&FC	Consolidation of Council presence in TH and Hub being prepared. Awaiting outcome of landlord's review of occupancy. Proposals currently stalled by W&FC capacity challenges, including User Group meetings, which have also stalled. Additional capacity now taken on in Angel Yard	No

IT	Agile working platform developed. Telephony improved to remove dependence on W&FC		Management	ITEK/W&FC	IT policy adopted by Full Council in February. IT policy stipulates requirements for officers and Councillors for use personal email addresses to ensure adequate data security and protections.	No
HR systems	Contracts, appraisal process and staff handbook		Management/Staffing	Staff	Breathe HR system and connect team being used for employee management. Employee handbook updated in 2026. Health Assured wellbeing programme for staff and councillors.	No
Financial Regulations and procedures	Council to keep on top of latest developments in model regulations and guidance		Audit/ Management		Assertion 10 in AGAR 2026 addressed prior to submission. AGAR returned without issue from External Auditor.	Yes

					New risk assessment templates developed and being implemented by all staff. Review underway of all general activity risk assessments. Audit Committee reviewing way in which financial reporting is delivered to Council, with several examples being reviewed to ensure improved transparency. Policies and procedures register maintained, policies being regularly reviewed and updated as required.	
Asset management reviews	External and parlour/picture store assets being		M&H/Environment /Audit	W&FC	Now complete, with problem areas identified. Internal Auditor has identified	Yes

	reconciled and reviewed.				some areas of risk. M&H Committee considering how historic collection is better managed. Moved asset list onto Rialtas system, to achieve proper and lasting integration with H&S policies and risk management as well as value tracking. Liaison with W&FC property managers to ensure Town Hall Collection is safeguarded through changes in W&FC sites has resulted in some changes to TH redevelopment planning. This process is ongoing. Limited scope liaison meeting with W&F facilities have stalled	

					again, and have not been reinstated. Internal and external communications is a serious concern with many user groups reporting problems. These have been escalated to the highest level at W&FC, but as yet no resolution has been seen. Issues such as the Town Council's User Rights in the building and the security of the Town Hall Collection have also not been addressed by W&FC.	
Budget process	Ensure all councillors and staff are aware of process and timeframe		All		Budget process for 2027 – 2028 requires confirmation at this meeting.	Yes
Committee structure	Ensure all committees are serving council plan.		All		Plan adopted 2023. Committees still working through roles	No

					to ensure they match. Light touch review by Council May 2024 resulted in tweaking of membership numbers.	
Community Governance Review	To ensure that Kendal Town Council's electoral arrangements, including the timing of the four-election cycle and the extent of the Civil Parish's boundaries are fit for purpose.		All	W&FC	First phase Community Governance Review completed by W&FC and election dates for 2026 altered to 2027. Second phase review submission only very partially accepted by W&FC. There is still uncertainty on how changes are implemented and whether they can be reviewed in the short and medium term to address issues of representation and identity.	No
Council Plan	To develop and implement a Council Plan and to ensure it is embedded in public engagement		All		Plan adopted 2023. Review of plan conducted in October 2025, including	

					delivery and areas for development. Existing priority areas 2 and 3 opportunity for further development.	

Kendal Town Council

Agenda Report

Committee: Management	Meeting Date: 9 November 2026
From: Town Clerk	Agenda No: 7
Description: Budget Monitoring Report 2026-27	

Background

Under the Rialtas finance system, each committee is given a copy of their 'Budget Monitor' report, which gives the exact tallies of their expenditure against the values the Council set at the budget. It has been noted that these reports contain several areas of information which can be misleading to the casual reader if not presented in context.

Officers are reviewing how the Rialtas system could be used to present reports in a different format, following some queries from the Audit Committee, but in the meantime, the existing reports are presented to this committee for information.

The Budget currently shows that the Council is on track to meet its revenue-based expenditure in the current financial year, and is making inroads into delivering projects from the Projects EMR.

Decision Required

The Committee is asked to note the reports.

Reports

The reports are presented in three sections.

Budget Monitor

The first is a traditional Budget Monitor, which shows the previous year's budget, the current year's budget and has space for the coming year, when this is agreed. On the current year it includes a column for Actual (where money has been paid against a specific accounting code); Committed (where money has been allocated by Purchase Order against a specific accounting code); and Projected (where money is expected to be paid from a specific accounting code). Of these, the Council's Audit Committee has been reviewing the way in which the 'Projected' figures are presented, as these require inputting by officers outwith the process of recording transactions.

The third set of figures is usually left blank until the Council's budget has been agreed.

Earmarked Reserves (EMR)

The second report shows where the Council has earmarked money that it holds in the bank for certain or specific purposes. Some of these reserves of legacies from previous activities.

The Allotments Reserve is the result of a capital sale by SLDC before the Council assumed the role of Allotments Authority in Kendal. Convention requires such a capital receipt to be

only available for subsequent capital expenditure (ie it can't be spent on day to day maintenance).

The Arts and Heritage Reserve has a similar restriction, being the product of the sale of various items in the Council's collection.

The Election Reserve is the money the Council puts aside to fund the four-yearly elections and any by-elections or parish polls for which it must assume liability. It is common to run this in two parts – one for four-year costs, and a second portion for occasional mid-term costs. This EMR is created by revenue funding (ie an annual budget contribution from the Precept).

The Wainwright EMR originates from a £10,000 gift from Alfred Wainwright to find the Council's annual Wainwright award. The award should be paid from the interest on the original sum.

Environment and Projects EMR represents the money the Council has allocated but not yet spent on its various projects and programmes. Originally this was funded by the product of Budget surpluses and known as the 'Development Fund', but for the last few years, as the money has all been earmarked for specific long-term projects (eg 20mph, or the Pump Track), it must now be replenished either through specific revenue budgets (ie form the Precept), or from other sources of income such as the Community Infrastructure Levy (CIL). Where CIL has been allocated to a specific project it moves from the CIL EMR to the Projects EMR.

The CIL EMR is the holding area for levies paid to the Council by the Planning Authority (now W&FC).

Other earmarked reserves are the product of one-off income sources (such as the Resilience funding, or a councillor's contribution to a specific project) or are allocations from elsewhere that require out-of-budget funding, such as that paid to Stricklandgate House from the CIL.

