

AGENDA FOR OVERVIEW AND SCRUTINY COMMITTEE



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To: All Members of Overview and Scrutiny Committee

Councillors : R Bernstein, C Birchmore, A Arif, N Bayley,
N Boroda, D Green, N Jones, K Peel, T Pilkington,
D Vernon (Chair) and M Walsh

Dear Member/Colleague

Overview and Scrutiny Committee

You are invited to attend a meeting of the Overview and Scrutiny Committee which will be held as follows:-

Date:	Tuesday, 1 November 2022
Place:	Council Chamber, Bury Town Hall
Time:	7.00 pm
Briefing Facilities:	If Opposition Members and Co-opted Members require briefing on any particular item on the Agenda, the appropriate Director/Senior Officer originating the related report should be contacted.
Notes:	

AGENDA

1 APOLOGIES

2 DECLARATIONS OF INTEREST

Members of the Overview and Scrutiny Committee are asked to consider whether they have an interest in any matters on the agenda and, if so, to formally declare that interest.

3 MINUTES *(Pages 5 - 12)*

The minutes from the meeting held on 06th September 2022 are attached for approval.

4 MATTERS ARISING

5 PUBLIC QUESTION TIME

A period of 30 minutes has been set aside for members of the public to ask questions on matters considered at the last meeting and set out in the minutes or on the agenda for tonight's meeting.

6 MEMBER QUESTION TIME

A period of up to 15 minutes will be allocated for questions and supplementary questions from members of the Council who are not members of the committee. This period may be varied at the discretion of the chair.

7 REGENERATION UPDATE *(Pages 13 - 64)*

- A. Sir Howard Bernstein will be in attendance to answer any questions from members of Committee in relation to the work he is supporting regarding Radcliffe regeneration.
- B. Councillor O'Brien, Leader of the Council and Cabinet Member for Strategic Growth and Skills will present an overview of regeneration in the Borough at the meeting.

Attached are four reports:

- Ramsbottom Town Centre Plan
- Prestwich Town Centre
- Bury Business Improvement District (BID)
- Radcliffe Strategic Regeneration Framework

8 THE COUNCIL'S FINANCIAL POSITION AS AT 30TH JUNE 2022 *(Pages 65 - 90)*

Report of the Cabinet Member for Finance and Communities is attached.

9 MEDIUM TERM FINANCIAL STRATEGY REFRESH *(Pages 91 - 122)*

Report of the Cabinet Member for Finance and Communities is attached.

10 URGENT BUSINESS

Any other business which by reason of special circumstances the Chair agrees may be considered as a matter of urgency.

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Minutes of: OVERVIEW AND SCRUTINY COMMITTEE

Date of Meeting: 6 September 2022

Present: Councillor D Vernon (in the Chair)
Councillors R Bernstein, C Birchmore, A Arif, N Bayley, K Peel,
T Pilkington and M Walsh

Also in attendance: Lynne Ridsdale, Deputy Chief Executive (Corporate Core)
Paul Lakin, Executive Director of Place
Kate Waterhouse, Joint Chief Information Officer
Sarah Porru, Assistant Director of Regeneration Delivery
Chris Woodhouse, Strategic Partnerships Manager
Chloe Ashworth, Democratic Services

Public Attendance: No members of the public were present at the meeting.

Apologies for Absence: Councillor N Boroda, Councillor D Green and Councillor
N Jones

OSC.1 APOLOGIES

Apologies are noted above.

OSC.2 DECLARATIONS OF INTEREST

There were no declarations of interest.

OSC.3 MINUTES

It was agreed:

The minutes of the meeting held on 19th July 2022 be approved.

OSC.4 MATTERS ARISING

Councillor Vernon, Chair, advised the committee that as the last meeting took place virtually ratification of decisions made at the meeting on the 19th July 2022 be required.

It was put forward by Councillor Vernon and seconded by Councillor Bernstein and agreed unanimously that the actions be ratified.

OSC.5 PUBLIC QUESTION TIME

There were no public questions.

OSC.6 MEMBER QUESTION TIME (Pages 7 - 8)

One question was asked in advance of the meeting by Councillor Lancaster and is appended to the minutes.

OSC.7 COMMUNITY SAFETY PLAN

Councillor Gold, Cabinet Member for Finance and Communities provided an overview of the report. In January 2022, Overview and Scrutiny Committee received a report outlining the development of a new Community Safety Partnership (CSP) Plan for Bury. It was agreed that an update report to outline progress against the Plan would be presented to the Committee six months into delivery.

In addition, Chief Superintendent Chris Hill provided an overview in respect of Greater Manchester Police and locally in the Borough of Bury. Chief Superintendent Chris Hill advised the progressive steps have been taken towards the establishment coming out of special measures.

Councillor Vernon then opened to questions from Members of the Overview and Scrutiny Committee.

Members sought assurances on how Greater Manchester Police will continue to progress when released from special measures. In response Chris Hill, Chief Superintendent GMP advised that more work is needed on repeat demand and using a multi partnership approach to target areas of repeat hotspots.

Councillor Vernon questioned the priorities within the Plan which relate to drug related offending, domestic abuse, community cohesion, anti-social behaviour and reducing offending. It was asked, where does child protection fit, particularly as we have seen in neighbouring areas, Child Sexual Exploitation and what has been put in place to reduce any recurrences. In response Councillor Gold advised a co-ordinated approach is needed to help and protect children and adults at risk through collaborative working across organisations and agencies. In Bury, partner agencies have created all age safeguarding arrangements Chris Hill, GMP provided reassurance to the Committee that a multi-agency approach is taken.

Members sought assurances on how the increased use of buying and selling of Nitrous Oxide will be targeted. In response Councillor Gold advised Bury Council and partners have done community events to raise awareness of the dangers of Nitrous Oxide and influence the public's behaviour. As the cannisters are legal products with a legitimate use it prevents any ban on them being sold. The licensing and regulation teams have visited shops where they have been made aware Nitrous Oxide cannisters are sold to advise on the dangers and to encourage them not to sell to individuals where they feel there is a risk of them being misused. Further promotion of the dangers of such cannisters will be cascaded through schools and colleges as part of the start of a new school year.

In response to questions from Councillor Pilkington regarding hate crime Councillor Gold informed the committee that figures for hate crime have been down over the last two quarters and more detailed figures will be circulated following the meeting.

A discussion took place regarding the water safety and if work can be done to change the message from no open water to safe open water swimming. In response Kate Waterhouse, Joint Chief Information Officer advised that for Spring/Summer 2023 officers will be looking at incorporating a proposal for safer outdoor swimming.

Councillor Peel asked questions regarding increasing neighbourhood patrols. Chief Superintendent Hill responded by stating relationships are key to progress for Bury and the Police Force, Bury Council, Ward Members, and residents working together have resulted in

some proactive work taking place regarding road safety. There is a neighbourhood review currently taking place which ensure there is an increase in the number of officers and visibility and a reduction in demand.

Councillor Birchmore asked two questions relating to housing services and it was agreed that a response will be prepared through the Housing portfolio.

Questions took place regarding reducing the number of senior police officers. In response Chief Superintendent Chris Hill advised the purpose of the 'plan on a page' document is to ensure consistency across the Borough.

Discussions took place in relation to the effectiveness of the plan. In response Councillor Gold advised the plan is for three years and acknowledges that community safety is not any one agencies responsibility and needs a multi-disciplinary response. Members were offered an open invite to upcoming community safety partnership meetings.

Discussions took place regarding the night-time economy in Bury and the initiatives that support Bury being a safe and enjoyable place in the evening. The 'best bar none' initiative was further discussed, and Chief Superintendent Chris Hill advised it endures safety measures are in place in support people having a safe and enjoyable night and thanked street pastors for all their work.

Information regarding the Anti-social Behaviour Officer took place; he is on a fixed term contract and is an initial point of contact for anti-social behaviour casework. He will be taking statements and interviewing which will free up time for caseworkers who need to attend court.

It was agreed:

1. The Committee thanked Chief Superintendent Chris Hill, Councillor Gold, Cabinet Member for Finance and Communities and officers for their attendance and update.
2. Operation 'Lioness' to be circulated to members of the Committee
3. The holiday activities fund figures to be provided once received.

OSC.8 BURY TOWN CENTRE REGENERATION

Councillor O'Brien, Cabinet Member for Strategic Growth provided an overview of the Bury Town Centre Regeneration report. In the update Committee Members were advised Bury does provide a good offer for retail and is third best out of Greater Manchester and assured that Bury does not want to be complacent and that the regeneration should be a physical and people approach to regeneration that focuses on the future.

Councillor Bernstein, echoed confidence and ambition in the plan but sought assurances on capacity to deliver including the flexibility of the plan. In response Councillor O'Brien advised that whilst it is a big piece of work and will take time to be complete, the Council does have the resources needed to deliver along with the ability to be flexible and adaptable.

Councillor Peel raised points surrounding capacity for events and links to the Culture Strategy. Councillor O'Brien highlighted the flexi-hall which adds another layer of capacity to host events and attractions in addition to the offer already from the Met Theatre and additional hotel capacity.

Councillor Peel also highlighted the importance of residents having access to affordable credit, with an example being bringing Manchester Credit Union to Bury. In response Councillor O'Brien advised the Department for Work and Pensions has a Job Centre in the Mill Gate and

there is scope to expand this into better access to health, education, and skills to use spaces commercially and adaptably.

Councillor Birchmore sought assurances regarding the offer to new businesses and start-ups along with the SME offer. In response to the questions raised Councillor O'Brien advised the Economic Development Strategy has shown we have some of the best micro-business growth and most people are employed in the Borough within the Health or Retail sectors. The 'Invest in Bury Service' engages with businesses and the Made in Bury Service that provides support to businesses along with Greater Manchester support. In summary Councillor O'Brien advised there is a dedicated team that works with our partners to support businesses in the Borough. In addition, discussions took place regarding technology skills and age gaps in the profession. It was agreed that STEM and digital subjects are in demand and whilst the centre in Bury will be focused on health it will also take a digital approach.

Councillor Vernon questioned the numbers contained in report regarding housing. In response Councillor O'Brien informed members he will circulate these following the meeting but outlined the following:

Site	Number of homes
Q-Park	120
Townside (Pyramid Park)	175
Townfields Close	35
Humphrey House	40
Police station	50
Castle leisure complex	200
Site of former Paradise Mill, Parsons Lane / John St, Bury (Note: Council own reversionary freehold only, privately controlled)	30
Millgate	400
Corner Walmersley Road / Mborgate, Bury (partly Council owned)	30
Clerke St	30
The Castle surface car park, Bolton St	40
Belle Vue Terrace car park	26

Councillor Walsh sought assurances on the Mill Gate shopping centre and asked how much is owned by Bury council and will this be retained. In response Councillor O'Brien advised exact specifics are hard to comment on but confirmed the Council will retain their stake in the Mill Gate.

Councillor Birchmore highlighted the numbers on Metrolink users have now dropped significantly and questioned how this will impact bury town centre. Discussions took place and it was confirmed it is unlikely to be a detriment to Bury Town Centre and the reduction is typically from less commuters.

It was agreed:

1. Councillor O'Brien be thanked for his update.

OSC.9 URGENT BUSINESS

There was no urgent business.

COUNCILLOR D VERNON
Chair

(Note: The meeting started at 7.00 pm and ended at 9.40 pm)

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Question:

Please could the Chief Superintendent advise what action is being taken in respect of the obvious drug dealing and drug taking on the six-town housing estate on Coronation Road. We have many vulnerable elderly residents who are feeling intimidated in their own homes. Residents have requested more police patrols of the area, to tackle antisocial behaviour and the drug issues on the estate.

Answer:

I would like to thank Cllr Lancaster for raising these community concerns. There has been a twin track policing approach to addressing this issue, namely covert and overt. My neighbourhood team in Radcliffe have executed warrants in the locality over recent weeks under the Misuse of Drugs Act. They are working with our intelligence teams on developing further enforcement opportunities. In addition, our Challenger team have worked on tackling organised crime groups that supply drugs into the area.

The neighbourhood team are planning a dedicated policing operation and will be able to discuss this with you when you meet later this week.

My ask is for more community intelligence to be provided. This can be done directly with our neighbourhood officers or anonymously through the charity Crimestoppers on 0800 555 111 or through online reporting.

Supplementary Question:

Do the Police have a Crime Prevention Officer that can provide the Council and SixTown Housing with guidance and advice on security measures to the elderly residents on the estate. It would be helpful if they could attend a walk about with the Council on the estate to assess all doors on the estate which are owned by the Council to look at replacing the doors to composite doors. Composite doors keep the property safer, more secure, and thermally efficient.

Answer:

We do provide that reassurance and work with housing providers, including SixTown Housing and local neighbourhood teams. The local neighbourhood officer and PCSO would be happy to offer any reassurance regarding snap locks and composite doors.

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MEETING: Overview and Scrutiny Committee

DATE: 1st November 2022

SUBJECT: Ramsbottom Town Centre Plan

REPORT FROM:

Councillor Eamonn O'Brien (Leader of the Council and Cabinet Member for Strategic Growth and Skills)

CONTACT OFFICER:

Sarah Porru (Assistant Director Regeneration Delivery [Economy & Business])

1. BACKGROUND

- 1.1. In March 2021, the Council commissioned Layer Ltd to produce a town centre plan for Ramsbottom which would identify a series of potential proposals to improve the town for residents, businesses and visitors.
- 1.2. The Ramsbottom Town Centre Plan (hereafter known as the plan) sets out a series of high-level proposals and concepts that look to enhance the town centre for local residents, the business community and visitors. Proposals include creating quality workspace in the heart of the town, as well as identifying opportunities for improvements to the built environment, public realm and active travel routes.
- 1.3. The plan also looks at proposals to boost the visitor economy by providing some of the necessary infrastructure to facilitate the continuation and growth of the town's successful events programme. Likewise, the plan proposes to embrace the East Lancashire Railway as an important tourist asset, linking with the wider heritage and architectural character of the town.
- 1.4. The plan is an informal, non-statutory document that will help to shape and direct future investment into the town centre. It will also be a material consideration to which regard may be had in development control decisions relevant to the future regeneration of the town centre.
- 1.5. Following a period of public consultation, the final draft plan was approved by Cabinet in March 2022.

2. THE RAMSBOTTOM PLAN PROPOSALS

- 2.1. The plan includes the following vision for the Town Centre:

'Over the next ten years, Ramsbottom town centre will have built on its reputation as one of the best places in the region to live, visit and work. It will be an attractive

and vibrant destination for its residents, visitors and workers, supported by the East Lancashire Railway, a high-quality restaurant scene, a good range of independent retailers, a popular annual events programme and high-quality workspace for those wishing to base their businesses locally.

To support this, the town centre environment and experience of its users will be improved with new and enhanced areas of public realm and event space, improved linkages and better car parking arrangements that will encourage active travel and improve movement and circulation throughout the town.'

To help deliver the vision and further to public consultation, the plan identifies a number of proposals and opportunities for intervention to meet the aim of the vision:

- **New Public Square**

The addition of a new public square and events space in the core town centre to provide the infrastructure to enable the continuation and improvement of a successful events programme.

- **Improved Public Realm**

Establish a network of better-connected streets and spaces by improving existing infrastructure and creating new focal spaces and pedestrianised areas.

- **Active Travel**

Encourage active travel by improving strategic pedestrian and cycle links, connecting valuable green assets and amenities to the town centre such as Nuttall Park and new links to the river frontage.

- **Enterprise Centre**

A new enterprise centre is proposed for Market Chambers and the vacant upper floors of the Civic Hall. This will provide accommodation for a range of self-employed, freelance businesses and business start-ups, along with those residents seeking flexible and agile business space.

- **Car Parking Strategy**

The car parking strategy will aim to find a better balance for all users, including existing businesses and residents, and regular and occasional visitors. The plan proposes to introduce short stay car parking in the heart of the town, along with a residents' permit scheme and an edge of centre long stay provision which can accommodate longer stay and event parking.

3. CURRENT POSITION

- 3.1 Over the next 10 years, the plan will be used to guide interventions and support funding bids and opportunities to enhance the town centre. The proposals will be brought forward as these opportunities arise, with each being subject to wider stakeholder engagement.
- 3.2 A number of proposals have already been identified as priority projects. The information below explains progress to date.