Balance Sheet

The Balance Sheet is a conventional statement of existing assets at a specific moment, so it includes cash levels in the bank and EMRs.

Kendal Town Council

Annual Budget - By Centre (Actual YTD Month 7)

Note: Full Budget Statement

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
100	**Income**									
1076	Precept	712,496	712,496	785,488	785,488	785,488	0	0	0	0
1080	Bank Interest	15,000	28,182	20,000	2,623	20,000	0	0	0	0
1090	CIL Receipts	0	89,973	0	8,833	0	0	0	0	0
1100	Allotment Rent	25,000	27,363	25,250	21,016	25,250	0	0	0	0
1901	Cumbria CF	12,500	12,500	12,500	0	12,500	0	0	0	0
	Total Income	764,996	870,515	843,238	817,960	843,238	0	0	0	0
6001	less Transfer to EMR	0	93,144	0	8,833	0	0	0	0	0
	Movement to/(from) Gen Reserve	764,996	777,370	843,238	809,127	843,238		0		
200	**Staffing Costs**									
4000	Staff GP	365,000	360,870	402,843	185,463	402,843	0	0	0	0
4055	Travel	0	131	0	124	0	0	0	0	0
4065	Staff Expenses	0	164	0	0	0	0	0	0	0
4070	Staff Training	2,500	3,052	5,000	480	2,000	0	0	0	0
	Overhead Expenditure	367,500	364,216	407,843	186,067	404,843	0	0	0	0
6000	plus Transfer from EMR	0	-400	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(367,500)	(364,616)	(407,843)	(186,067)	(404,843)		0		
210	**Premises & Accommodation**									
4100	Premises - Service & Rent	15,300	13,639	15,300	10,844	15,600	5,320	0	0	0
4103	Premises - Angel Yard	0	0	8,500	8,971	8,971	0	0	0	0
4110	Premises Telephones	2,000	3,896	4,000	2,083	4,000	1,983	0	0	0

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Kendal Town Council

Annual Budget - By Centre (Actual YTD Month 7)

Note: Full Budget Statement

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
4115	Premises Garage Rent	2,600	2,739	3,000	2,600	2,600	0	0	0	0
4120	Premises Garage Electricity	400	333	400	166	350	166	0	0	0
4130	Premises Other & Gen Equip	3,700	2,669	5,450	500	3,000	911	0	0	0
4135	Premises Alarms - Serv & Maint	2,000	1,748	2,500	2,493	2,500	0	0	0	0
4140	Premises PPE	1,000	836	1,000	0	1,000	0	0	0	0
	Overhead Expenditure	27,000	25,860	40,150	27,657	38,021	8,381	0	0	0
6000	plus Transfer from EMR	0	120	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(27,000)	(25,740)	(40,150)	(27,657)	(38,021)		0		
220	**IT & Communications**									
4200	IT Rialtas Costs	3,500	4,352	4,500	3,920	4,500	0	0	0	0
4205	IT Domain/Web (Designworks)	1,000	920	0	230	230	0	0	0	0
4210	IT Support (ITEK/Sage)	5,000	4,944	5,500	2,460	6,000	3,329	0	0	0
4220	IT ITEK Other Costs	4,500	4,632	6,800	2,562	6,800	3,515	0	0	0
4225	New IT /Comp/Equip (Assets)	3,500	3,204	3,500	34	3,500	0	0	0	0
4230	IT Other Costs	2,500	2,684	3,500	1,367	3,500	672	0	0	0
4235	Newsletter	14,000	13,533	14,000	5,836	14,000	3,310	0	0	0
	Overhead Expenditure	34,000	34,268	37,800	16,409	38,530	10,826	0	0	0
	Movement to/(from) Gen Reserve	(34,000)	(34,268)	(37,800)	(16,409)	(38,530)		0		
225	**Website & Branding**									
4240	Website & Branding	7,827	7,827	5,000	355	5,000	0	0	0	0
	Overhead Expenditure	7,827	7,827	5,000	355	5,000	0	0	0	0
6000	plus Transfer from EMR	0	7,827	0	0	0	0	0	0	0

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		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
	Movement to/(from) Gen Reserve	(7,827)	0	(5,000)	(355)	(5,000)		0		
230	**Policies/Ins & Finance Costs**									
4300	Insurance Public Liability	5,600	6,533	9,000	6,784	9,000	0	0	0	0
4305	HR Costs	6,680	8,432	10,500	10,650	15,000	3,408	0	0	0
4306	H&S Costs	2,555	2,555	4,000	1,460	4,000	1,175	0	0	0
4310	Finance Costs (Audit Fees)	3,000	2,880	3,000	0	3,000	350	0	0	0
4315	Finance - BK & Voucher Fees	200	236	200	79	200	0	0	0	0
4320	Finance Payroll Costs	520	428	350	235	472	235	0	0	0
	Overhead Expenditure	18,555	21,063	27,050	19,208	31,672	5,168	0	0	0
6000	plus Transfer from EMR	0	2,555	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(18,555)	(18,509)	(27,050)	(19,208)	(31,672)		0		
240	**Stationery/Office General**									
1999	Other Income	0	0	0	15	0	0	0	0	0
	Total Income	0	0	0	15	0	0	0	0	0
4400	Admin Printing/Stationery/Post	2,000	2,243	2,080	819	2,080	0	0	0	0
4405	Admin Office Equip/Consumables	2,000	488	2,000	143	2,000	0	0	0	0
4420	Photocopier (Lease & Service)	1,200	1,420	1,800	1,150	2,400	1,095	0	0	0
4425	Admin General	0	124	0	144	0	0	0	0	0
4430	Admin Subscriptions	3,000	3,373	3,420	3,350	3,420	0	0	0	0
	Overhead Expenditure	8,200	7,647	9,300	5,607	9,900	1,095	0	0	0
	Movement to/(from) Gen Reserve	(8,200)	(7,647)	(9,300)	(5,592)	(9,900)		0		

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Kendal Town Council

Annual Budget - By Centre (Actual YTD Month 7)

Note: Full Budget Statement

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
250	**Vehicle Costs**									
4500	Vehicle Fuel	1,200	1,050	1,200	420	1,200	0	0	0	0
4505	Vehicle Tracking Fee	120	96	96	48	96	48	0	0	0
4510	Vehicle Repairs	3,180	1,390	6,000	90	4,000	0	0	0	0
4515	Vehicle Van INS/TAX/MOT	1,000	970	1,204	1,042	1,204	0	0	0	0
4520	Vehicle Other Costs	0	7	0	0	0	0	0	0	0
	Overhead Expenditure	5,500	3,512	8,500	1,600	6,500	48	0	0	0
	Movement to/(from) Gen Reserve	(5,500)	(3,512)	(8,500)	(1,600)	(6,500)		0		
260	**Elections**									
4590	Election Fund	15,000	0	0	0	0	0	0	0	0
	Overhead Expenditure	15,000	0	0	0	0	0	0	0	0
6000	plus Transfer from EMR	0	-15,000	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(15,000)	(15,000)	0	0	0		0		
270	**Mayoralty & Heritage**									
4700	Mayoral Allowance	3,500	3,500	3,850	3,850	3,850	0	0	0	0
4701	Deputy Mayoral Allowance	1,500	1,500	1,650	1,650	1,650	0	0	0	0
4705	Mayoral Travel	800	815	1,000	69	1,000	0	0	0	0
4720	Mayor Making	2,100	1,515	2,100	1,779	1,800	0	0	0	0
4725	Torchlight Reception	2,000	881	1,900	133	1,200	1,035	0	0	0
4730	Remembrance Sunday	1,600	782	1,600	265	1,600	390	0	0	0
4735	Pictures & Others	1,759	1,509	250	0	250	0	0	0	0

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Kendal Town Council

Annual Budget - By Centre (Actual YTD Month 7)

Note: Full Budget Statement

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
4745	Misc. Mayoral Functions & Exp	4,000	2,929	3,800	1,600	5,000	0	0	0	0
4746	Mayor's Charit Exp	0	1,495	0	0	0	0	0	0	0
4750	Twinning	1,500	2,781	4,000	490	4,000	0	0	0	0
4755	Exhibitions	1,000	3,065	1,000	-949	1,000	157	0	0	0
4760	Museum	2,000	2,000	2,000	0	2,000	0	0	0	0
	Overhead Expenditure	21,759	22,774	23,150	8,887	23,350	1,582	0	0	0
6000	plus Transfer from EMR	0	1,509	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(21,759)	(21,265)	(23,150)	(8,887)	(23,350)		0		
300	**Kendal Vision & Futures**									
4601	Kendal Futures Manager Contrib	10,000	11,500	0	0	0	0	0	0	0
4605	Kendal Vision Contribution	35,800	35,000	6,000	0	6,000	0	0	0	0
	Overhead Expenditure	45,800	46,500	6,000	0	6,000	0	0	0	0
6000	plus Transfer from EMR	0	30,000	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(45,800)	(16,500)	(6,000)	0	(6,000)		0		
310	**Promoting Kendal**									
1999	Other Income	0	10,000	0	0	0	0	0	0	0
	Total Income	0	10,000	0	0	0	0	0	0	0
4610	Kirkland Banners	1,500	1,500	0	0	0	0	0	0	0
4650	Visit Kendal Leaflets	9,000	8,782	0	0	0	0	0	0	0
4655	Visit Kendal Website Cont.	5,000	2,500	0	0	0	0	0	0	0
4660	Visit Kendal Content Co-ord.	5,500	9,473	10,000	2,040	10,000	410	0	0	0

Continued on next page

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
	Overhead Expenditure	21,000	22,255	10,000	2,040	10,000	410	0	0	0
	Movement to/(from) Gen Reserve	(21,000)	(12,255)	(10,000)	(2,040)	(10,000)		0		
320	**Wainwright Fund**									
9900	Wainwright Fund Exp	250	250	0	250	0	0	0	0	0
	Overhead Expenditure	250	250	0	250	0	0	0	0	0
6000	plus Transfer from EMR	0	250	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(250)	0	0	(250)	0		0		
400	**Audit, Grants & Charities**									
4690	AG&C Community Grants	30,000	30,000	49,667	43,382	33,000	2,000	0	0	0
4691	Torchlight/Brew/CA Grants	25,500	25,000	25,500	10,000	25,500	0	0	0	0
4693	Community Resilience	0	345	5,500	220	5,500	137	0	0	0
	Overhead Expenditure	55,500	55,345	80,667	53,602	64,000	2,137	0	0	0
6000	plus Transfer from EMR	0	345	0	16,667	0	0	0	0	0
	Movement to/(from) Gen Reserve	(55,500)	(55,000)	(80,667)	(36,935)	(64,000)		0		
430	**Christmas Lights & Festivals**									
4800	Christmas Lights Exp	31,000	28,865	31,000	16,350	31,000	2,738	0	0	0
4805	Christmas Lights Infra	2,235	2,235	2,765	0	0	0	0	0	0
4810	Christmas Electricity	1,750	2,787	2,000	0	2,000	0	0	0	0
4815	Christmas Switch On	11,000	9,323	11,000	90	11,000	101	0	0	0
4820	CL&F Bunting	1,500	1,356	2,500	0	2,500	0	0	0	0
4825	Anniversary Events	7,252	4,439	5,000	4,281	5,000	158	0	0	0

Continued on next page

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
4826	Cultural Iniatives	2,748	2,409	0	361	0	0	0	0	0
4827	Additional Projects	0	0	7,000	2,500	7,000	0	0	0	0
4828	Promoting Kendal	0	0	22,500	0	22,500	0	0	0	0
4830	Festival Grants	25,000	25,000	30,000	20,325	30,000	0	0	0	0
	Overhead Expenditure	82,485	76,414	113,765	43,907	111,000	2,997	0	0	0
6000	plus Transfer from EMR	0	2,235	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(82,485)	(74,179)	(113,765)	(43,907)	(111,000)		0		
440	**Kendal In Bloom**									
1999	Other Income	0	500	0	0	0	0	0	0	0
	Total Income	0	500	0	0	0	0	0	0	0
4900	KIB Floral Displays	30,600	30,004	32,000	15,577	32,000	3,071	0	0	0
4905	KIB Projects & Grants	6,000	6,404	2,000	643	8,000	488	0	0	0
4906	KIB Kirkland Project	0	0	6,000	0	0	0	0	0	0
	Overhead Expenditure	36,600	36,408	40,000	16,220	40,000	3,559	0	0	0
	Movement to/(from) Gen Reserve	(36,600)	(35,908)	(40,000)	(16,220)	(40,000)		0		
500	**Allotments**									
5005	Allotments Gen Exp	9,200	8,855	9,500	5,407	9,500	105	0	0	0
5015	Allotment Water	2,100	1,202	2,500	517	2,500	0	0	0	0
5020	Allotment Rent	1,050	840	1,050	840	840	0	0	0	0
5025	Allotment Pest Control	3,300	2,846	3,300	1,826	3,300	0	0	0	0
	Overhead Expenditure	15,650	13,744	16,350	8,591	16,140	105	0	0	0