- **Active Travel**

Greater Manchester has secured £1.07 billion of funding from the City Region Sustainable Transport Settlement (CRSTS) for transport and active travel proposals and work is currently ongoing to identify where this funding will be targeted. In the region of £2.3 million will be available to help deliver the active travel proposals and connectivity elements.

Pell Frischman (a firm of consultants) have been appointed to undertake the initial surveying work which will further support the early development stage of the schemes as per the plan. It is expected that their initial findings and indicative scheme designs will be available over the coming weeks.

The CRSTS funding will not be able to deliver the full spectrum of the projects identified for Ramsbottom and therefore priority projects will need to be agreed. In Bury, the CRSTS programme is overseen by the Council's Strategic Transport section who will consider the proposals in the strategic context of the emerging Borough-Wide Transport Plan and the Ramsbottom Town Centre Plan itself. Further funding will be identified and secured as the plans are developed in more detail.

- **Ramsbottom Enterprise Centre**

The Council has successfully secured £50,000 Evergreen funding from GMCA which could be used to help bring forward the proposed Enterprise Centre in the town.

Evergreen funding has been secured to support the redevelopment of Market Chambers and the unused, upper floor of the Civic Hall as an Enterprise Centre. A brief is currently being put together which will be used to procure a firm of consultants to undertake feasibility work to determine the buildings' capability, as well as potential design work and soft market testing to understand the local commercial market in terms of need and an exact end use. This could be in the form of flexible office space and meeting facilities (including education and training facilities), with the potential to also provide incubator space for growing new local businesses and makerspace for local entrepreneurs. This is partly in response to an increase in home/local working that has been accelerated by Covid 19.

- **Parking Strategy**

A draft high-level parking proposal is included in the plan, and this proposes to accommodate an events space in the core, establish a longer stay car park on the edge of the town centre, introduce shorter stay car park spaces in some locations and considers residents parking permits.

Post Covid restrictions, a full parking strategy is now being developed further to a town centre parking survey undertaken in September 2022. Work is now underway to analyse the findings.

Included in the parking strategy and schemes via the CRSTS, a traffic modelling system is being developed for Ramsbottom. This work is nearly complete, and once set up, the Council will be able to analysis various scenarios in the town centre to support further development of both the strategy and active travel proposals as per the plan.

- **Improved Public Realm / UK Shared Prosperity Fund (UKSPF)**

A funding proposal for public space enhancement has been included in Bury Council's UKSPF submission under the Communities and Place intervention priority. Once approved by GMCA, this funding will be used to procure a firm of consultants to undertake feasibility, design work and consultation to establish project briefs for two of the public realm proposals included in the plan. This includes the following proposals:

- *Square Street pedestrianisation* which is currently closed via a temporary licence under the Business & Planning Act (Regulations 2022).
- *Town Centre Events/Flexi-Space* (Saturday Market Site)

The two project briefs will allow the proposals to move to the implementation phase. Both projects link with other key council strategies and programmes – Active Travel and a borough-wide parking strategy. The funding for the feasibility will run from April 2023 to March 2024 but it is anticipated that work on the brief will commence as soon as possible.

- 3.3 The Economic Development & Projects service is in the process of establishing a high-level programme that will be used to monitor progress and implementation of each project within the plan, as well as identify further funding opportunities, interdependencies, track and report expenditure and assess and address any risks.

4. CONSULTATION/STAKEHOLDER ENGAGEMENT

- 4.1 The Council will continue to identify further opportunities to progress the high-level proposals set out in the plan to support and implement the vision for Ramsbottom Town Centre. The Council will work with key stakeholders in taking forward these proposals, ensuring that community consultation and engagement will be at the forefront of this process.

5. GOVERNANCE

- 5.1 The Council is in the process of determining appropriate governance for the likely programme of interventions that will meet the vision as set out in the plan. This is likely to be in the form of regular engagement with ward councillors and senior officers supported by reporting to the Council's Regeneration Board and Cabinet.

6. CONCLUSION

- 6.1 Through the successful implementation of the plan and over the next ten years, Ramsbottom Town Centre will further build upon its already success and will continue to be seen as a thriving centre for all that live, work and visit.

List of Background Papers: The Ramsbottom Plan

Contact Details: Sarah Porru (Assistant Director Regeneration Delivery [Economy & Business]) / s.porru@bury.gov.uk

Executive Director sign off Date: _____

JET Meeting Date: _____

SCRUTINY REPORT



MEETING: OVERVIEW & SCRUTINY

DATE: 1ST NOVEMBER 2022

SUBJECT: PRESTWICH TOWN CENTRE

REPORT FROM: MAJOR PROJECTS

CONTACT OFFICER: ROBERT SUMMERFIELD

1.0 BACKGROUND

- 1.1 Bury Council aims to provide a transformative regeneration programme in Prestwich Village. It is seeking to develop a new town centre that is inclusive to the local community, facilitating business growth, cultivating enterprise and delivering new homes, whilst injecting quality and economic resilience at the heart of a thriving town.
- 1.2 The Council and Muse Developments Ltd (Muse) have agreed to form the Prestwich Regeneration LLP (the JV) to bring forward a multi-phase, mixed use regeneration scheme. It will comprise a Community Hub accommodating Council services (library, adult learning and community / well-being space) and Public Sector partners (potentially the NHS and GPs). In addition, there is an opportunity to deliver a market (food and beverage), retail space for established independent traders, residential apartment buildings, town houses and a green travel hub / multi storey car park.
- 1.3 As part of the JV, the Council will deliver a Community Hub as part of Phase 1 of the Regeneration Scheme. This will be a key viability component in achieving the transformation of the existing Longfield Shopping Centre (LSC).
- 1.4 The development proposed by the JV equates to circa £100m worth of investment over the course of the 10 year JV Agreement which will help to deliver regeneration, economic growth and environmental improvements for the benefit of Prestwich residents and its communities.
- 1.5 The catalyst for the parties to work together was acquisition, by the Council, of the LSC over which Muse has an existing Option to Purchase. Muse will surrender or transfer the Option to the JV, at the point it is constituted and the JV has the necessary rights to drawdown the land from the Council as landowner (in phases) subject to a number of conditions being met as per JV Agreement.

- 1.6 The regeneration of Prestwich supports delivery of the *Let's Do It* strategy and the five themes that underpin the plan. The five themes embedded within the plan overlap to provide a coherent approach to how we design our Towns. As economic, retail and working patterns change, the Council will adapt its plans in line with the strategy to deliver sustainable communities, improve economic growth and reduce deprivation.
- 1.7 The Council and Muse have now agreed legal terms for the formal creation of the JV and are working to develop high level plans before returning to Elected Members for further guidance on a gateway basis.

2.0 JOINT VENTURE & PROGRESS

- 2.1 Over the last 12 months, significant progress has been made on setting up the JV itself alongside planning and development activity. The following provides an overview of the JV objectives, overall concept, sustainable development, communication and engagement, vacant possession, funding, and an indicative development programme for Phase 1.
- 2.2 The JV will develop these strategies in more detail as the scheme progresses through design briefing and business case development.

The JV Objectives

- 2.3 The objectives of the JV with Muse are described below:
 - to bring forward in a timely manner, and responding to market demand, the development of the Regeneration Scheme;
 - to secure returns to the Parties (commensurate with their investment and level of risk) and
 - to maximise profits, in accordance with the Master Plan and requisite planning permission;
 - to support the Council in pursuit of its wider objectives in helping to deliver the requisite homes and jobs that balance financial, economic and social returns;
 - to deliver and implement the Regeneration Scheme which shall:
 - deliver a new civic hub that connects people to public services and employment.
 - provide a range of new residential homes including townhouses and apartments.
 - provide good quality safe and secure car parking facilities.
 - provide a good quality public realm and new civic square.
 - provide good quality ground floor retail, food and beverage opportunities and business space.
 - to approve the design development and viability assessment for the Phase Development Plans.
 - to cultivate pride in Prestwich Town Centre through delivering quality.

- to create a safe, accessible and well-connected space which is pedestrian and cycle friendly.
- to facilitate a locally focused, investable economy.
- to improve the local environment of Prestwich.
- to ensure the Council is not exposed to undue financial risk and gains best value.
- to ensure and encourage additional private sector investment, capacity and capability which is enabled to support the broad regeneration objectives of the Council.

Overall Concept / Key Elements of the Masterplan – mix of uses

- 2.4 The Masterplan presents an opportunity for a transformational mixed-use redevelopment in Prestwich Village to bring about much needed intervention and improvement to the social, physical and economic environment of Prestwich Town Centre. The Masterplan will be a guiding template for future development but equally it is flexible and able to adapt to changes in the market to ensure pace of development is maintained throughout an envisaged delivery period of 10 years.
- 2.5 The Masterplan will be delivered in several phases, and it may well be necessary to change the sequencing and timing of individual phases in the future to adapt to prevailing market conditions and priority requirements at the time.
- 2.6 The Masterplan will respond to feedback from local consultation and stakeholder engagement undertaken by the JV. It will be a robust plan with built-in flexibility which meets the JV's objectives for the regeneration of Prestwich Village to redesign and redevelop the existing centre to transform it into a modern, thriving place with a bustling Community Hub, a new and vibrant market dedicated to quality food and fresh produce and an enhanced leisure and retail offer all positioned among new public realm.
- 2.7 Importantly, it also provides for much-needed new homes to bring residents back into the town centre. The strategic objective of the Masterplan is to regenerate the heart of the town centre through the introduction of a new Community Hub to bring high quality jobs, new services and community facilities into the town centre; and to provide an opportunity for further phases of development offering high quality homes in the form of town houses and new build apartments, as well as providing an enhanced retail, leisure and parking offer for the town's residents and visitors.
- 2.8 The introduction of much needed residential and retail / leisure development with inviting public spaces will bring residents and consumers back into the town centre and help to support the evening economy.
- 2.9 A new green travel hub incorporating cycle facilities and modern, safe car parking for visitors and residents will assist in supporting the comprehensive development and will link it to the existing highway network and a key public transport node.

Sustainable Development Strategy

- 2.10 A bespoke Sustainability Development Strategy will be utilised on the Regeneration Scheme. The Sustainability Development Strategy comprises the following Vision and Goals. The Vision is to create exemplar sustainable net-zero developments that maximise social benefits and enhance the environment for future generations. The goal is to build communities that are founded upon social value and health and wellbeing.
- 2.11 The following objectives will be the cornerstones of the Sustainable Development Strategy for all new projects and will have Target and Aspiration Key Performance Indicators identified for each one:
1. **Net zero carbon** – to be net zero carbon in construction and during operation
 2. **Enhancing biodiversity** – delivering a net gain in biodiversity, whilst delivering high quality green spaces
 3. **Circular economy** – eliminating waste and improving resource efficiency through circularity
 4. **Health & Wellbeing** – delivering high quality spaces where people can live, work and thrive whilst positively impacting their physical and mental health
 5. **Social Value** - The positive social, economic, and environmental outcomes that we create for individuals, businesses and the government through our development activities
 6. **Wider sustainability** - Capturing wider sustainability issues such as Water, Transport & Certification
- 2.12 A Sustainability Champion will be appointed to the Client team to manage the Sustainable Development Strategy and ensure the design teams are pushing hard to achieve the required targets.

3.0 COMMUNICATION & ENGAGEMENT

Local Engagement and Consultation

- 3.1 A The JV will fully engage with key stakeholders and the community groups and residents of Prestwich through responsive public consultation on the development proposals to ensure an inclusive approach. The incorporation of the JV presents an opportunity to build a long-term partnership that can renew and re-energise the communities in Prestwich.
- 3.2 In order to generate awareness, interest and support for the Regeneration Scheme, a meaningful programme of engagement with stakeholders and the local community is critical.
- 3.3 Engagement styles and techniques will be selected and specially tailored to inspire and involve the communities we are working with. This process includes

agreeing a communications protocol and plan at the outset to ensure the activity connects with and engages with a wide range of people and businesses.

- 3.4 To aid the communication process, a dedicated website and social media account has been established. The JV's approach will ensure that these digital channels of communication are maintained alongside more traditional targeted physical displays, one to one meetings, handouts and press articles.
- 3.5 This multi-channel approach will be progressed to ensure that the risks that arise during the life of the JV can be fully appraised and addressed through each phase of development. This staged process of implementation and review will also ensure that outreach activity and communication with various community groups is transparent about the steps involved with the redevelopment and transformation of Prestwich Village. The following provides the key messages for the Communication and Engagement strategy for Prestwich.

Key Messages

- A new community heart for Prestwich Village, with spaces for local independent businesses to thrive sitting alongside a mix of high-quality homes and a new community hub.
- An inclusive place designed for and with the people of Prestwich, which everyone can be proud of and champions the village's unique community spirit.
- An ambitious vision which will attract new residents and businesses, creating a new town centre destination and cementing Prestwich as one of the best places to live and visit in the North West.
- An exemplar in sustainability with net zero carbon buildings and green public spaces, enhancing the environment for future generations.
- Promoting health and wellbeing through family-friendly, social places to meet, creative spaces for art and culture and outdoor spaces for community events.
- Delivering benefits for local people, through £100m investment in the local economy and the creation of jobs, building a legacy of social value.

Communications Strategy

- 3.6 A communications protocol to cover all media relations has been developed and signed by both Muse and the Council. All media activity including press releases must be agreed by both parties prior to issue.
- 3.7 In support of the JV's development activities the communications team have established five key objectives:
- to increase the brand presence across the region and in the sector
 - to drive footfall to consultation events
 - to create a positive sentiment towards the Regeneration Scheme

- to increase advocacy in the local and regional residential and business communities
- to develop thought leadership campaigns in key titles positioned to highlight the JV's plans, achievements and investment opportunities

4. LOCAL ECONOMIC BENEFITS & SOCIAL VALUE

- 4.1 The JV understands the importance and opportunity of collaborating with the local and wider Manchester City Region community to bring about positive economic and social benefits, through the development of the Regeneration Scheme.
- 4.2 A Social Value strategy will set out the minimum expected targets and outline the framework against which a more detailed, comprehensive Social Value Plan (SVP) is to be developed and subsequently implemented for each phase of the Regeneration Scheme.
- 4.3 A Social Value Plan will be brought forward for each phase of and will consider:
- Employment Opportunities
 - Local Economy & Community
 - Safety, Health & the Environment

The JV will give consideration to the young and old, and the more vulnerable parts of the community to assess how we can assist them through the Regeneration Scheme.

5. LAND ASSEMBLY

- 5.1 The JV will require a specialist consultant to provide advice on the VP strategy to be adopted and to guide the land assembly process. Keppie Massie have substantial experience in this area of operation and will advise Muse and the Council on securing vacant possession of the LSC and wider land assembly and relocation strategies, undertaking negotiations as required, to enable the proposed Regeneration Scheme to be delivered.
- 5.2 Keppie Massie have undertaken an initial review of the scheme, documentation, tenancies and will produce an outline strategy which enable Vacant Possession of the site. There has been ongoing engagement with the tenants and lease renewals are being dealt with on an operational basis.

6. FUNDING

- 6.1 The key funding assumptions are as follows:
- In principle, the Council wish to provide the funding required to deliver the Phase 1 development including demolition of the LSC, site preparation, the Community Hub and associated infrastructure, utilities, public realm and landscaping. Other

potential elements of Phase 1 could comprise the green travel hub / car park and a small retail building to accommodate existing valued independent traders decanted from the LSC.

- Given that a high-level design is not yet fully complete, it is not possible to estimate the capital cost of delivery of the programme. In line with all large scale development projects, costs are estimated at specific gateway stages where viability is assessed on the basis of affordability and development appraisal. The next gateway stage for the project is RIBA Stage 1 (Preparation & Briefing).

7. INDICATIVE DEVELOPMENT PROGRAMME (PHASE 1)

7.1 An indicative Master Programme has been prepared. The key activities and assumptions for Phase 1 are summarised below for ease of reference:

Key Activities	Indicative Commencement Dates
Conclude JV Legal Agreement	October 2022
Commence Stage 1 Masterplan, Phase 1 business case and public engagement	October/December 2022
Commence RIBA Stage 2 design – Concept	February 2023
Commence RIBA Stage 3 design – Developed	July 2023
Submit Hybrid Planning Application	October 2023
Commence Stage 4 design and Procurement	July 2024
Latest date for Vacant Possession	November 2025
Start Demolition and enabling works	December 2025
Commence construction of phase 1	March 2026
Complete Phase 1	October 2027

7.2 Activity over the next few months will involve:

- Design planning and options appraisal including an overall site masterplan.
- Development of early-stage communications and engagement plans.
- Continued development of vacant possession strategy.
- High level consultation with the key stakeholders.
- Development of demand model for the Phase 1 Hub development and wider development.
- Parking demand study.
- Identification of grant and other funding opportunities.