Continued on next page

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
	Movement to/(from) Gen Reserve	(15,650)	(13,744)	(16,350)	(8,591)	(16,140)		0		
600	**E - New Infrastructure/Improve**									
5104	E - Bio & Climate Grants	10,000	3,920	8,000	2,913	8,000	0	0	0	0
5105	E - Bus Shelter & Railings (H	0	0	12,000	0	0	0	0	0	0
5106	E - Oxenholme Signage Improvem	0	0	0	10	0	0	0	0	0
5107	E - New Infrastructure	1,625	1,625	2,875	4	0	750	0	0	0
5108	E - Infrastructure Maint	8,850	6,628	9,000	2,859	8,500	0	0	0	0
5112	KTC002 E - Explore Sign Projec	11,496	11,496	7,961	0	0	0	0	0	0
5113	KTC023 Oxenholme Explore Totem	4,195	4,195	6,805	0	0	0	0	0	0
	Overhead Expenditure	36,166	27,864	46,641	5,786	16,500	750	0	0	0
6000	plus Transfer from EMR	0	14,016	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(36,166)	(13,848)	(46,641)	(5,786)	(16,500)		0		
620	**E - Infrastructure Maintenance**									
5311	Green Infrastructure Main	2,350	2,350	6,000	3,435	6,000	0	0	0	0
	Overhead Expenditure	2,350	2,350	6,000	3,435	6,000	0	0	0	0
	Movement to/(from) Gen Reserve	(2,350)	(2,350)	(6,000)	(3,434)	(6,000)		0		
630	**E - W&F Charges**									
5310	E - W&F Charges-Bins	4,250	1,884	4,420	0	4,420	0	0	0	0
	Overhead Expenditure	4,250	1,884	4,420	0	4,420	0	0	0	0
	Movement to/(from) Gen Reserve	(4,250)	(1,884)	(4,420)	0	(4,420)		0		

Continued on next page

Kendal Town Council

Annual Budget - By Centre (Actual YTD Month 7)

Note: Full Budget Statement

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
900	**Projects - Climate Ch**									
9055	Climate Web Costs	615	615	0	0	0	0	0	0	0
	Overhead Expenditure	615	615	0	0	0	0	0	0	0
6000	plus Transfer from EMR	0	615	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(615)	0	0	0	0		0		
910	**Projects - Biodiversity**									
9120	DNU KTC007 Bio Dark Skies	2,735	2,735	665	0	0	0	0	0	0
	Overhead Expenditure	2,735	2,735	665	0	0	0	0	0	0
6000	plus Transfer from EMR	0	2,735	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(2,735)	0	(665)	0	0		0		
920	**Projects - 20MPH**									
9200	KTC018 - 20 MPH	882	882	30,718	0	0	0	0	0	0
	Overhead Expenditure	882	882	30,718	0	0	0	0	0	0
6000	plus Transfer from EMR	0	882	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(882)	0	(30,718)	0	0		0		
930	**Projects -Cycling & Walking**									
9305	KTC011 Kirkbarrow Connections	7,117	7,117	22,583	1,950	0	9,080	0	0	0
9307	KTC017 - Kendal Pump Track	0	0	34,180	0	0	34,000	0	0	0
9309	KTC011 - C&W Footpath Impr	1,950	1,950	18,050	0	0	0	0	0	0
	Overhead Expenditure	9,067	9,067	74,813	1,950	0	43,080	0	0	0

Continued on next page

Kendal Town Council

Annual Budget - By Centre (Actual YTD Month 7)

Note: Full Budget Statement

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
6000	plus Transfer from EMR	0	9,067	0	1,950	0	0	0	0	0
	Movement to/(from) Gen Reserve	(9,067)	0	(74,813)	0	0		0		
935	**River Corridor Connectivity**									
9600	River Corridor Connectivity	8,893	8,893	0	0	0	0	0	0	0
	Overhead Expenditure	8,893	8,893	0	0	0	0	0	0	0
6000	plus Transfer from EMR	0	8,893	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(8,893)	0	0	0	0		0		
940	**Projects - Green Spaces Impro**									
9400	KTC013 - Bowling Fell Project	205	205	9,795	480	8,682	2,500	0	0	0
9411	Mintsfeet Development	0	0	7,500	0	0	0	0	0	0
	Overhead Expenditure	205	205	17,295	480	8,682	2,500	0	0	0
6000	plus Transfer from EMR	0	205	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(205)	0	(17,295)	(480)	(8,682)		0		
950	**Projects -Public Realm Enhance**									
9502	KTC024 Pollintor Planting	0	0	11,500	11,500	0	0	0	0	0
9503	KTC016 Heron Hill Lighting	0	0	33,000	48	0	20,588	0	0	0
9506	PR Kendal Yards	20	20	4,980	0	1,493	0	0	0	0
9507	KT021 Oxenholme Station	0	0	6,514	400	0	3,718	0	0	0
9508	PR Aynam Road Fountain	0	0	5,000	5,000	0	0	0	0	0
9512	KTC019 PR Easy Travel	3,000	3,000	47,000	4,761	0	7,500	0	0	0
9513	KTC020 Bus Stop Improvements	15,280	15,280	4,720	370	0	8,800	0	0	0

Continued on next page

Kendal Town Council

Annual Budget - By Centre (Actual YTD Month 7)