List of Background Papers:

N/a

Contact Details:-

Ashleigh Williams, Major Projects Manager (Radcliffe)

A.Williams@bury.gov.uk

Robert Summerfield, Assistant Director of Regeneration

R.Summerfield@bury.gov.uk

Executive Director sign off Date: __18/10/2022__

Executive Team Meeting Date: _____



MEETING: Overview and Scrutiny Committee

DATE: 1st November 2022

SUBJECT: Bury Business Improvement District (BID)

REPORT FROM:

Councillor Eamonn O'Brien (Leader of the Council and Cabinet Member for Strategic Growth and Skills)

CONTACT OFFICER:

Sarah Porru (Assistant Director Regeneration Delivery [Economy & Business])

1. BACKGROUND

1.1. Business Improvements Districts (BIDs)

- 1.1.1 BIDs were first introduced in England and Wales through the Local Government Act in 2003 and there are over 300 currently operating across the UK, including Preston, Blackburn, Stockport and Altrincham and Rochdale in the North-West.
- 1.1.2 BIDs are business-led initiatives that aim to improve the economic prospects of a defined area through the delivery of short, medium, and long-term projects and initiatives that have been identified in consultation with the local business community.
- 1.1.3 BIDs are principally financed through a small, compulsory annual levy (from 1% to 2%) of the annual rateable value of businesses within the defined BID area. Monies secured are ring-fenced to support projects to improve the BID area as set out in a BID Business Plan.
- 1.1.4 Regulations require that BID funds are spent on new or expanded services and works that are over and above those provided by the local authority and that the proposed activity is set out in a BID Business Plan which acts as a manifesto for the creation of the BID.
- 1.1.5 To form a BID, businesses that are eligible for the annual levy (and are within the defined area) are asked to vote for or against a BID proposal via a confidential postal ballot. Eligible business premises (or hereditaments) receive one vote per hereditament. To establish a BID, it is necessary for 51% or more of voting business ratepayers in the proposed area (in terms of both absolute numbers

and rateable value) to vote in favour. Where a 'Yes' vote is returned, a BID Company is then established to deliver the BID. A BID can last up to 5 years and a further successful ballot is required for the BID to continue beyond that.

1.2. The Bury BID

- 1.2.1 In 2018, in recognition of the obvious benefits that a BID would bring to Bury town centre, including the opportunity to support business and grow the local economy, Bury Town Centre Management Board (BTCMB), with support from the Council secured a £36,000 loan from the MHCLG (now DLUHC) BID Loan Fund. The loan, along with match funding from the Council (£10,000) and BTCMB (£3,000) was used to appoint a BID consultant (Mosaic Partnerships Ltd) to undertake a BID Feasibility Study.
- 1.2.2 Following a period of business engagement and an assessment of business/town centre data, it was concluded that a BID could be a viable option and would potentially generate between £348,000 to £425,000 per annum to support business-led activity (based on a BID Levy of 1.5%). On the basis of the findings, the BTCMB took the decision to develop a full BID proposal.
- 1.2.3 In July 2019, Bury Council (as a key stakeholder, levy payer and having a statutory role in the BID process for undertaking the BID ballot and collecting the annual BID levy) took a paper to Cabinet that noted the BTCMB's decision to proceed to the full BID development and approved in principle, the associated BID costs to the Council.
- 1.2.4 Subsequently, the Bury BID Task Group that represented a range of stakeholders/sectors was formed and supported the BID consultant to develop a draft Bury BID Business Plan. Unfortunately, in March 2020 due to the impact of the Covid-19 pandemic, a decision by the BTCMB was made to pause further development of the BID. The process recommenced in May 2021 and work continued to develop the final business plan (appended to this report – Appendix 1)
- 1.2.5 The decision for the Council to support the final BID proposal (Business Plan) was taken at Cabinet in December 2021. The BID model will therefore help to deliver the Council's ambitions for Bury town centre and the town centre businesses, will create a strong/effective partnership approach and will be complimentary to the regeneration and development work of the Council, particularly linking to the implementation of the Bury Town Centre Masterplan and the emerging Economic Development Strategy that will support inclusive economic growth.
- 1.2.6 In particular the BID will: -
 - Help to enhance and promote the town centre to visitors, residents and investors by generating additional resources to support activity that would otherwise not

be delivered, and which would work alongside the Council's own investment in the regeneration programme.

- Help to deliver key Council ambitions, such as those expressed through the 'Let's Do It' Strategy.
- See the establishment of a Town Centre Management function for the BID area including a BID Manager and associated staff to provide an onsite resource for businesses and town centre users.

1.2.7 A BID ballot took place in March 2022 and returned a 'Yes vote' by both number and rateable value. On this basis the Bury BID Company was formally established in July 2022 and will be in place until 2027 when a further ballot will be required.

2. CURRENT POSITION/NEXT STEPS

2.1 BID Governance and Management

2.1.1 The BID will be governed by an independent, BID Company (not-for-profit company, limited by guarantee). The BID Company Board will have up to 15 directors made up of representatives from BID levy paying businesses. Additional non-levy paying members may be co-opted onto the Board, as required. The BID Board will serve voluntarily (without payment) and will comprise of business representatives that reflect the sectoral make-up of the BID area. The Board will be directly accountable to BID levy payers. Members of the BID Task Group have acted as an interim BID Board to establish the BID Company; full elections to the Board will take place once the BID is fully operating/processes are established.

2.1.2 A BID Manager, employed by the BID Company, will undertake the day-to-day management of the BID activity, including developing and delivering the BID Business Plan and providing a town centre management function focused on the BID area. An experienced interim BID Manager has recently been appointed who will ensure the delivery of priority activity/quick wins to support the town centre businesses. This post will also provide a vital resource in setting up the BID and recruiting the wider BID Team e.g., a BID Executive to provide day to day support and a team of Town Centre Hosts.

2.2 BID Business Plan

2.2.1 The Bury BID Business Plan (Appendix 2) sets out the key themes and high-level projects identified through the BID development process. These projects will be refined and developed by the BID Board and BID Manager but as such, they are:

-
- **Marketing, Promotion and Events:**
 - Destination and local marketing campaigns to promote the town and BID businesses.

- An annual events programme to raise the profile of the town centre and drive footfall and spend.
- **Improved Safety & Cleansing:**
 - Town Centre Ambassadors/Hosts - to provide a town centre presence, deterring shoplifting and antisocial behaviour and promoting the town by welcoming visitors.
- **Access and Facilities:**
 - Review of existing wayfinding and signage upgrades.
 - Car parking and public transport initiatives.
- **Business Support:**
 - An influential lobbying group, working on behalf of businesses.
 - Provide real support, particularly to small businesses through centralised procurement of services.
 - A Town Centre Manager for the BID area acting as one point of contact.

Projects which will attract footfall and reduce business costs have been identified as priorities.

2.3 Bury Council's Role and Responsibilities

2.3.1 BID Ballot

Local Authorities have a statutory duty to undertake the BID ballot on behalf of the BID proposer. Civica were engaged by Bury Council to manage and deliver the ballot process in March 2022.

2.3.2 Collection of the BID Levy

Collection of the BID Levy/Operating Agreement - Under BID legislation the local authority has responsibility for the collection and recovery of the BID levy on an annual basis and this will be undertaken by Revenues and Benefits. An Operating Agreement between the Council and the BID Company sets out the billing date, costs for the levy collection service, details of the BID levy to be charged and agreements around collection of any outstanding monies.

2.3.3 BID Levy Payments

As with other organisations and businesses the Council is liable to pay a BID Levy (1.5% of rateable value) on each of its hereditaments where business rates are payable. For Bury Council this will be in the region of £47,000 per annum. This funding, as part of the BID funds, will be used to deliver town centre initiatives to support Bury town centre.

2.3.4 Membership of the BID Board

As a BID levy payer, the Council will be eligible for a place on the BID Board. This responsibility will be undertaken by the Executive Director of Place.

2.3.5 BID Levy Advance

New BIDs often receive support from their local authority via a BID Levy Advance. This is where funds are advanced to the BID Company to help with the

initial BID setup and enable the early delivery of key projects. Equivalent funds are then retained by the local authority once the BID Levy has been collected. Bury Council are supporting the Bury BID with an initial release of funds to Bury BID

2.3.6 **UK Shared Prosperity Fund (UKSPF)**

A funding allocation of £129,000 has been included in Bury Council's UKSPF submission under the Communities and Place intervention priority. This amount will be matched against BID funds to support the delivery of activity in support of Bury town centre between 2022 and 2024.

3.0 CONCLUSION

The BID will be a key town centre stakeholder and will play an important role in the ongoing development and success of Bury town centre. The Council will continue to work closely with the Bury BID to ensure a strong and coherent approach to town centre regeneration.

List of Background Papers: -

- Appendix 1: Bury BID Business Plan

Contact Details: -

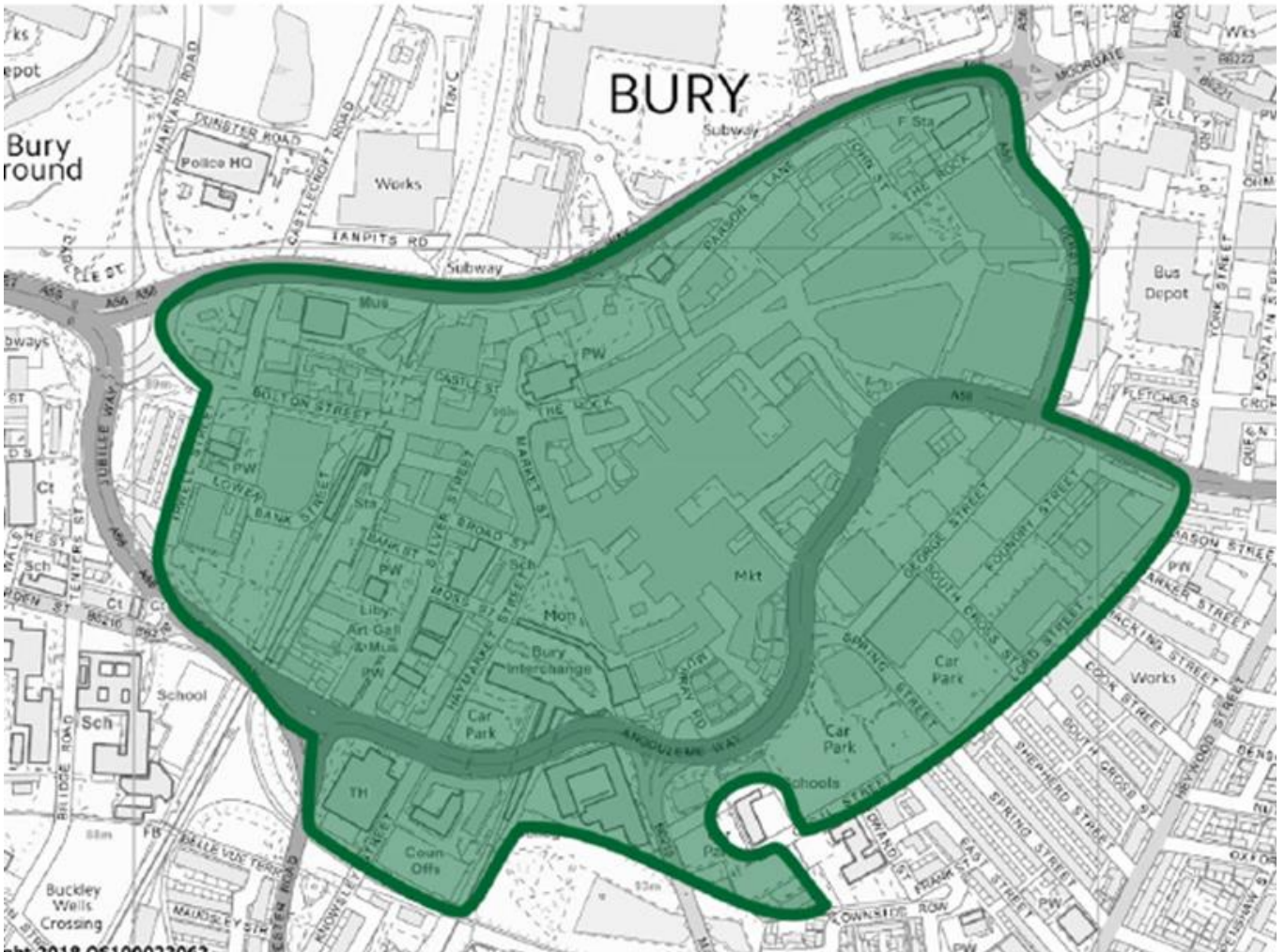
Sarah Porru (Assistant Director Regeneration Delivery [Economy & Business])
s.porru@bury.gov.uk

Executive Director sign off Date: _____

JET Meeting Date: _____

Appendix 1

Bury BID Map





Business
Improvement
District

mill gate

shopping centre





Bury needs additional investment and support to enhance its appeal as the best cultural destination in Greater Manchester. The BID will ultimately reduce business costs through joint negotiations as well as creating a central pot of funds to support our ambitions to make our town great. It is important that we work together to secure a YES vote in March 2022 to bring over £2m investment over 5 years to help shape the future of our town.

Victoria Robinson

CEO, The Met Art Centre & Chair of
Bury Town Centre Management Board

Introduction

Bury is a large market town serving the local community but it has the potential to be a great town that people will want to visit for a range of retail, hospitality and leisure experiences.

Located Greater Manchester, the town has good access to the M66 and is served by a tram and bus service. It is also home to several attractions and leisure facilities including the East Lancashire Railway, several museums, a gallery and The Met Theatre.

There are two shopping centres, The Rock and Millgate, plus the renowned Bury Market. Additionally the town centre has sizeable educational and health services footprint located in the BID area adjacent to the ring road which circles the town centre.

With so much to offer, Bury should be a vibrant and bustling town attracting much needed visitors with the capacity to spend in businesses. It seems however that a lack of a coordinated, curated approach to promoting these opportunities has resulted in our potential not being achieved. Together we are aiming to change this.

The process of developing a BID started in 2019 assessing the viability of a Business Improvement District which would allow for a cohesively managed and marketed location. The onset of restrictions related to COVID 19 meant that the development work was suspended from early 2020. With the reopening of the Town Centre and businesses in a fuller way it was felt that the development of the BID will aid the recovery effort now underway and will help drive forward the changes that will ensure Bury will survive as a competitive centre.

The BID Task Group is made up business representatives who have worked voluntarily to move this project forward in an enormously challenging time.

This business plan has evolved following extensive discussions and contributions by businesses across all sectors and geographical locations. It has highlighted the need for a comprehensive marketing strategy and the need to address, safety and cleanliness, wayfinding and business support for Bury's businesses. We must adapt and evolve to survive in these very challenging times.

Bury BID Task Group

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Having been an independent business located in the town centre for over 11 years, I have seen how the town centre has changed over the years & how we are slowly seeing the erosion of our footfall to on-line shopping & other retail hubs that are now able to compete with our strong retail visitor experience. COVID has brought more challenges as well. It is clear that now more than ever that business, stakeholders & communities work together to secure the future of our beloved town. It is important that we are able to share our voice & our visions & to agree on the important issues within the town centre, to enable its' growth & development into the future. By uniting & working together we will all see a greater return for our BID investment which will result in greater security for our businesses, greater community spirit, a greater town centre experience for our customers & staff.

Victoria Kay
Owner, Barista

Business Improvement Districts Explained

WHAT IS A BID?

BIDs are an arrangement whereby businesses come together and decide which improvements they feel could be made in their town or city centre, how they will implement these improvements and what it will cost them. BIDs are financed and controlled by the businesses within the selected area. BIDs deliver additional projects and services over and above those already provided by public bodies.

WHY DO BUSINESSES SUPPORT BIDs?

A BID is a mechanism which allows businesses to raise a sum of money to manage and deliver projects that they have identified and believe will improve their trading environment, ultimately increasing trade for those businesses who are paying for the improvements.

WHO PAYS FOR A BID?

Once projects and services have been agreed by businesses, along with how they are going to be delivered and managed, they are costed and set out in a detailed business plan. The cost to each business is worked out on a pro rata basis. 'This is called the 'BID LEVY'. An independent and formal vote then takes place on the agreed projects and services and if the majority vote is YES then ALL eligible businesses within the BID area HAVE to pay. The BID levy is normally paid by the occupiers of a property. In addition, BIDs can draw in other voluntary funding, grants and 'in kind' contributions to supplement the BID levy.



HOW DOES AN AREA BECOME A BID?

Normally a 'BID Task Group' is set up which is responsible for putting together a detailed business plan setting out the projects it aims to deliver on behalf of the businesses in the BID area. This is based on a detailed consultation process with businesses. The business plan will include the projects, cost, delivery guarantees, performance indicators and the management structure. A confidential postal vote is held with all the businesses that would pay the BID levy getting a vote. To become a BID a majority of those that vote must be in favour by number and rateable value. A successful BID then has a mandate for a maximum of 5 years after which the BID would need to seek a re-ballot.

HOW IS A BID MONITORED?

Like any good business plan, specific key performance indicators (KPIs) are set and performance is monitored against the KPIs by the BID board. The BID Company is answerable to the businesses that pay the BID levy, and will be required to monitor and inform its members on its progress towards the agreed KPIs.

DOES THIS MEAN THE LOCAL AUTHORITY WILL STOP DELIVERING SERVICES?

No. BID money can only be used to carry out projects/services ADDITIONAL to those that public services have to provide. Prior to the BID business plan being produced, the current services being delivered by all public agencies including the Local Authority and Police are set out in Baseline Statements.

Baseline Statements for the following areas are available for the Bury BID:

- Car Parking
 - CCTV
 - Street Cleansing
 - Grounds Maintenance
 - Public Conveniences
 - Police
-

This means the Local Authority continues to deliver that level of service. The BID company can agree to provide additional resources to deliver a higher level of service over and above the benchmarked level if this is what businesses have identified they want.

400+
Businesses

40+ Streets

£26M

Total Rateable Value

Raising
£400,000
levy per year



**Investing Over £2m over
the 5 year life of the BID**

Key Project Areas



Marketing, Promotion
& Events



Safe & Clean



Access & Facilities



Backing Business

The Opportunity

This is your opportunity to see Bury realise its potential through a Business Improvement District (BID) over £2m investment over 5 years to shape the future of the town. Over the development period, businesses in Bury town centre have been telling the BID Team how they would like to see it improved. Open business meetings, surveys, one-to-one discussions, zoom workshops and presentations have formed a detailed consultation process about the BID's priorities. This document sets out what Bury town centre businesses have said they would like a BID to deliver.



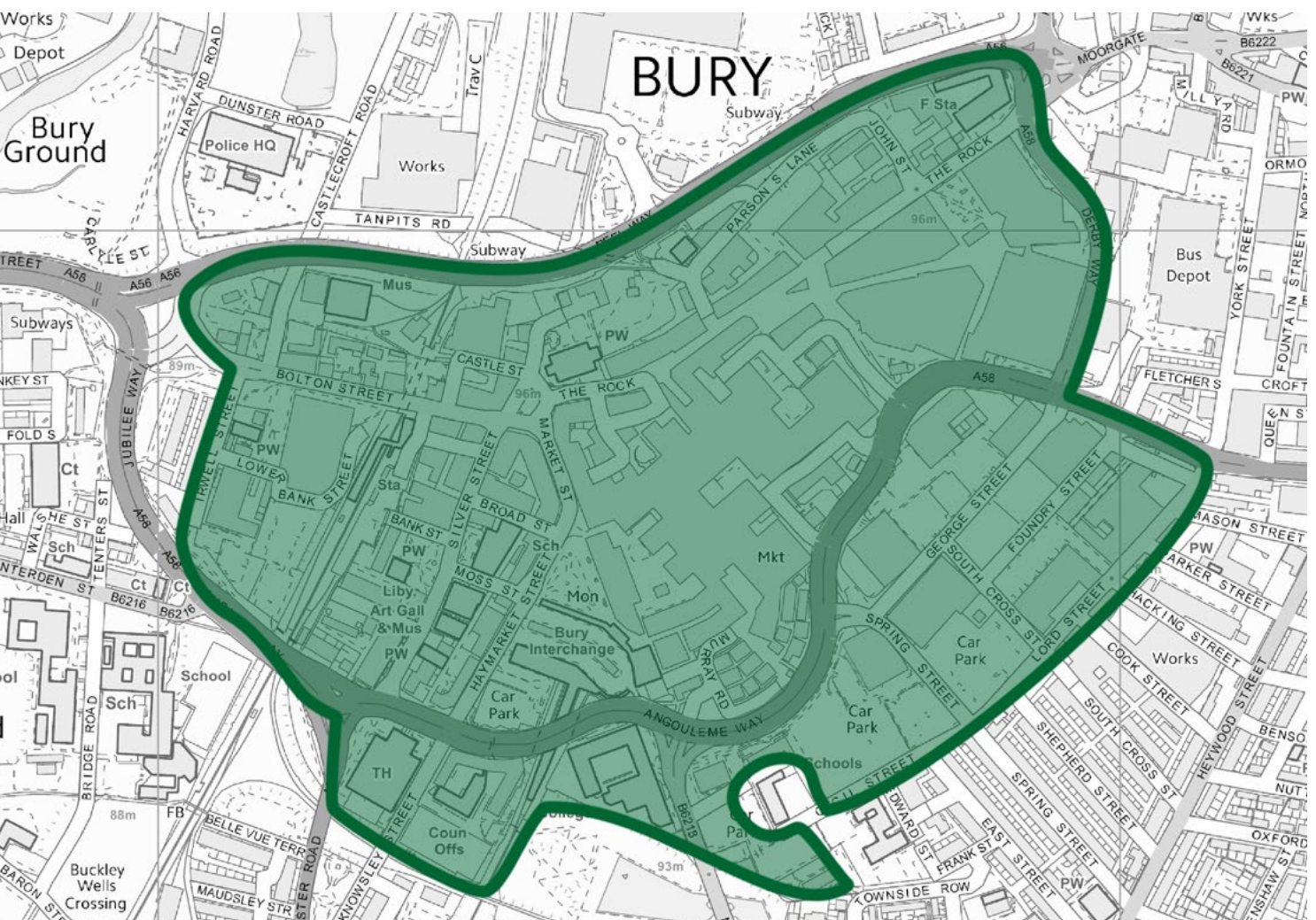
For a BID to be introduced, the vote must meet two conditions:

Over 50% of businesses that vote must vote in favour of the BID

The businesses that vote yes must represent a greater total rateable value than those that vote no

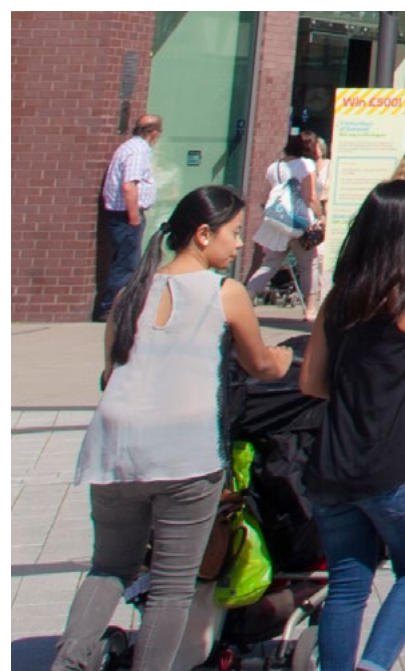
Over 300 BIDs have been set up in the UK already, all investing in their local priorities. This includes towns and cities in the north west including Manchester, Rochdale and Stockport with others in development.

The BID Area



List of Streets

- | | |
|-------------------------------|------------------|
| Angouleme Way | Market Parade |
| Bank St | Market Place |
| Bolton St | Market St |
| Broad Street | Minden Parade |
| Bury Indoor Market (The Mall) | Moss St |
| Bury Market (Murray Rd) | Parsons Lane |
| Castle St | Princess Parade |
| Castlecroft Rd | Rock Place |
| Central St | Silver St |
| Clerke St | South Street |
| Cooper St | St Johns Gardens |
| Crompton St | St Johns Square |
| Cross St | St Marys Place |
| Derby Way (Part) | Tenterden St |
| Duke St | The Haymarket |
| Foundry St | The Mall |
| George St | The Rock |
| Goodall St | The Square |
| Haymarket St | The Wyld |
| John St | Tithebarn St |
| Kay Gardens | Trinity St |
| Knowsley St | Union Arcade |
| Manchester Rd | Union St |



The Consultation Process So Far

The BID Team and Task Group have been talking with businesses in Bury to understand how the town centre can be developed in order to address business concerns, interests and priorities. This valuable information has been collected through a number of channels:

March 2019

BID Feasibility Study completed

September 2019

The BID development phase commences. Consultation with businesses continues and the Task Group is expanded. There are face-to-face visits and workshops to which businesses are invited. Additionally, there are meetings with key stakeholders & public agencies.

March 2020 – April 2021

The COVID-19 pandemic and consequent lockdown and restrictions means the BID development process is put on hold. Some online consultation and BID Task Group meetings continue.

April 2021

BID process recommences

July 2021 – January 2022

Business Engagement & Consultation

February 2022

Final Business Plan circulated



We will be celebrating 42 years in Bury Town Centre this year and have always believed Bury has a diverse offering both in retail, hospitality and leisure. A BID will help cement it's future to strengthen our town even further for a safer future for generations to come.

Coleen Rhodes

Owner David Spruce Footwear

What's Next?

Businesses within the BID area will receive a ballot paper by post. The vote to establish a Business Improvement District for Bury is then formally open. From this date businesses can complete and return their ballot papers to Cives Election Services, the independent agents acting on behalf of Bury Council's Returning Officer.

16 February 2022

Notice of Ballot

02 March 2022

Ballot Papers Posted Out

30 March 2022

Close of Ballot

31 March 2022

Declaration of Result

The BID Projects



Marketing, Promotion & Events

£1,050,000 over 5 years

You told us:

Individual organisations are working hard to promote and market their elements and businesses, but because the effort is not 'joined up', we aren't all pulling together across a single sector, let alone the whole town. Visitors either come to shop, use services or to visit attractions but not both and we need to work on this. We want to have a cohesive offer of all our assets; the museums, the gallery, The MET and shops and cafés.

The BID could deliver:

- Develop a marketing plan and campaigns that will include destination and local marketing to promote the Town and BID businesses. This will include conventional and online marketing platforms to promote all the town has to offer including culture, heritage, hospitality and retail.
- An annual events programme to continuously raise the profile of the Town Centre and drive footfall and spend.
- Work with partners in the culture and heritage sectors to ensure that we are adding value to their campaigns.



Improved Safety & Cleansing

£375,000 spend over 5 years

You told us:

We are very concerned about the rise in anti-social behaviour in the town centre. There have been acts of vandalism and windows have been broken. Some parts the town look dirty and unloved and the presence of charity collectors and unauthorised buskers is off-putting for visitors.

The BID could deliver:

- Town Centre Rangers to provide 'boots on the ground', deterring shoplifting and antisocial behaviour and promoting the town by providing information and guidance to visitors.
- An expanded programme of services such as Retail Radio and Pubwatch, creating a more welcoming and safer environment both day and night.
- Targeted cleansing, gum and graffiti removal will not replace but will be in addition to the service provided by Bury Council.
- We will enhanced planting and displays around the town where appropriate.



Access & Facilities

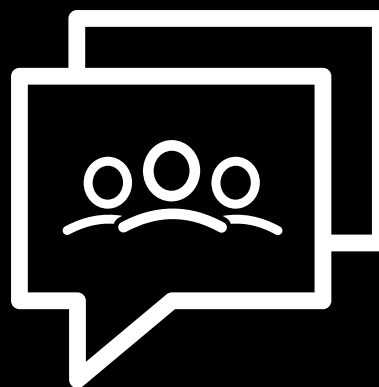
£375,000 over 5 years

You told us:

Visitors head for The Rock or the Market and don't seem to know how to find other parts of the town. We really should improve the wayfinding and signage to encourage visitors to move around the town more. Also as a small business my own staff find it difficult and expensive to park

The BID could deliver:

- Deliver wayfinding and signage in partnership.
- Car parking and public transport incentives including working with car park operators to look at subsidised/ discounted car park for staff and assist business where the only option is to use the car
- Lobby to ensure high quality public conveniences
- Improve the appearance of the Town through elements such as enhanced floral displays, dressing of vacant units and festive and decorative lighting



Backing Business

£100,000 over 5 years

You told us:

We need a strong voice representing business and lobbying for the changes that we need. We must make sure that the town centre gets the funding it deserves so we are not left behind.

The BID could deliver:

- An influential lobbying group, working on behalf of businesses to ensure that your views are heard and represented at the highest level by all relevant agencies. This will include shaping policy with local in areas such as the Masterplan.
- Provide real support, particularly to small businesses through centralised procurement of services such as trade waste management and recycling, thereby reducing your costs.
- We will also provide free relevant training in areas such as social media.
- Ensure that Bury Town Centre will be able to in a position to take advantage of any stimulus funding and support as we come out of the pandemic.
- Provide a single point of contact and accountability for businesses through a Town Centre Manager

BID Levy

What Will You Pay?

If there is agreement to formally go down BID route and businesses vote 'yes' for the Bury BID, the levy will raise approximately £400,000 per annum for five years this equates to over £2m over 5 years to deliver improvements that will directly benefit you.

If the BID vote is successful, all eligible businesses will pay a levy of 1.5% of the rateable value of the business per annum. Small businesses, with a rateable value of less than £12,000, will be exempt from paying.

The table below gives an example of what the BID levy could be for your business.

Rateable Value	Maximum Annual Levy	Maximum Daily Equivalent Cost
£10,000	£150	£0.41
£25,000	£375	£1.03
£50,000	£750	£2.06
£100,000	£1,500	£4.11
£200,000	£3,000	£8.22

Additional Income

BIDs across the UK on average generate 20% in additional income through their lifetime, Bury BID will endeavour to do this through sponsorship, grant funding and other income generating activities. It is expected that this form of income will generate an additional £80,000 per annum to be invested back into the projects outlined in this plan.

Voluntary Membership

A voluntary investment can be made by businesses that are exempt such as those that have a rateable value under £12,000 and those outside the BID area. This will entitle them to all the projects and services outlined in this business plan as well as full rights as members in the management and governance of the BID company. Details and eligibility will be set by the Board.



The aspirations of the Bury BID closely align with the College's vision of providing excellent outcomes and positive futures for the individuals and communities we serve. We look forward to building on our existing employer and stakeholder relationships and working together to further improve opportunities for Bury's local businesses and its citizens.

Paul Maykels

Director Strategic Development, Bury College

BID Income & Expenditure Forecast

	2022/23	2023/24	2024/25	2025/26	2026/27	Totals
Income						
BID Levy	£400,000	£400,000	£400,000	£400,000	£400,000	£2,000,000
Additional Income	£80,000	£80,000	£80,000	£80,000	£80,000	£400,000
Total Income	£480,000	£480,000	£480,000	£480,000	£480,000	£2,400,000
Expenditure						
Marketing, Promotion & Events	£210,000	£210,000	£210,000	£210,000	£210,000	£1,050,000
Safe & Clean	£75,000	£75,000	£75,000	£75,000	£75,000	£375,000
Access & Facilities	£75,000	£75,000	£75,000	£75,000	£75,000	£375,000
Backing Business	£20,000	£20,000	£20,000	£20,000	£20,000	£100,000
Sub Total	£380,000	£380,000	£380,000	£380,000	£380,000	£1,900,000
Overheads						
Staff	£80,000	£80,000	£80,000	£80,000	£80,000	£400,000
Office/IT	£10,000	£10,000	£10,000	£10,000	£10,000	£50,000
Insurance	£1,000	£1,000	£1,000	£1,000	£1,000	£5,000
Levy Collection Cost	£8,000	£8,000	£8,000	£8,000	£8,000	£40,000
Legal and Professional Fees	£1,000	£1,000	£1,000	£1,000	£1,000	£5,000
Sub Total	£100,000	£100,000	£100,000	£100,000	£100,000	£500,000
Total Costs	£480,000	£480,000	£480,000	£480,000	£480,000	£2,400,000

BID Governance & Management

If the BID ballot is successful, an independent, not-for-profit company, limited by guarantee, will govern the BID. The board will have up to 15 directors made up of representatives of levy paying businesses. Additional non-levy paying members may be co-opted, as required.