Note: Full Budget Statement

		25/26		26/27				27/28		
		Budget	Actual	Total	Actual YTD	Projected	Committed	Agreed	EMR	Carried Forward
9514	Natural Kendal	10,000	10,000	0	0	0	0	0	0	0
9515	KTC004 Water Fountain Refill	0	0	5,000	0	0	0	0	0	0
	Overhead Expenditure	28,300	28,300	117,714	22,079	1,493	40,606	0	0	0
6000	plus Transfer from EMR	0	13,300	0	22,031	0	0	0	0	0
	Movement to/(from) Gen Reserve	(28,300)	(15,000)	(117,714)	(48)	(1,493)		0		
960	**Planning**									
9610	Planning FRSWG Scheme	150,000	150,000	0	0	0	0	0	0	0
9615	PlanningNeighbourhood Planning	1,500	0	0	0	0	0	0	0	0
9620	Planning Training	0	150	0	150	0	0	0	0	0
	Overhead Expenditure	151,500	150,150	0	150	0	0	0	0	0
6000	plus Transfer from EMR	0	146,500	0	0	0	0	0	0	0
	Movement to/(from) Gen Reserve	(151,500)	(3,650)	0	(150)	0		0		
	Total Budget Income	764,996	881,015	843,238	817,975	843,238	0	0	0	0
	Expenditure	1,007,589	971,028	1,123,841	424,280	842,051	123,244	0	0	0
	Net Income over Expenditure	-242,593	-90,013	-280,603	393,695	1,187	-123,244	0	0	0
	plus Transfer from EMR	0	225,653	0	40,648	0	0	0	0	0
	less Transfer to EMR	0	93,144	0	8,833	0	0	0	0	0
	Movement to/(from) Gen Reserve	(242,593)	42,496	(280,603)	425,510	1,187		0		

Kendal Town Council

Earmarked Reserves

Account		Opening Balance	Income	Expenditure	Closing Balance
320	EMR-Environment & Projects Res	**£378,204.01**	£0.00	£23,981.08	**£354,222.93**
321	EMR-Allotments Reserve	**£68,976.85**	£0.00	£0.00	**£68,976.85**
322	EMR-Arts & Heritage Reserve	**£13,032.63**	£0.00	£0.00	**£13,032.63**
324	EMR-Election Reserve	**£72,037.00**	£0.00	£0.00	**£72,037.00**
326	EMR-Wainwright Fund	**£11,406.76**	£0.00	£0.00	**£11,406.76**
327	EMR - Connectivity	**£2,708.00**	£0.00	£0.00	**£2,708.00**
328	EMR Cllr Contributions	**£4,500.00**	£0.00	£0.00	**£4,500.00**
329	EMR Visit Kendal	**£30,000.00**	£0.00	£0.00	**£30,000.00**
332	UU Contribution to Footpaths	**£16,107.09**	£0.00	£0.00	**£16,107.09**
334	EMR Stricklandgate House	**£16,667.00**	£0.00	£16,667.00	**£0.00**
353	EMR - Kendal Resilience	**£20,768.35**	£0.00	£0.00	**£20,768.35**
354	EMR - CIL	**-£7,103.58**	£8,833.31	£0.00	**£1,729.73**
TOTALS:		**£627,304.11**	**£125,502.31**	**£157,317.08**	**£595,489.34**

29/10/2026

10:11

Kendal Town Council

Balance Sheet as at 01/10/2026

31st March 2026				31st March 2027
		Current Assets		
8,732		Other Debtors	0	
2,427		Nat West Bk Debtor	2,427	
10,356		VAT Control A/c	7,072	
4,981		Prepayments	0	
279,981		Current and Reserve Bk A/cs	252,045	
599,975		Cumberland Building Society	1,000,000	
63		Petty Cash	48	
906,515				**1,261,591**
	906,515	**Total Assets**		**1,261,591**
		Current Liabilities		
8,183		Creditors	438	
31,268		Accruals	19,779	
19,385		Receipts in Advance	0	
58,836				**20,217**
	847,679	**Total Assets Less Current Liabilities**		**1,241,374**
		Represented By		
	220,375	General Reserves		645,884
	378,204	EMR-Environment & Projects Res		354,223
	68,977	EMR-Allotments Reserve		68,977
	13,033	EMR-Arts & Heritage Reserve		13,033
	72,037	EMR-Election Reserve		72,037
	11,407	EMR-Wainwright Fund		11,407
	2,708	EMR - Connectivity		2,708
	4,500	EMR Cllr Contributions		4,500
	30,000	EMR Visit Kendal		30,000
	16,107	UU Contribution to Footpaths		16,107
	16,667	EMR Stricklandgate House		0
	20,768	EMR - Kendal Resilience		20,768
	(7,104)	EMR - CIL		1,730
	847,679			**1,241,374**

Kendal Town Council

Agenda Report

Committee: Management	Meeting Date: 9 November 2026
From: Town Clerk	Agenda No: 8
Description: Budget 2027-28 and Medium Term Financial Plan	

Background

The Committee must consider its expenditure aims for the next financial year, and make its recommendations to the Council. Expenditure should be in keeping with the aims of the Council Plan. The Budget Working Group will review a consolidated budget (from all Committees) and report back to this Committee with its overall recommendation for consideration, prior to approval by the Full Council in February.

The table below shows a summary of the Committee's budget headings, and includes their anticipated and proposed growth over the next three years.

Summary Heading	Current year	Proposed	Projected	Projected	Notes
	2026-27	2027-28	2028-29	2029-30	
Premises	40,150	41,750	42,500	6	1
IT and telephony	42,800	44,500	46,250	47,640	2
Insurance and Finance	27,050	28,150	29,000	29,870	3
Office management	9,300	9,700	10,100	10,400	4
Vehicle	8,500	10,000	3,000	4,000	5
Elections	0	5,000	5,000	5,000	6
Staffing costs	407,843	425,000	437,750	450,885	7
Futures and Vision	16,000	20,000	20,000	20,000	9
Total	551,643	584,100	593,600	611,570	
Wainwright	250	250	250	250	10
Futures and Vision	30,000	*	*	*	11

1 This assumes the Council's office and garage rents will rise, and also includes the cost of alarms, fire extinguishers, electricity, staff PPE and meetings.