The board will serve voluntarily (without payment) and will be composed to reflect the make-up of the BID area in business sectoral terms. The board of directors will be directly accountable to BID levy payers for:

- Effective delivery of the projects and services as set out in the BID business plan.
- Upholding and promoting the BID's vision and objectives.

Board elections will be held where any levy paying business or equivalent financial contributor will be eligible to stand as a BID board director. Nominated representatives from Bury Council and the Police will also be present at board meetings.

All levy payers will have a stake in the BID company. They will control what the BID funds are spent on and can hold the BID company accountable throughout the duration of the five years.



The BID company will not be able to make a profit and any surplus must be spent on projects and services agreed by levy payers and the board of directors.

In Year 1, the BID Task Group normally form the interim Board until preparations can be made for a full election. Board elections will be held and any levy paying business or equivalent financial contributor will be eligible to stand as board director. Nominated representatives from public sector will be invited to the board meetings but will not have voting rights unless they are formal directors of the company.

Any levy payer or voluntary contributor can stand to be elected onto the board during this process. Board positions are laid out below (up to 15 in total):



5 Retail



2 Office/Commercial



2 Food/Drink/Leisure



1 Public Sector



1 Education Sector



1 Tourism Sector



1 Property Owner



**2 Voluntary Contributor/
Investor Member**

**REMEMBER THE BURY BID
IS DEVELOPED, MANAGED
AND CONTROLLED BY
YOU, THE BUSINESSES**

Measuring Results

Bury BID and its board will keep levy payers up to date on all the projects that the BID will implement over the 5 year term in a variety of ways. It will demonstrate that it is delivering against its objectives. The board will set the key performance indicators (KPIs) and criteria upon which to measure the BID's performance. Examples of the criteria the BID will use include:



Footfall figures



Visitor numbers



Rental levels



Car parking usage



New business activity



Annual surveys



Business feedback



Consumer feedback



Media coverage



Website/social media interactions



Businesses pay an annual amount, collected once a year. This income is then used year-by-year over the 5 year lifetime of the BID to carry out the projects defined in this business plan. BIDs are funded by the businesses within the BID boundary.

If businesses vote 'yes' for Bury BID, it will raise over £400,000 pa, for five years, to deliver improvements that will directly benefit you. If the BID vote is successful, all eligible businesses will pay a levy of 1.5% of the rateable value of the business. Small businesses, with a rateable value of less than £12,000, will be exempt from paying.

Performance measurement will be carried out at regular intervals and the results will be reported back to levy payers through the following channels:

- Annual meetings
- Group liaison forums and briefings
- Direct communications (for example: e-bulletins, newsletters and face-to-face meetings)



Mill Gate Shopping Centre supports the Bury BID as this provides all stakeholders with an opportunity to work collaboratively. This would ensure we invest in shaping the future of our town centre and would encourage people locally and beyond to visit Bury.

Kirsty Williams

Centre Manager, Mill Gate Shopping Centre

BID Levy & Ballot Rules

The BID Regulations of 2004, approved by the Government, sets out a regulatory framework within which BIDs have to operate, including the way in which the levy is charged and collected, and how the ballot is conducted.

The BID levy rate will be fixed for the full term of the BID (five years) and will not be subject to inflation or alterations.

The BID levy will be applied to all businesses within the defined area with a rateable value of or exceeding £12,000, provided they are listed on the Non Domestic rates list as provided by Bury Council for the 'Chargeable Date', set annually.

The following will be exempt from paying the levy:

- Organisations with a rateable value below £12,000.
- Non-retail charities with no trading income, arm or facilities and are predominantly volunteer based.
- Non-profit making organisations with an entirely subscription and volunteer-based set up.
- Businesses that fall in the following sectors: industrial, manufacturing, storage, workshop.

Eligible ratepayers within a managed estate such as a shopping centre, arcade or paying a service charge will receive a discount of up to a maximum 30%. This will dependent on the management providing a service charge schedule for the BID to assess the actual level of discount annually. If no satisfactory service level schedule is provided then the full levy rate will apply in those Managed Estates.

All educational facilities within the BID area will receive a 50% discount on the BID Levy payable.

New businesses will be charged from the point of occupation based upon the rateable value at the time they enter the rating list.

If a business ratepayer occupies the premises for less than one year, the levy paid will be on a daily basis.

BID Levy payment will revert to the property owner or the registered business ratepayer of vacant properties. Those undergoing refurbishment or being demolished will be liable to pay the BID levy.

The BID levy will not be affected by the small business rate relief scheme, exemptions, reliefs or discount periods in the non-domestic rate regulations prevailing at the time.

VAT will not be charged on the BID levy.

The levy rate or boundary area cannot be increased without a full alteration ballot. However if the BID company wishes to decrease the levy rate during the period, it will do so through a consultation, which will, as a minimum, require it to write to all existing BID levy payers. If more than 25% object in writing then this course of action will not proceed.

The billing body is authorised to collect the BID levy on behalf of the BID company.

Collection and enforcement regulations will be in line with those applied to non-domestic business rates, with the BID company board of directors responsible for any debt write-off.

The BID funding will be kept in a separate BID revenue account by Bury Council and transferred to the BID company.

BID projects, costs and timescales may be altered by the BID board of directors, provided they remain in line with the overall BID objectives.

The BID board of directors will meet at least six times a year. Every levy paying business and equivalent financial contributor will be eligible to be a member of the BID company. Company members can vote at annual meetings.

The BID company will produce a set of annual accounts made available to all company members.

The BID will last for five years. At the end of the five years, a ballot must be held if businesses wish the BID to continue.

The Ballot

All eligible businesses have the opportunity to vote.

The ballot will be conducted through an independent, confidential postal vote by Civica Election Services, on behalf of Bury Council, which is the responsible body as determined by the BID Regulations of 2004.

Each eligible business ratepayer will have one vote in respect of each hereditament within the BID area, provided they are listed on the National Non Domestic Rates List for the defined area as provided by Bury Council.

A proxy vote is available and details will be sent out by the Ballot Holder.

Ballot papers will be sent out to the appropriate person/organisation.



I have worked in Bury for over 30 years and during that time it has changed beyond recognition. New and improved shopping and leisure facilities have been created and as a result Bury has become a popular destination for shoppers and visitors alike. To make sure that people keep coming we need to give them reasons to come back. A BID will enable Bury to do that by coordinating and promoting the great things that we have to offer from Bury's Famous Market to The Fusilliers Museum. Having a vibrant town centre makes it a great place to work and to attract the best people to work in our businesses. The BID will inject extra funds into our local economy to spend in the way that the businesses have chosen for themselves so that we can all benefit.

Fiona Gaskell

Partner, Clough & Willis Solicitors

For the BID to go ahead, two conditions must be met:

More than 50% of businesses that vote must vote in favour.

The businesses that vote 'YES' must represent more than 50% of the total rateable value of all votes cast.

The results of the ballot will be declared on 31 March 2022.

Under the BID Regulations of 2004, if the BID is approved at ballot by businesses, all those eligible, regardless of how or if they voted, will be legally obliged to pay the annual levy amount.

Your BID Team

The Bury BID has been guided to this point by a Task Group, of local business people, champions and stakeholders who are passionate about the future success the town centre:

Bury BID Task Group

Victoria Robinson
The Met Art Gallery

Michael Shroot
WHN Solicitors

Paul Maykles
Bury College

Graham Leigh
GLP Law

Victoria Kay
Barista Café

Anthony Popadic
BoHAIRmia

Matthew Kendall
Newtons

Lee Hollingworth
Automatic

Arnold Wilcox Wood
The Rock

David Jones
Kwoff

Fiona Gaskell
Clough Willis

Coleen Rhodes
David Spruce

Kirsty Williams
Mill Gate

Rachel Crossley
Nationwide

Jill Youlton
Bury Council



The Bury BID is an opportunity to bring together all the major players in a partnership which helps to deliver stronger, economic success to the benefit of businesses in Bury Town Centre.

The Council are developing a new masterplan to guide the future of Bury town centre and to attract inward investment such as a new town centre hotel, Levelling up Funding for the Market Flexi Hall, and a funding for a new interchange. The BID, through the proposed Business plan, will help to ensure the town centre not only recovers from the impact of Covid 19 but that it goes from strength to strength as a place to live, visit and do business.

Councillor Eammon O'Brien
Leader, Bury Council



Why Vote Yes For a BID in Bury?

The old ways of managing town centres and doing business seems no longer to be working. Customers and visitors have increasingly sophisticated expectations, the trading environment is in flux and public sector funding is increasingly challenged.

The COVID-19 pandemic has accelerated changes which had already been foreseen and businesses must now adapt and organise themselves to optimise the opportunities that exist. A BID provides the structure and means to drive and deliver change in the town centre.

A BID enables you, the businesses, who have a vested interest in ensuring the town centre thrives, to sit in the driving seat, ensure sustained income, make the decisions and deliver the projects that will improve your trading environment.

More Information

To find out more about the Bury BID contact
Sue McGeown, Senior Project Manager:

sue@themosaicpartnership.co.uk

07766 915111

or visit

www.burybid.co.uk

SCRUTINY REPORT



MEETING: OVERVIEW & SCRUTINY

DATE: 1ST NOVEMBER 2022

SUBJECT: RADCLIFFE STRATEGIC REGENERATION FRAMEWORK

REPORT FROM: MAJOR PROJECTS

CONTACT OFFICER: ROBERT SUMMERFIELD

1.0 BACKGROUND

- 1.1 Radcliffe is at the centre of an unprecedented transformation programme and the area has been identified by Bury Council as a focus area for regeneration and growth over the forthcoming years. In September 2020, a Strategic Regeneration Framework (SRF) was adopted for Radcliffe which set the long-term vision for the regeneration of the town through the delivery of a programme of capital investment projects.
- 1.2 The regeneration of Radcliffe supports the overall mission of the *Let's Do It* strategy and will increase economic growth whilst reducing levels of deprivation in this key part of Bury. As we move towards a future in urban areas where people travel less, buy locally, work and access local services, we need vital and liveable neighbourhoods. This means the Council must think carefully about neighbourhoods and how they can be either built or re-designed to work well. Strategic investment in Radcliffe town centre and the delivery of the new high school, Hub project, and residential developments as outlined in the SRF are fully aligned with this vision; with capital developments acting as enablers to realising key objectives and benefits in Radcliffe.
- 1.3 Our Corporate Plan 2020/22 sets out key themes, principles, and deliverables to support the Borough of Bury as it recovers from the local impact of the Covid-19 pandemic and builds a better and brighter future for our population, communities, and businesses. Major capital construction projects offer a significant opportunity to support local economic recovery and deliver tangible social value. In partnership with our selected contractors and development partners, Community Hub manager and council service leads, the project team will be seeking to support job creation, the implementation of apprenticeships, skill enhancement programmes and placement opportunities with local education providers. Wherever possible, we will seek to utilise a local supply chain for labour, services and materials. Moreover, our construction contracts will reflect within agreed KPIs, active engagement with and support for, a wide range of community based and charitably supported projects and programmes at a local level.

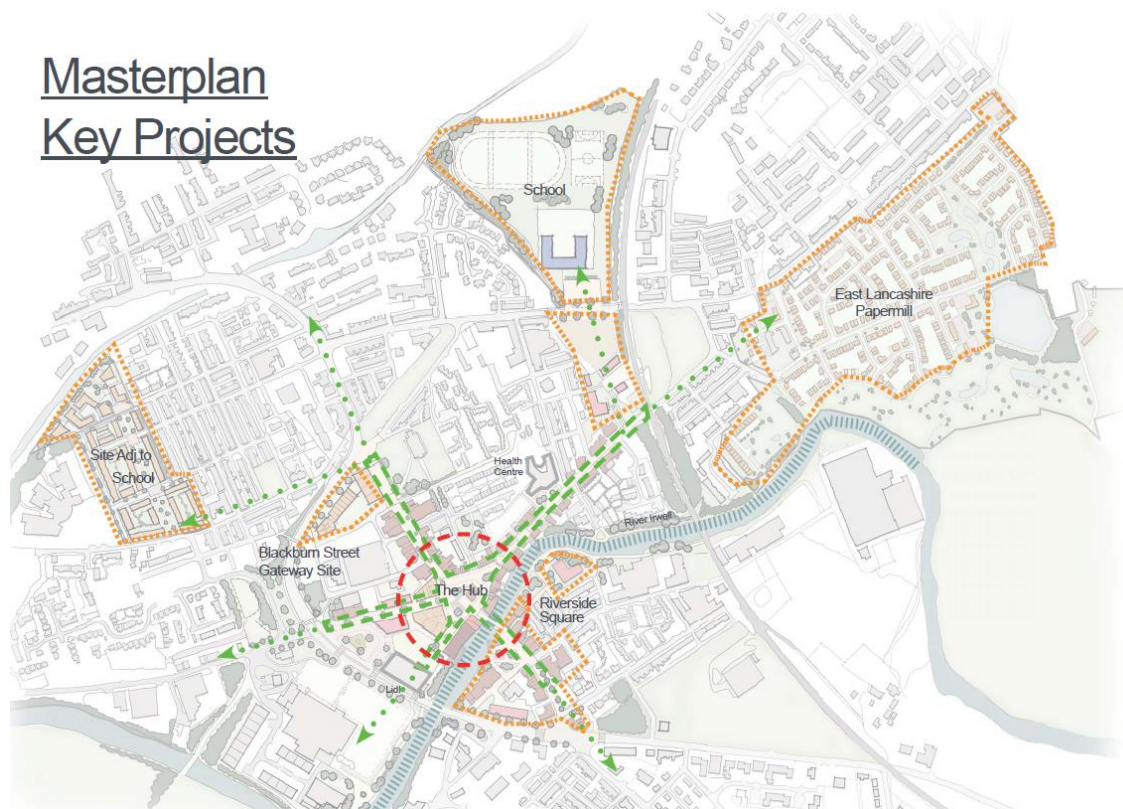
- 1.4 The regeneration proposals will also support national policy objectives relating to the 'Levelling Up' agenda. The Council submitted a bid to round one of the Levelling Up Fund bidding process and was successful in securing £20m for the delivery of the Radcliffe Hub. This was supplemented with match funding from Bury Council via its capital programme.

2.0 RADCLIFFE STRATEGIC REGENERATION FRAMEWORK (SRF)

- 2.1 Bury Council published the Radcliffe Strategic Regeneration Framework in 2020 to guide the direction of the town's growth over the next 15 years. The programme objectives are underpinned by numerous strategic drivers:

- **Socio-economic need** - acute deprivation, poor health, low educational attainment, constrained opportunities for enterprise and employment.
- **Environmental decline** - town centre decline, limited commercial offer, external investment constraints.
- **Operational challenges** - fragmented civic estate, loss of the temporary leisure centre, constrained community facilities.
- **Opportunities** – availability of brownfield land, OPE agenda, connectivity to GM, funding opportunities (public and private), success of Radcliffe Market, blue and green infrastructure.

- 2.2 In response, the SRF outlines a series of realistic short, medium and longer-term actions to guide Council investment to create a distinctive well connected healthy town, that unlocks hundreds of new homes, acts as a catalyst for the recovery of the high street and attraction of new investment opportunities, and facilitates employment growth.



2.3 Key SRF deliverables currently being implemented are:

- Delivery of a new secondary school.
- Creation of a new build civic hub that facilitates public services, education and wellness facilities all under one roof.
- Refurbishing and repurposing the historic market chambers and Radcliffe Market basement to create commercial retail and F&B space, alongside events space for community use and private functions.
- Creation of new employment space, business incubator enterprise centre and coworking space.
- A whole town approach to housing – facilitating the comprehensive approach to residential development.
- A programme of strategic investment projects to improve and enhance multi modal transport provision – supporting sustainable future growth and active travel.