2 This was increased significantly last year to accommodate the increased costs of subscription-based software, particularly. This cost includes headroom to continue improvements to keep up to date with GDPR and transparency legislation, including the new Assertion 10 in the AGAR.

3 This includes the cost of insuring premises and additional costs passed on by W&FC for the garage on Dowkers Lane. Also included are the Health and Safety and Human Resources advisors, also based on a subscription model.

4 For historical reasons this includes subscriptions to NALC and SLCC, which have risen above inflation in recent years. Actual stationery costs have been brought down, though copier costs have continued to rise.

5 The Council set aside a sum in the current year to support a lease on a new vehicle. However, subsequent operational review has suggested that a smaller 4wd vehicle would be more suitable in the role. Costs for this are currently looking at below £20,000 for outright purchase. It is suggested that the remaining vehicle budget from this year is rolled into next year to support this.

6 The Council budgeted for the cost of in 2026. It is believed to have sufficient election cost reserves for 2027 combined elections, but must continue to contribute to funds against the cost of elections in 2031 and occasional by-elections.

7 This allocation costs in the employment of additional staff to meet the Council's service delivery aspirations. It includes training (£5,000) and travel and the impact of any changes to pensions and salary levels due to national agreements (estimated 3% increase).

8 Kendal Futures is reviewing its funding model for the coming year, as pressures from the principal authority increase. This is KTC's contribution to the management of the organisation, which it is proposed to increase to ensure sufficient head room for future planned project development, which would be the subject of separate funding proposals.

9 This is drawn from the Wainwright Fund, which is an earmarked and protected fund from which the prize may drawn down interest.

10 This allocation was drawn from CIL and has been spent. It is shown here to illustrate how the additional funding to Kendal Futures is time limited, and not drawn from the Revenue fund.

Decision Required

The Committee is asked to consider the recommendations contained in the report and recommend them to the Council and its Budget Working Group.

Kendal Town Council

Agenda Report

Committee: Management	Meeting Date: 9 November 2026
From: Town Clerk	Agenda No: 9
Description: CIL Allocations and Proposals	

Background

The Management Committee has the delegated responsibility to oversee the allocation of the Community Infrastructure Levy (CIL).

There are no current further proposals for CIL expenditure. This report gives an update on current receipts and the progress of previous allocations.

The Appendix shows the rules for CIL funding as decided by South Lakeland District Council. Westmorland and Furness Council adopted these rules at inception. Kendal Town Council's rules for allocation are also appended.

Kendal Town Council

CIL Receipts to date

	Year	period	Levy period start	Levy period end	Levy period total
	1	1	01/10/2015	31/03/2016	43.42
	2	2	01/04/2016	30/09/2016	602.77
	2	3	01/10/2016	31/03/2017	1,961.12
	3	4	01/04/2017	30/09/2017	1,350.73
	3	5	01/10/2017	31/03/2018	2,037.06
	4	6	01/04/2018	30/09/2018	6,171.79
	4	7	01/10/2018	31/03/2019	1,187.60
	5	8	01/04/2019	30/09/2019	1,249.49
	5	9	01/10/2019	31/03/2020	3,943.12
	6	10	01/04/2020	30/09/2020	5,081.74
	6	11	01/10/2020	31/03/2021	6,955.24
	7	12	01/04/2021	30/09/2021	7,369.73
	7	13	01/10/2021	31/03/2022	48,305.25
	8	14	01/04/2022	30/09/2022	19,870.97
	8	15	01/10/2022	31/03/2023	84,137.86
	9	16	01/04/2023	30/09/2023	56,681.02
	9	17	01/10/2023	31/03/2024	111,615.9
	10	18	01/04/2024	30/09/2024	33,340.62
	10	19	01/10/24	31/03/2025	81,313.07
	11	20	01/04/25	30/09/25	8,659.81
	11	20	01/10/25	31/03/26	8,833.31
	12	21	01/04/26	30/09/26	8,570.36
	12	22	01/10/26	31/03/27	tbc

Total Receipts to date: £499,281.93

CIL Allocations and Expenditure to date

Expenditure/Allocations to Date

Year	Amount	Project	Committee	Spent/allocated	Wards
2019-20	£3,149	Street furniture	Environment	Spent	Fell, Castle, Mintsfeet, Highgate
2022-23	£31,000	20mph	Environment	Allocated *Some spends.*	Townwide
	£600	Serpentine trail	Environment	Spent	Fell
2023-24	£4,738	Railings	Environment	Spent	Fell
	£5,000	Water refill fountain	Environment	Allocated	Fell
	£10,000	Yards project	Environment	Spent	Highgate/Fell
	£25,000	Back to allotment reserve for Canal Head development	Allotments	Spent	Townwide
	£3,869	Green space and Tree management planning	Management/ Environment	Spent	Mintsfeet, Kirkland
	£4,725	Town Hall projector	Culture & Communities	Spent	Highgate, Fell
24/25	£50,000	Footpath renovation	Environment	Allocated	Townwide
	£50,000	Easy travel project	Environment	Allocated *Some spends.*	Fell
	£35,000	Pump Track	Environment	Allocated *Match-funding contribution to project confirmed*	Nether
	£5,000	Aynam Rd Fountain (reallocated	Environment	Spent	Fell

		from Birdcage project)			
	£90,000	Kendal Futures	Environment/C&C	Spent/ Allocated over three years	Highgate/Fell
	£15,000	Footpath design	Environment	Allocated (but not drawn down)	Mintsfeet
	£5,000	Christmas Lighting Infrastructure	C&C	Allocated	Highgate/Fell
	£4,500	Public realm	Environment	Spent	All
	£20,000	Footpath Improvements	Environment	Allocated *Some spends*.	All
	£15,000	Bus stop improvements	Environment	Allocated *Some spends*.	All
	£14,000	Development Fund project	TBC	Allocated	TBC at year end 2026.
25/26	£10,000	Explore Kendal	Environment	Spent	All
	£11,000	Explore Kendal New Totems	Environment	Allocated	Oxenholme
	£10,000	Vicarage Park Improvements	Environment	Allocated	Kirkland / Stonecross
	£16,667*	Stricklandgate House	Full Council	Spent	Fell/all
26/27	£20,588	Heron Hill lighting	Environment	Spent	Heron Hill
	£11,500	Pollinator planting	Environment	Spent	Strickland/ Heron Hill
	£12,000	New infrastructure	Environment	Allocated	Various
	£16,667*	Stricklandgate House	Full Council	Spent	Fell/all
Total	£483,336				
Remain	£15,945				

*will require further allocations or revenue funding of £16,666 to make up to £50,000 over three years.