3.0 SRF DELIVERY PROGRAMME - UPDATE

3.1 Radcliffe Secondary School

- 3.1.1 The Department for Education (DfE) has approved the establishment of the new secondary school to be located off Spring Lane and confirmed that Star Academies will be the sponsor of the school.
- 3.1.2 DfE is responsible for the delivery of the project to construct the new school but the Council retains a significant interest in providing the land on which the school is to be constructed, and ensuring the project aligns to the wider ambition of the SRF.
- 3.1.3 The Council has led a project group comprising DfE and Star for some time to ensure timely delivery of the project, and to enable a mechanism to address any barriers to delivery.
- 3.1.4 Whilst focused on timely delivery of the project, the Council has also had to ensure that access to the prospective development site to the North of the school site is preserved, and also have regard to the impact of the delivery of the project on the two existing users on the Spring Lane site, Spring Lane School and the Leisure Centre.
- 3.1.5 As with all Free School projects, the Council is also responsible for specific costs, and these have also been addresses as part of the project development.
- 3.1.6 To date, the Council's Cabinet has agreed details in terms of the Land to be subject of a 125 year lease, on which the school has been site, and also approved capital funding to meet the Council's financial obligations.
- 3.1.7 The Council has commenced pre-application discussions with the DfE advisers in respect of planning and highways issues, and these will continue as detailed designs are progressed.

3.1.8 The DfE is now close to confirming the detailed programme for delivery of the project. The position at mid October 2022 is:

- DfE to confirm appointment of developer imminently.
- Detailed delivery programme expected late October. The provisional programme is:
 - Planning application to be submitted January 2023.
 - Planning permission secured April 2023.
- Start on site July 2023. Initially this will focus on construction of the access road, and then the main school building to the North of the site.
- Between January & March 2024 release of the balance of the Spring Lane site to enable construction of the all-weather pitch and grassed area. The actual date will be confirmed as part of the detailed programme. The Pupil Referral Unit (Spring Lane School) and the Leisure Centre will need to vacate the site by this point.
- Completion of main building and immediate infrastructure, car parks, hard play etc. – August 2024.
- Completion of all-weather pitch – October 2024.

This programme enables the school to open to its first cohort of pupils in September 2024.

3.1.9 Plans have been developed, and funding put in place to enable the Pupil Referral Unit to be relocated to new premises in 2023, thereby releasing that part of the site within the programme timescales.

3.1.10 A project group has been established by Operational Services to plan for the de-commissioning of the current leisure centre, and an interim programme of activity until the new town centre facility is commissioned. The actual de-commissioning date will be determined by the detailed programme for the construction of the new school (ie between January and March 2024).

Site Masterplan – Radcliffe Secondary School

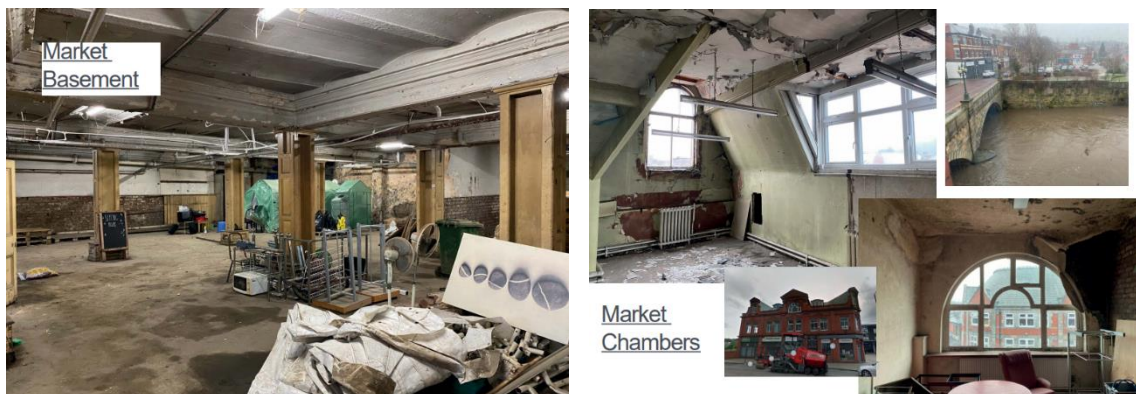


3.2 Radcliffe Hub, Market Chambers & Market Basement

- 3.2.1 Creation of a Hub, the refurbishment of the Market Chambers and Radcliffe Market basement space are designed to promote integrated service delivery including access to enhanced leisure, learning and skills provision, complemented by infrastructure to create a supportive environment for enterprise (co-working, incubator) and cultural engagement.



Existing leisure and town centre retail units



Existing Market Basement and Market Chambers Building

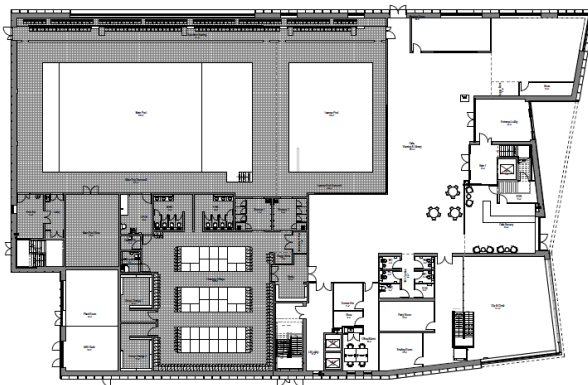
- 3.2.2 The project proposes significant investment to clear poor quality, obsolete buildings and deliver a high-quality hub as a focus for community leisure, recreation, learning, health and work. New facilities will be designed to exemplar standards of sustainability and inclusive and accessible design, with a focus on flexibility of use and maximising space utilisation.
- 3.2.3 Diversification of the facilities within the town centre is intended to increase footfall and dwell time, thus supporting the prosperity of new and existing

businesses within the core of the town, with a capacity to accommodate future growth. The provision of wet and dry leisure facilities, a library and information centre and community space will be set within a high-quality civic environment, and will act as a focus for wider investment, broadening the appeal of Radcliffe.

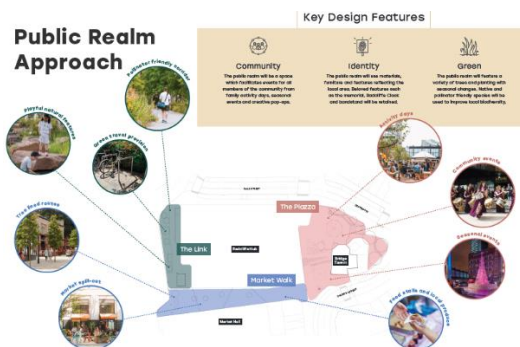


Proposed Hub CGI

3.2.4 The Hub will provide a platform for integrated service provision based on enhanced coordination between teams within the Council, NHS, other public sector partners and local community organisations. Flexible workspace will be open to these teams, supporting referral and joint action to ensure the most challenging groups benefit from Levelling Up.



Proposed ground floor layout and first floor library concept design



Proposed concept designs for Market Chambers and public realm

3.2.5 Refurbished and new build high quality commercial office and retail space will be created within this central campus of buildings, benefitting from an enhanced public realm with improved access to both the piazza, new courtyard and balcony spaces adjacent to the River Irwell, and improved connectivity to public transport and active mode infrastructure.

Radcliffe Hub Delivery Programme

3.2.6 The table below outlines the high-level delivery milestones associated with construction of the Radcliffe Hub development and progress to date.

Radcliffe Hub Delivery Milestones

Activity	Timescale	Progress
LUF Bid submission	June 2021	COMPLETE
First Stage Tender Process	June - August 2021	COMPLETE
Contractor Selection	August 2021	COMPLETE
Agree and enter into PCSA	September 2021	COMPLETE
Contractor Mobilisation	October 2021	COMPLETE
Commence Project Development (PCSA)	October 2021	COMPLETE
LUF Award Decision	October 2021	COMPLETE
RIBA Stages 2-4	Nov 2021 - Feb 2023	IN-PROGRESS
Planning Submission	January 2023	
Enabling Works Package (PCSA)	Jan - May 2023	
Stage Two Tender Period (4 weeks)	March 2023	
Approvals	April 2023	
Enter into Main Construction contract	May 2023	
Construction works (all phases)	May 23 – Autumn 2024	

Communication and Engagement

3.2.7 In order to ensure that the project proposals are co-designed with key stakeholders, and that community engagement remains central to this approach, the Project Team have progressed several key elements of the Communications and Engagement Strategy:

- Radcliffe Regeneration Office – opened in September 2021, the office operates as a 'drop in' space, where members of the public can access design information and speak directly with officers leading the project. The office is open to the public two days a week and has welcomed over 480 visitors over the past 12 months
- Newsletter – the first edition of the *Regenerating Radcliffe* newsletter was launched in July 2022 and distributed to 17,000 households across Radcliffe Wards and directly to local sports clubs, community groups, charities, and businesses. The newsletter will be published every six

months and will provide updates on progress and promote upcoming engagement events.

- Community Engagement Events – the Project Team have hosted a range of events; displaying design information, delivering presentations to outline project progress and host Q&A sessions; consultation workshops for specific groups such as sports clubs, youth groups, local businesses and suppliers, residents and public sector partners; attendance at community events hosted at the leisure centre, Radcliffe Market and Radcliffe Football Club; attendance at community group meetings by request. Feedback questionnaires have been made available at the most recent events and the Project Team are currently compiling a '*you said, we did*' report to distil how these responses have been incorporated into the project proposals. The report will be shared directly with those who took part and will be available online.
- Online Information – the Regeneration webpages feature a range of design information and FAQs, along with contact details for the Project Team (email contact and dedicated telephone number). A dedicated microsite is currently in development which will feature enhanced interactive content.
- Social Value Delivery Plan – working with our construction partner Vinci and extended design team and supply chain, this delivery plan outlines project opportunities for job creation, apprenticeships/placements, skills and training opportunities, community project support, connection with local education providers, and promotion of local supply chains. The Project Team have hosted a '*meet the buyer*' event at Radcliffe Market to connect local businesses with Vinci's commercial team, we have attended meetings with Radcliffe primary school Head Teachers to outline how we will work with the proposed Pupil Parliament, host STEM focused assemblies and '*have a go*' events linked to construction careers, and link the construction project to school curriculum to engage directly with pupils and their families. A Community Project Pitch event is planned for later in the year, which will offer local community groups and charities the opportunity to access support from Vinci.

3.3 Residential Development

- 3.3.1 The SRF identified that successful towns provide the right mix of housing to support the local population. Radcliffe has a relatively young population and entrepreneurial spirit. There is an opportunity for new market creation in the core and periphery with the introduction of live-work units and higher density development. To retain residents in Radcliffe larger residential sites should look to provide homes for families. Development should be sustainable and be of exceptional design quality, opportunities to include eco-homes should be considered. Increasing the resident population will provide footfall and increase expenditure in the core of the town. New housing developments therefore must provide strong linkages to the core.

Brownfield Development

3.3.2 A number of projects are ongoing which will bring forward a significant quantum of homes within the Radcliffe SRF area. Each development will deliver a mixture of accommodation types, including affordable homes.

School Street

3.3.3 A Cabinet paper will be presented to October 2022 Cabinet to seek approval for formalise a contractual arrangement for development of the site with developer, Hive Homes. This will enable the construction phase of the development to move forward.

3.3.4 The proposed School Street development will deliver 91 family homes, 23 of which will be affordable. The development phasing for this project is as follows:

Timescale	Activity
June 2021 – COMPLETE	GMCA BHF bid development works
October 2021 – COMPLETE	Cabinet approval for disposal
October 2022	Cabinet approval for revised site offer from Hive Homes
December 2022	Planning submission by Hive Homes
May 2023	Construction starts
September 2025	Construction complete



Proposed School Street Development and design image

Green Street Apartments

3.3.5 The Council has now exchanged contracts with Watson Homes to enable the development to progress. The project will deliver 132 new homes, 97 of which will be affordable.

3.3.6 The development phasing for this project is as follows:

Timescale	Activity
October 2021 - COMPLETE	Cabinet approval for site disposal
October 2022	Submission of Planning Application (Watson Homes)
April 2023	Construction start on site
August 2025	Construction works complete



Proposed Green Street Development and design image

East Lancashire Paper Mill (ELPM)

3.3.7 The development is being brought forward in partnership with Homes England. It is currently the largest brownfield housing site in the Borough and will deliver 400 new family homes (100 affordable) alongside upgrades to the nearby cricket club, which will be relocated on the site.

3.3.8 Homes England and the Council are supporting Morris Homes in the development of their planning application (reserve matters). It will be submitted to the Authority for review at the end of the year.

3.3.9 The proposed development phasing for the project is as follows:

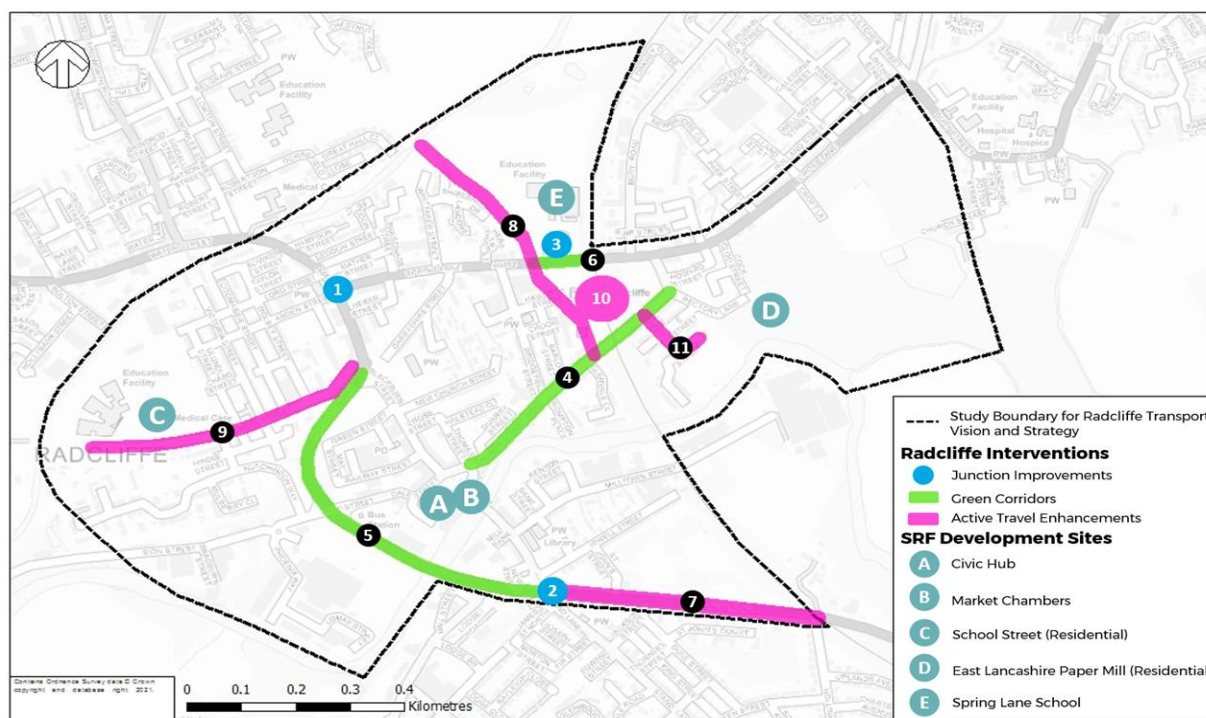
Timescale	Activity
December 2021 – COMPLETE	Procurement of developer for the ELPM site.
March 2022 – COMPLETE	Cabinet approval of successful development tender.
December 2022	Reserve Matters Planning submission received by Bury Council.
August 2023	Construction start on site.
September 2029	Construction works complete.