Appendix 1 W&FC Advice on CIL

South Lakeland Community Infrastructure Levy (CIL) Advice Note for Parish/Town Councils outside Westmorland and Furness Community Infrastructure Levy (CIL)

Advice Note for Parish/Town Councils outside of the National Parks Revised March 2025 (v6)

1. Introduction

South Lakeland District Council originally approved the introduction of a Community Infrastructure Levy (CIL) for the district outside the National Parks, with effect from 1 June 2015. While SLDC was superseded by Westmorland and Furness Council on 1 April 2023, the new Council will continue to levy CIL within the former SLDC planning authority area outside the National Parks and continue to make payments due to Parish and Town Councils.

2. What is the Community Infrastructure Levy (CIL) and who collects it?

CIL is a charge on new development that will be collected by Westmorland and Furness Council to provide additional funding to help pay for the cost of infrastructure arising from new development such as highways and schools. CIL is charged on each square metre (sq m) of additional floorspace.

3. Will CIL replace Section 106 agreements?

No, Section 106 agreements will continue to fund affordable housing and essential site specific infrastructure required to enable development to take place.

4. What rate of CIL is levied?

The types of development on which CIL is (and is not) levied, and the latest CIL rates charged, can be viewed on the following Council webpage – CIL charges, exemption, penalties webpage. These rates are index linked annually to build cost inflation.

5. Who receives the CIL monies collected?

15% of CIL receipts will be passed to Parish/Town Councils from development in their area. Where an adopted Neighbourhood Plan is in place this rises to 25%. The District Council will use the remaining CIL receipts to fund strategic infrastructure, working with infrastructure providers. Up to 5% can be used to help meet the cost of setting up and administering CIL.

6. When do developers pay CIL?

CIL is paid in instalments over 2 months to 6 years, depending on the size of development when building works start. Planning permissions can be valid for three years, so it may be a number of years before significant CIL payments are received.

7. What can Parish/Town Councils spend CIL on?

Regulations state that Parish/Town Councils can spend their CIL funds on the following:

- The provision, improvement, replacement, operation or maintenance of

infrastructure; or

- **Anything else that is concerned with addressing the demands that development places on an area.**

If for any reason you are unsure whether a scheme or project falls within this definition please contact the District Council for advice.

8. What can Westmorland and Furness Council spend CIL on?

The District Council must spend CIL on strategic infrastructure that supports development. Infrastructure that might be funded through CIL can be found in the Infrastructure Funding Statement available on our Infrastructure Planning Policy Documents webpage.

How much CIL can Parish and Town Councils expect?

The level of CIL received will depend on the amount of development in a parish. For example, a Parish/Town Council would receive £750 of CIL for an open market dwelling of 100 sq m. This is based on a CIL rate of £50 per sq m, resulting in a total CIL payment of £5000, of which 15% amounts to £750. (Affordable and self-build dwellings may be eligible for relief).

9. When will Parish/Town Councils receive CIL funds?

The District Council will pass CIL receipts to Parish/Town Councils on a bi-annual basis.

- CIL receipts from 1 April to 30 September in any financial year will be passed to the Parish/Town Council by 28 October of that financial year
- CIL receipts from 1 October to 31 March in any financial year will be passed to the Parish/Town Council by 28 April in the following financial year.

10. How will Parish and Town Councils views on infrastructure priorities be taken into account?

The Infrastructure Delivery Plan sets out the Council's strategic infrastructure needs over the South Lakeland Local Plan period. The annually-updated Infrastructure Funding Statement, replaces the former Reg. 123 list, and sets out the Council's priorities for spending CIL in the former South Lakeland planning authority area of Westmorland and Furness. Town and Parish Councils will have opportunity to comment on future infrastructure needs in the context of future Local Plan preparation for Westmorland and Furness.

11. Can Parish or Town Councils pool their CIL funds?

Yes, Parish and Town Councils can pool their CIL funds to fund an infrastructure project if they wish, as long as it falls within the definition of what CIL can be spent on.

12. I'm in a Parish affected by National Park boundary changes. Will we get any CIL?

CIL will be payable on chargeable development approved before any boundary changes took effect. The Parish Council will receive its share of this CIL. The National Parks do not currently have a CIL. Following the boundary changes Westmorland and Furness Council will not apply CIL in the expanded National Parks and the affected Parishes will receive no further CIL from the District Council from development in these areas.

13. Can Westmorland and Furness Council spend CIL funds for a Parish/Town Council?

Yes, the District Council can retain and spend CIL monies for Parish/Town Councils if they do not wish to receive CIL. The District Council would then engage with the communities

where development has taken place and with the Parish/Town Council to agree how best to spend the 'neighbourhood' proportion of CIL.

14. Can a Parish Meeting receive and spend CIL?

A Parish Meeting is not a Parish Council and cannot receive or spend the 'neighbourhood' proportion of CIL arising from development in that parish. National planning guidance advises that in these circumstances Westmorland and Furness Council as the charging authority should retain the neighbourhood portion in these areas and engage with the communities and agree with them how best to spend the neighbourhood funding.

15. Are there any regulations on how Parish/Town Councils involve the local community?

It is up to you on how to involve the local community. There is currently limited guidance on this except that you should work closely with your neighbouring councils and the Westmorland and Furness Council to agree on spending priorities. Parish/Town Councils are encouraged to consider publishing their priorities for spending highlighting those that align with the District Council. A Community Plan or Neighbourhood Plan will help to identify local priorities.

16. What are the Parish/Town Councils reporting requirements?

You are required by legislation to publish a record each year of:

- total CIL receipts from the District Council;
- total expenditure of CIL receipts;
- a summary of what the CIL was spent on;
- total amount of receipts retained unspent at the end of the reported year from that year and previous years (if applicable).

This information should be placed on your website if possible otherwise you can ask the District Council to display this information on your behalf.