3.4 Radcliffe Strategic Transport

- 3.4.1 The development of a transport strategy for Radcliffe has been undertaken in two phases.
- 3.4.2 The initial Radcliffe Transport Vision focused on the types of access, movement and public realm interventions that will be delivered in Radcliffe to respond to current and future transport challenges, as well as being able to support proposed new development and align to the transport aspirations set out in GM2040 Transport Strategy.
- 3.4.3 Given the timescales for submission of Bury Council's Radcliffe LUF bid and the importance of developing the supporting public realm scheme for the Civic Hub, this Vision document looked at an outline design and high-level costs for the supporting public realm scheme in specific detail.
- 3.4.4 Following on from the Transport Vision, the full Radcliffe Transport Strategy was developed, taking a more detailed look at the specific access and movement interventions needed over the next 10 years in Radcliffe. This longer-term strategy document considered the implications of relevant local and regional strategies and policies, including the GM2040 Transport Strategy and supporting GM2040 Five-Year Delivery Plan, as well as potential funding opportunities.
- 3.4.5 Together, the Radcliffe Transport Vision and Radcliffe Transport Strategy provide a coordinated plan for transport investment in Radcliffe over the next 10 years and beyond, with the following transport investment priorities identified:
- To deliver a high quality, safe and attractive public realm.
 - To deliver a comprehensive active travel network.
 - To support public health and climate change.

- To enhance the arrival experience for visitors travelling into Radcliffe by public transport.
- To develop a strategy for car parking.
- To enable the proposed SRF development sites to come forward in a sustainable manner.



Proposed Transport Interventions

3.4.6 The City Region Sustainable Transport Fund provided the first opportunity to secure funding for Radcliffe’s transport priorities. In September 2021, Greater Manchester submitted a £1.19 billion bid to this fund which included a bid for the transport investment priorities identified in the Radcliffe Transport Strategy. In July 2022, Government confirmed funding for Greater Manchester of £1.07 billion for the five-year period 2022/23 – 2026/27 and approved an investment programme which includes £9 million for active travel schemes in Radcliffe. Work is now underway to develop the proposals, which will need to meet national and regional design standards for cycling and walking, and to prepare the business cases needed to access the funding through Transport for Greater Manchester. Public consultation will be carried out on the proposals in due course.

3.5 North Block and wider regeneration opportunities

3.5.1 The Council has recently commissioned Deloitte LLP to work up development options for the future of the Radcliffe North Block, acquired by Bury Council in May 2021.

3.5.2 The North Block site is a crucial part of the Radcliffe Town Centre regeneration programme. Successful re-development will build on the landmark ‘hub’ project being delivered by the Council on the South Block.

- 3.5.3 Deloitte LLP will develop a comprehensive development strategy for the site alongside proposed actions to overcome inherent viability issues. The commission will suggest statutory compliant procurement and development options to create a fit for purpose strategy which links to the wider development context of Radcliffe.
- 3.5.4 The Deloitte work will also build on parking survey work recently carried out by WSP LTD to deliver a robust parking strategy to respond to the construction and operation of the Radcliffe Hub building.
- 3.5.5 The commission began in October 2022 and will report back in mid-December.

3.6 UK Shared Prosperity Fund (UKSPF)

- 3.6.1 Proposals are currently in development to bring forward an improved pocket park in the town centre, which will connect with the town centre regeneration projects across the River Irwell via enhanced public realm. The project will focus on three key objectives:
- Improving everyday access to green spaces, linking active travel routes, enhancing existing ecological habitats, and nature educational opportunities.
 - Create inclusive opportunities to rest and play.
 - Create opportunities to link regeneration placemaking with community space; via community gardening spaces, public art, improved wayfinding and connectivity to the town centre.



The existing site



The existing site



Site location in wider context

- 3.6.2 In accordance with the UKSPF cashflow forecast, the delivery of the project will see design development brought forward over the next six months, with works commencing on site in Summer 2023.
-

List of Background Papers:

N/a

Contact Details:-

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Roz Catlow-Patterson: Major Projects Manager (Brownfield Housing)

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Paul Cook: Strategic Lead, Education Services

P.cook@bury.gov.uk

Robert Summerfield: Assistant Director of Regeneration

R.summerfield@bury.gov.uk

Executive Director sign off Date: 19/10/2022

Executive Team Meeting Date: _____



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 07 September 2022
Subject:	The Council's Financial Position as at 30 th June 2022	
Report of	Cabinet Member for Finance and Communities	

1. Summary

- 1.1. This report outlines the forecast financial position of the Council at the end of the first quarter of the 2022/23 financial year based on information known on 30th June 2022. The report sets out the position for both revenue and capital and provides an analysis of the variances, both under and overspending.

2. Recommendation(s)

- 2.1. To note the forecast overspend of £1.509m within the revenue budgets at quarter 1 and the need for Directorates to continue to work with their finance managers to maintain tight budgetary control and identify mitigating actions and deliver these to ensure services work within their budgets. It should be noted that this is a forecast only at this stage and is before the utilisation of the £1.5m utilities reserve but also before the full impact of the pay award for 2022/23 is taken into account which could increase costs over and above those budgeted by a further £1.6m
- 2.2. To note the use of the reserves in line with the criteria and one-off departmental priorities.
- 2.3. To note forecast delivery of the 2022/23 MTFS savings as agreed by Council in February 2022.
- 2.4. To note the position on the Dedicated Schools Grant, Collection Fund and the Housing Revenue Account.
- 2.5. To approve an overall increase in the capital programme of £8.020m, as a consequence of new and updated external grant allocations and additional external funding secured by 30th of June.
- 2.6. To note the current position on the capital programme and that a further update will be brought to Cabinet in quarter 2 in respect of forecast spend this financial year.
- 2.7. To approve the extension of the current Insurance contract by 12 months.

3. Reasons for recommendation(s)

- 3.1. To ensure the Council's budgetary targets are achieved.

4. Alternative options considered and rejected

- 4.1. This report is in accordance with the Council's financial procedure regulations.

5. Purpose of this Report

- 5.1. This report outlines the forecast financial position of the Council at the end of 2022/23 based on the information known at the end of the first quarter, 30th June 2022, which is a £1.509m overspend. The report sets out the position for both revenue and capital and provides an analysis of the variances, both under and overspending. It should be noted that this is a forecast only at this stage and is before the utilisation of the £1.5m utilities reserve but also before the full impact of the pay award for 2022/23 is taken into account which could increase costs over and above those budgeted by a further £1.6m.

6. Background

- 6.1. These continue to be unprecedented times for Council budgets with huge volatility and uncertainty caused by Covid, the ongoing rise in cost of living and associated inflationary pressures. This is affecting all Councils. We expect to have ongoing gaps caused by additional services, additional demand on existing services and increases in expenditure due to the rate of inflation being greater than that anticipated when budgets were set in February of this year. It should be noted that these uncertainties are on top of the pre-existing uncertainties in the future of Adult Social Care funding and the Fair Funding Review.
- 6.2. There are a number of overspends identified within this report at quarter one and Directorate Management Teams are working to identify mitigating actions.

7. FINANCIAL OVERVIEW – REVENUE

- 7.1. The forecast out turn position is set out in Table 1 below and shows a forecast overspend at Quarter 1 of £1.509m. Where budgets are over spending work is taking place between Directorates and finance to identify mitigating actions to bring budgets back into line.

Table 1

Directorate	Approved Budget	Forecast	(Under)/Over Spend
	£m	£m	£m
One Commissioning Organisation	80.627	83.167	2.540
Children and Young People	46.390	47.433	1.043
Operations	19.050	20.188	1.138
Corporate Core	17.062	17.247	0.184
Business, Growth and Infrastructure	3.283	3.482	0.199
Housing General Fund	1.288	1.288	0.000
Non-Service Specific	9.784	6.189	(3.595)
TOTAL	177.483	179.028	1.509

8 One Commissioning Organisation – Forecast Overspend £2.540m

Table 2

2022/23 Forecast Revenue Position – as at 30 June 2022			
One Commissioning Organisation	Revised Budget	Forecast	(Under)/Over Spend
	£m	£m	£m
Adult Social Care Operations	8.134	8.114	(0.020)
Care in the Community	42.215	44.051	1.835
Commissioning & Procurement	15.413	16.137	0.725
Public Health	10.935	10.935	0
Departmental Support Services	3.852	3.852	0
Workforce Modernisation	0.078	0.078	0
TOTAL	80.627	83.167	2.540

8.1. The OCO budget is forecast to overspend by £2.540m. The main variances are as follows:

Adult Social Care Operations – (£0.020m) underspend

8.2. The Adult Social Care Operations budget is forecasting a small underspend of (£0.020m) which is the net result of a (£0.086m) salary underspend and a £0.065m overspend within the Carelink service. Following a review of the Neighbourhood Housing Support income contribution towards the Carelink service a decision was taken to remove the contribution with the view that Carelink should

be a self-funded service. A review of the Carelink Service is currently underway with the intention that the £0.065m pressure will be reduced to zero by March 31, 2023.

Care in the Community- £1.835m overspend

- 8.3. The Care in the Community budget is forecast to overspend by £1.835m. In arriving at this forecast outturn it is assumed that a further £1.4m of savings will be delivered before the end of the financial year (i.e., savings not yet achieved but are expected to be achieved by March 31, 2023). Should actual delivery be less than the anticipated £1.4m then the shortfall identified below will increase accordingly.
- 8.4. The overspend is being driven by savings shortfalls within savings' programmes which directly impact the Care in the Community budget and are summarised in the table below.

Table 3

Savings Programme	Target £m	Forecast £m	Shortfall £m
Review of Learning Disability Care Packages	1.200	0.228	0.972
Review of Complex Care Packages	1.500	0.750	0.750
Total	2.700	0.978	1.722

The savings shortfalls are due to a shortage of staff available to undertake the care package reviews. However, staff recruitment is underway and once in post the intention is that the current level of reported savings will improve. Furthermore, existing staff will continue to review care packages throughout the year in order to reduce the £1.7m savings shortfall highlighted above. This is anticipated to be a phasing issue and should be recovered by year end but for prudence is identified here.

Commissioning and Procurement - £0.725m overspend

- 8.5. The Commissioning and Procurement Budget is forecast to overspend by £0.725m. The overspend is due to a forecast £0.725m shortfall regarding the 2022/23 Persona Contract savings target. The OCO & Persona Executive teams have agreed an action plan to enable Persona to deliver their £1.5m savings programme in full through a series of transformation programmes and restructures that are in line with Persona's strategic intent, albeit not in the timeframe originally committed to.
- 8.6. The outcome of the Persona action plan is therefore a reprofiling of the £1.5m 22/23 Persona savings target with the expectation that £0.775m is delivered in 22/23 with the final £0.725m saving being delivered in 2023/24. The OCO Management Team are currently reviewing service areas to determine how the 2022/23 shortfall can be mitigated, currently due to service pressures in other areas of OCO it has not been possible to determine any mitigating actions and so the 2022/23 shortfall of £0.725m is shown as an in year pressure.

9 Children and Young People – Forecast Overspend £1.043m

Table 4

2021/22 Forecast Revenue Position – as at 30 June 2022			
Children and Young People Directorate	Revised Budget	Forecast	(Under)/Over Spend
	£m	£m	£m
Children's Commissioning	1.341	1.341	0.000
Early Help and School Readiness	2.514	2.514	0.000
Education and Skills (non-schools)	17.238	17.438	0.200
Social Care and Safeguarding	25.297	26.140	0.843
TOTAL	46.390	47.433	1.043

9.1. The Children and Young People Directorate is currently forecast to overspend by £1.043m. The main variances are:

Education & Skills - £0.200m overspend

- 9.2. The forecast overspend is due to ongoing pressure and volumes of demand for Home to School/College SEND Transport.
- 9.3. Permanent management of this pressures is through the strategy to reduce demand in conjunction with Project Safety Valve and SEND Transformation priorities by increasing in-borough SEND places. This will have the impact of reducing the requirement for out of borough placements and the associated transport costs which is expected to occur in line with increasing provision and places within Bury, starting in the 2022/23 academic year, i.e. from September 2022.
- 9.4. In year mitigation to this cost pressure will also take place through the review of individual travel schedules and prices, contract negotiation, and from underspends achieved through efficiencies and vacancies where possible from elsewhere within the Education and Skills service areas. This will be closely monitored and reported on throughout the financial year.

Social Care and Safeguarding - £0.843m overspend

- 9.5. The Residential and Independent Fostering Allowances (IFA) placement budget is forecast to overspend by £0.982m based on the current number and complexity of looked after children, the higher cost placements, secure accommodation, and sibling groups. Children's Social Care is currently undergoing transformation which will address capacity and develop practice that will reduce high-cost independent residential and IFA placements

and make significant future savings which will reduce the current full-year forecast overspend stated above once individual placements are reviewed. Therefore, it is imperative that these reviews are undertaken early in the year to bring costs back within budget

- 9.6. At this stage the impact of these reviews is not built into the forecast outturn as the impact on actual placements has not yet been quantified and therefore the resulting financial impact cannot be calculated. This work is ongoing and will be reflected in future budget monitoring reports as the reviews take place.
- 9.7. Offsetting underspends of £0.139m as a result of additional recharges to NHS plus staff vacancies in CAMHS and Victoria Family Support, are, in part, mitigating the above overspend on Residential and IFA placements.

CYP Reserve - £3.5m

- 9.8. Further to the establishment of the CYP £3.5m reserve to support Ofsted recommendations, to transform Children's Social Care practice and caseload capacity, and to support demand pressures prior to implementation of change. The reserve is fully committed for the following priorities in 2022/23 and beyond for the family safeguarding model:

- Family Safeguarding Model
- Children's Services restructure of Social Care, Early Help and Education Services, including
 - Interim Assistant Director of Social Care Practice, agency costs
 - Children's Improvement Manager
 - Head of Strategy and Assurance
 - Senior Management capacity across Social Care teams
 - Enhanced structures, reporting lines, and caseload capacity covering; Fostering, Care and Support Service (CASS), Practice Improvement, Safeguarding Teams, Initial Response Team (IRT), Multi-Agency Safeguarding Hub (MASH), Early Help family support teams, Early Years Development, Education and Skills Quality Standards, School Attendance
 - Out of hours Foster Care on call support
- The restructure also encompasses recruitment and retention developments and other increased staffing establishment costs including, Business Support, HR Support, Priority Car parking, mileage, retention payments, ICT, Telephony
- Victoria Family Centre reception capacity
- Curriculum Language Access Service (CLAS) costs pending full review of the service
- Interim managed social worker packages (from Innovate and Equinox) to address Ofsted caseload capacity requirements, forecast until December

2022 until full implementation and permanent recruitment to the CYP enhanced structure.

10. Operations Directorate – Forecast Overspend £1.138m

Table 5

2022/23 Forecast Revenue Position – as at 30th June 2022			
Operations	Approved Budget	Forecast Out Turn	Forecast (Under)/ Over Spend
	£m	£m	£m
Wellness Operations	2.879	2.879	0.000
Engineers (including Car Parking)	(0.367)	(0.394)	(0.027)
Street Scene	4.847	5.827	0.980
Commercial Services	(0.566)	(0.359)	0.207
Waste, Transport and Stores	6.068	6.180	0.112
Operations Senior Management	4.679	4.679	0.000
Health & Environmental Protection	1.317	1.317	0.000
Corporate Landlord	0.193	0.059	(0.134)
TOTAL	19.050	20.188	1.138

10.1. The Operations Directorate is forecasting an overspend of £1.138m at this time, although it should be noted that this may increase as the full impact of the inflationary increases particularly on energy and fuel become clear. The material variances are as follows:

10.2. **Street Scene - £0.980m overspend:** the overspend is largely due to cost inflation particularly on street lighting of £0.820m and increased inflationary costs of Grounds Maintenance coupled with the costs of necessary temporary staff £0.160m.

10.3. **Commercial Services - £0.207m overspend:** the overspend results from the continued limited utilisation of civic halls totalling £0.307m, this relates to the ongoing non-delivery of the 2021/22 MTFS saving of £0.132m, offset by extra income from increased levels of service in Cleaning (£0.100m).

10.4. **Waste, Transport & Stores - £0.112m overspend:** the overspend is primarily due to increased costs of fuel, £0.266m, offset by savings in staffing and publicity costs (0.154m).

- 10.5. **Corporate Landlord – (£0.134m) underspend:** the underspend primarily arises due to staffing vacancies forecast to be (£0.220m) over vacancy factor requirements offset by budget pressures in Administrative Buildings - rates, cleaning and utilities of £0.086m.
- 10.6. There is further work being undertaken to fully identify the deliverability of all the savings in Table 9 below. At this point there is a risk that not all of the £0.500m will be fully delivered this financial year. However, this will not be known until all the work has been completed and, if necessary, any required mitigations identified. The major risk to full delivery this year is in respect of the £0.300m replacement of leasing costs with the purchase of vehicles within the Transport Service.