A copy of your annual report should also be sent to the District Council as charging authority, no later than 31 December following the reported year.

17. What happens if a Parish or Town Council doesn't spend its CIL receipts?

If you do not spend CIL funds within five years, or CIL has been spent on anything that does not meet the definition as set out within the CIL Regulations, you may be required to repay some or all of the receipts to the District Council.

18. Is there anything that Parish or Town Councils should do to prepare for CIL?

Although CIL was adopted by the District Council in June 2015, there is still time to consider how you will want to spend your proportion of CIL and to put any legal requirements in place. You may wish to think about the following:

- Do we have effective administrative processes in place that will allow the District Council to pass on CIL funds?
- Do we have effective reporting mechanisms to show how we have spent CIL?
- How will we decide what to spend CIL on?
- How will we engage with the community on how to spend CIL?

19. Will future changes to Parish boundaries affect the payment of the 'neighbourhood' proportion of CIL?

The District Council is required to pay the 'neighbourhood' proportion of CIL to the Parish

Council where the CIL-liable development is located. If the location of a CIL-liable development changes from parish A to parish B as a result of parish boundary changes, subsequent payments of the 'neighbourhood' proportion of CIL (including any remaining payments in a series of instalments) will be paid to the Parish or Town Council of parish B.

Further information

Further general information on CIL can be found on the government's Community Infrastructure Levy Guidance page and on our CIL webpages.

If you have any further questions regarding CIL please contact:

CIL/Section 106 Officer
Tel: 0300 373 3300 Email: cil@westmorlandandfurness.gov.uk

Appendix 2 KTC CIL Criteria

Kendal Town Council

Community Infrastructure Levy – Project Funding Criteria

CIL Background

As of June 2015, SLDC collect a Community Infrastructure Levey (CIL) on new development. CIL payments will be collected by SLDC to provide additional funding to help pay for the cost of infrastructure arising from new developments such as highways and schools. 15% of collected CIL receipts within Kendal will be passed on to Kendal Town Council.

Kendal Town Council can spend CIL on the:

- Provision
- Improvement
- Replacement
- Operation
- Maintenance

of local infrastructure or anything else that is concerned with the demands that development places on an area.

Kendal Town Council can, for example, support and in some case instigate deliverable projects that stand alone and provide additional community benefit above and beyond the major infrastructure projects delivered by SLDC. Kendal Town Council may decide to hold onto CIL funds until we get a larger balance to fund a larger project.

There is a future desire to involve local communities in selecting potential CIL projects.

Kendal Town Council CIL Criteria Background

The proposed criteria is a two stage selection process. Stage One filters potential projects via suitable core themes and stage two filters via value for money, maintenance, relevance to existing reports and output potential, see table below for project examples.

The core themes were purposefully selected to incorporate projects that benefit many within the community and the types of projects SLDC are unlikely to fund because they fall outside of SLDC's Infrastructure Development Plan and Regulation 123 List. However, Kendal Town Council recognise that SLDC & CCC also deliver a range of projects within Kendal which KTC may choose to support via its CIL allocation. Kendal Town Council will continue to liaise with SLDC & CCC to stay informed of potential projects to enable strong partnership working.

Kendal Town Council's CIL funding must support the recommendations of current key reports to ensure researched recommendations are actioned, at present these are;

- Kendal Town Council Action Plan
- Kendal Master Plan (SLDC) – to be published
- Kendal Transport Infrastructure Study (CCC, SLDC & KTC) – to be published
- Strategic Property Assets Review (SLDC) – to be published
- Environment Agency – Flood research output/recommendations
- Kendal Futures Economic Action Plan

All relevant CIL documentation will be forwarded to SLDC and be publically available on Kendal Town Council's website.

Kendal Town Council CIL Project Funding Criteria

Stage one – Does the proposed project adequately address one or more of KTC's core themes?

1. **Sustainable Connectivity** *(for example between new developments and Kendal town centre or other key nodes)*
2. **Town Centre Vibrancy** *(visually via public realm improvement projects and economically via tourism/promotional support)*
3. **Green Space Enhancement** *(for example, enhancement of habitats and the areas people go to enjoy green spaces)*

Stage Two – The project proposal should sufficiently answer the following questions:

- Is the project highlighted in current Town Council priorities and or current key reports?
- Will the project create value for money via a joint delivery approach or does opportunity to secure further match/contributions exist?
- Can the project independently cover any ongoing maintenance costs?
- Does the proposal evidence that the project will create positive outputs and outcomes and does it reinforce previous success?

Example Projects

Stage 1 Criteria Fit	Project Example	Indicative cost range
Sustainable Connectivity	**Signage Improvements** – simplify directional signage	Low
	Railway Station Improvements – Kendal & Oxenholme	Medium
	Continuous Kendal Riverside Cycling – Support permission process, clarity & signage	Low
	Multiuser Routes – For example, Lancaster Canal Towpath and Kendal Riverside	Low
	Improving Accessibility – For example, Kendal Castle Project	Low
	Riverside Landscaping – Improve paving quality between Abbott Hall Park and Lowther Street.	Medium
Town Centre Vibrancy	**Market Place** – support new Market stalls	Medium
	Birdcage Replacement – Create modern improved town centre focal point	High
	Heritage Style LED Street Lighting – Install along Finkle Street	High

	Urban Tree Planting – Support the reduction of high street clutter	Medium
	Yard enhancements via murals and improved signage	Medium
	Tourism Promotion – Support Kendal's visitor economy via Visit Kendal website, Kendal's promotional leaflets series and or events	Medium
Green Space Enhancement	**Abbot Hall Park** – continued support for current improvements	Low
	Castle Hill – continue support for current improvement project	Low
	Bowling Fell – Instigate project to improve access, viewpoints and visitor experience	Medium
	Nobles Rest – continue / increase scope of current improvement project	Medium
	New Road – utilise as a green space or improve current parking provision	High
	Riverside – paint railings a consistent colour	Medium
	Additional Planting / Trees – support projects where appropriate	Medium
	Pollinator Corridor – continue / increase scope of current project	Low

*High = £45,000+
*Medium = £16,000 - £44,000
*Low = Less than £15,000

Kendal Town Council CIL Project Funding Criteria Approved by Kendal Town Council Full Council in July 2017.