11 Corporate Core and Finance Directorate - Overspend £0.184m

Table 6

2022/23 Forecast Revenue Position – as at 30 June 2022			
Forecast	Approved Budget	Forecast	(Under)/ Over Spend
	£ m	£ m	£ m
Corporate Core	10.749	10.813	0.063
Corporate Core Finance	6.313	6.434	0.121
TOTAL	17.062	17.247	0.184

- 11.1. Corporate Core and Finance are forecast to overspend by £0.184m.
- 11.2. The Corporate Core Services overspend position of £0.063m, an element of which is due to a forecast under achievement against income budgets for the Galleries and Museums service.
- 11.3. The Corporate Core Finance overspend position of £0.0121m is due to:
- A forecast overspend on Coroners Court of £0.050m. This is the latest estimate from the lead for Coroners, Rochdale MBC, of the additional costs of potential inquests. Work is ongoing to challenge this assumption and to identify mitigating actions.
 - Pay Services has a forecast overspend of £0.022m in respect of software hosting fees £0.035m offset by various minor underspends of (£0.013m).
 - Procurement has a forecast overspend of £0.049m which is due to underachievement of income from the Yorkshire Purchasing Organisation (YPO) rebate of £0.059m offset by overachieved income for purchasing cards rebate of (£0.010m). There is an ongoing piece of work around

reducing petty cash and moving over to payment cards which may see an increase in the rebate and also a review of all off contract spend which may also increase the rebate from using YPO.

12. Business, Growth and Infrastructure – Overspend £0.199m

Table 7

2022/23 Forecast Revenue Position – as at 30th June 2022			
Business, Growth and Infrastructure Directorate	Approved Budget	Forecast	(Under)/Over Spend
	£m	£m	£m
Economic Regeneration & Capital Growth	1.931	2.130	0.199
Housing Needs & Options	1.356	1.356	0.000
TOTAL	3.283	3.482	0.199

12.1. The forecast overspend of £0.199m is due to non-delivery of the stretch savings target in 2021/22 regarding the staff restructure. The plan to mitigate this pressure is through the additional capitalisation of revenue expenditure. However, areas to capitalise, and appropriate capital funding, are yet to be identified.

13. Housing General Fund – On budget

Table 8

2022/23 Forecast Revenue Position – as at 30th June 2022			
Housing General Fund	Approved Budget	Forecast	(Under)/Over Spend
	£m	£m	£m
Housing General Fund	1.288	1.288	0.000
TOTAL	1.288	1.288	0.000

13.1. The Housing General Fund is forecast to be on budget overall as the budget was realigned as part of the 2022/23 budget setting.

14. Non Service Specific – Underspend £3.595m**Table 9**

2022/23 Forecast Revenue Position – as at 30 June 2022			
Forecast	Approved Budget	Forecast	(Under) / Over spend
	£m	£m	£m
Accumulated Absences	1.362	1.362	0.000
CAR Lease Salary Sacrifice	(0.025)	(0.025)	0.000
Chief Executive	0.381	0.381	0.000
Corporate Management	1.610	1.167	(0.443)
Cost of Borrowing	6.238	2.753	(3.485)
Disaster Expenses	0.011	0.011	0.000
Environment Agency	0.100	0.100	0.000
Pension Service Costs	(20.843)	(20.843)	0.000
GMWDA levy	12.831	12.831	0.000
Passenger Transport Levy	13.650	13.650	0.000
Town of Culture	0.090	0.090	0.000
Townside Fields	(0.058)	(0.058)	0.000
Provisions / Reserves	(5.563)	(5.230)	0.333
TOTAL	9.784	6.189	(3.595)

14.1. Non-Service Specific is currently forecast to underspend by (£3.595m) comprising of:

14.2. Corporate Management: Forecast underspend of (£0.443m) on Corporate Subscriptions and Initiatives budgets, £390k of this budget will be given up recurrently as part of the work to identify savings for future years.

14.3. Cost of Borrowing: Forecast underspend of (£3.485m) comprising an underspend of (£2.500m) on borrowing costs due to rephasing of expenditure in the capital programme. In addition, there is an ongoing budget saving of (£1.000m) from full repayment of inherited long-term debt. This £1.000m has been permanently removed as part of the review of budgets to close the financial gap in 2023/24.

14.4. **Provisions/Reserves:** The transformation programme is currently being shown as a pressure of £0.333m across a number of schemes. Work is ongoing to identify mitigations but the procurement and contract management savings, the value of which is £500k, and has been reprofiled and reduced since the original

programme is still being flagged as a red risk to delivery. The Council is now working with an external delivery partner to support with procurement and will provide a further update at quarter two on the progress in the delivery of these savings.

15. Delivery of the Savings Plan

15.1. Planned savings of £16.096m were approved by Council in February 2022 for the 2022/23 financial year, £4.860m newly approved and £11.216m confirmed from February 2021 Council. In addition there were £2.861m of 2021/22 savings which were undelivered and therefore carried over to the current financial year. The total savings requirement for the current financial year therefore being £18.957m, split across Council departments as shown in the table below.

Table 10

2022/23 Total Savings Delivery	£m
Council wide	6.565
Business, Growth & Infrastructure	0.200
Corporate Core	0.250
Children & Young People	0.737
One Commissioning Organisation	9.645
Operations Department	1.560
TOTAL	18.957

15.2. Forecast delivery against the total savings target of £18.957m is £15.466m (82%) as detailed on a scheme by scheme basis in Table 9 below

Table 11

2022/23 MTFS SAVINGS AS AGREED BY COUNCIL					
Year Approved	Dept	Proposal Description	Saving £m	Forecast £m	Variance £m
Feb 2022	ALL	Vacancy Factor	1.200	1.200	0.000
Feb 2022	ALL	Unpaid leave - budget realignment	0.100	0.100	0.000
Feb 2021	ALL	Supplier Review of Contracts	0.265	0.265	0.000
Feb 2021	ALL	Transformation Agenda	3.500	3.341	-0.159
	ALL	Sub-Total	5.065	4.906	-0.159
Feb 2022	CORE	Adult Learning	0.050	0.050	0.000
Feb 2022	CORE	Corporate Security & Call Out Services	0.200	0.200	0.000
	CORE	Sub-Total	0.250	0.250	0.000
Feb 2022	CYP	Childrens Personal Budgets	0.150	0.150	0.000
Feb 2022	CYP	Childrens Short Breaks	0.150	0.150	0.000
Feb 2022	CYP	Childrens External Placements	0.200	0.200	0.000
Feb 2022	CYP	Further Education early retirements/pensions	0.100	0.100	0.000
Feb 2022	CYP	Childrens Early Help	0.100	0.100	0.000
Feb 2021	CYP	Removal of budget for vacant posts and reduced travel and expense costs	-0.309	-0.309	0.000
Feb 2021	CYP	Contract Reviews for services provided by external agencies	0.100	0.100	0.000
Feb 2021	CYP	Reduced transport costs as a result of fewer out of borough placements	0.120	0.120	0.000
	CYP	Sub-Total	0.611	0.611	0.000
Feb 2021	OCO	Review of Care Packages	2.055	1.083	-0.972
Feb 2021	OCO	Innovative Commissioning (Persona & Transitions Planning)	1.600	0.875	-0.725
Feb 2021	OCO	Adult Social Care Personalisation and Transformation	1.000	1.000	0.000
Feb 2021	OCO	Development of Assistive Technology	0.500	0.121	-0.379
Feb 2021	OCO	Improved Housing Options for People with Disabilities	0.050	0.050	0.000
Feb 2021	OCO	Effective and Efficient Commissioning	1.950	1.200	-0.750
Feb 2022	OCO	Release half demographic growth	0.500	0.500	0.000
Feb 2022	OCO	CCG recurrent pick up of IMC and rapid response	1.224	1.224	0.000
	OCO	Sub-Total	8.879	6.053	-2.826
Feb 2022	OPS	Trade Waste Income	0.020	0.020	0.000
Feb 2022	OPS	Pest control increased income and efficiencies	0.017	0.017	0.000
Feb 2022	OPS	Public protection - Income Generation and Budget Rationalisation	0.020	0.020	0.000
Feb 2022	OPS	Traded Services Review – Caretaking and Cleaning	0.084	0.084	0.000
Feb 2022	OPS	Traded Services Review – Schools Catering	0.100	0.100	0.000
Feb 2022	OPS	Change provision of waste caddy liners	0.050	0.050	0.000
Feb 2022	OPS	Leisure & Wellness Programmes - increased efficiency	0.212	0.212	0.000
Feb 2022	OPS	Increase Recycling and Minimise Waste	0.050	0.050	0.000
Feb 2022	OPS	Review of Persona Transport Services	0.100	0.100	0.000
Feb 2022	OPS	Removal of Vacancies, job redesign	0.143	0.143	0.000
Feb 2022	OPS	Modernise Utility Billing	0.050	0.050	0.000
Feb 2022	OPS	Merge Equipment Stores	0.040	0.040	0.000
Feb 2021	OPS	Review of Highway Fees	0.070	0.070	0.000
Feb 2021	OPS	Remove vehicle and equipment leasing costs to reflect approved borrowing through the capital programme	0.300	0.300	0.000
Feb 2021	OPS	Review of Waste Services and Fleet Rationalisation	0.025	0.025	0.000
Feb 2021	OPS	Street Light Dimming	0.010	0.010	0.000
	OPS	Sub-Total	1.291	1.291	0.000
		TOTAL DELIVERY AGAINST 2022/23 MTFS SAVINGS	16.096	13.111	-2.985

PREVIOUS YEARS MTFS SAVINGS CARRIED FORWARD AS NOT DELIVERED IN 2021/22					
Prior Yr Saving	Dept	Proposal Description	Saving £m	Forecast £m	Variance £m
Prev Year	ALL	Transformation	1.500	1.326	-0.174
	ALL	Sub-Total	1.500	1.326	-0.174
Prev Year	BGI	Restructure Stretch Savings Target	0.200	0.000	-0.200
	BGI	Sub-Total	0.200	0.000	-0.200
Prev Year	CYP	Efficiencies & Transformation	0.126	0.126	0.000
	CYP	Sub-Total	0.126	0.126	0.000
Prev Year	OCO	MH Care Packages	0.011	0.011	0.000
Prev Year	OCO	Low-Cost Care Packages	0.352	0.352	0.000
Prev Year	OCO	Persona Contract	0.203	0.203	0.000
Prev Year	OCO	Care at Home Pricing Structure	0.200	0.200	0.000
	OCO	Sub-Total	0.766	0.766	0.000
Prev Year	OPS	Closure of Civic Venues	0.132	0.000	-0.132
Prev Year	OPS	Review of Waste Services and Fleet Rationalisation	0.137	0.137	0.000
	OPS	Sub-Total	0.269	0.137	-0.132
		TOTAL DELIVERY AGAINST PREVIOUS YEARS UNDELIVERED MTFS SAVINGS	2.861	2.355	-0.506

16. Council Reserves

16.1. At the end of 2021/22 the council's total usable reserves, excluding Schools, were £126.115m. It should be noted that a significant proportion of these are earmarked.

16.2. At Quarter 1 a number of transfers to and from reserves are expected to take place during the financial year, some of which were approved through the budget setting process and others have been identified through the financial outturn process.

16.3. Forecast transfers to reserves total £4.809m and consist of:

- £1.129m to General Fund
- £2.997m smoothing reserve
- £0.683m social care reform
- £1.388m business rates risk

16.4. Forecast transfers from reserves total £21.055m and consist of:

- £14.355m supporting the 2022/23 revenue budget
- £2m relating to the Children's reserve supporting Ofsted related improvements as described earlier in this report, £1.5m is expected to be carried forward to fund the last 6 months of the first year and the 2nd year of the family safeguarding model
- £1.450m expected use of the Transformation Reserve
- £0.350m of COMF funding carried forward from 2021/22
- £1.5m utilities reserve to support in year pressures
- £1.4m contribution to the pay award which is currently being negotiated and expected to be significantly above the 2% originally budgeted. Early indications are that the costs of this could be as high as £3m in excess of the currently budgeted £2.6m. Thereby resulting in a pressure of £1.6m over and above the budget and the reserve

Table 12

Forecast of Council Reserves at 31 March 2023				
	31/03/22	In	Out	31/03/23
General Reserves	23.816	1.129	(8.604)	16.341
Directorate Risk Reserves	9.257		(3.500)	5.757
Volatility and Fiscal Risk	37.675	2.997	(5.751)	34.921
Total Management of Risk Reserves	70.748	4.126	(17.855)	57.019
COVID-19 Related Grants	4.691			4.691
Corporate Priorities	11.395		(1.400)	9.995
Transformation Reserve	7.794		(1.450)	6.344
External Funding/Grants	19.427	0.683	(0.350)	19.760
Other Earmarked Reserves	12.080			12.080
Total Earmarked Reserves	55.387	0.683	(3.200)	52.870
Total Council Reserves (excluding Schools)	126.115	4.809	(21.055)	109.869

17. Other Budgets

Schools

17.1. The council's expenditure on schools is funded primarily by the Dedicated Schools Grant (DSG). The DSG is ringfenced and can only be spent on schools related activity as set out in the Schools and Early Years Finance (England) Regulations 2020. The Schools Budget includes funding for a range of educational and support services provided on an authority wide basis as well as Individual Schools Budget (ISB). The Schools' Forum recommends the allocation of funding to schools and academies through the application of the funding formula.

17.2. The DSG has 4 main blocks:

Block	2022/23 Budget
	£m
Schools	143.041
High Needs	39.427
Early Years	13.486
Central Support Services	0.991
TOTAL	196.945

17.3. In addition to the DSG, schools and academies also receive external funding from grants including:

Estimated External Funding 2022/23	£m
DSG Additional Supplementary Grant	5.683
Pupil Premium Grant	9.327
Universal Infant Free School Meals Grant	2.206
Primary PE and Sport	1.045
Covid-19 Recovery, Workforce, Vaccination	2.149
Devolved Formula Capital	0.805
High Needs Capital	3.781
TOTAL	24.996

- 17.4. From 2019/20 the Department for Education (DfE) required all councils to complete a recovery plan should their overspend on the DSG exceed 1%. Given the scale of Bury's DSG deficit, which accumulated to over £27m by the end of 2020/21, the Council has entered into a formal agreement 'Safety Valve' with the DfE.
- 17.5. The Safety Valve agreement sets out a 5 year timeline to ensure SEND transformation and DSG deficit recovery priorities can be sustained.
- 17.6. The Safety Valve Agreement and Monitoring requirements outline the commitment required by Bury to address the deficit through SEND transformation and the review of all associated financial aspects.
- 17.7. The Safety Valve agreement has enabled Bury to secure an additional £20m DSG. This additional DSG is profiled to be allocated across 5 years in accordance with the Safety Valve agreement.
- 17.8. The Safety Valve development with the DfE has also provided a further £3.781m additional High Needs Capital funding to Bury. This is being targeted as a priority to develop, enhance and increase in-borough specialist provision and places across Bury's Special Schools and Mainstream settings.
- 17.9. The deficit recovery remains subject to ongoing increased in-year cost pressures for high-cost out of borough SEND placements, in-year increased capacity and associated high-cost banded placements at Bury's Maintained Special Schools, plus in-year top-up funding for increased volumes of EHCPs in Bury's Mainstream Schools and Academies.
- 17.10. The following highlights the revised recovery profile updated as at July 2022 and indicative forecast position on the DSG deficit, indicating in brackets the additional

DSG provided in each year:

• DSG Deficit as at end 2019/20	£20.067m
• DSG Deficit as at end 2020/21	£21.407m (£6.000m)
• DSG Deficit as at end 2021/22	£21.473m (£4.724m)
• DSG Deficit forecast as at end 2022/23	£18.026m (£4.000m)
• DSG Deficit forecast as at end 2023/24	£11.249m (£3.000m)
• DSG Deficit forecast as at end 2024/25	£0.207m (£3.000m)
• DSG Surplus forecast as at end 2025/26	£0.532m

17.11. The pressures referred to are ongoing during 2022/23 and mitigating actions are being developed as part of the Safety Valve programme priorities. The mitigations include the transformation of Mainstream EHCP top-up funding, Special School banding levels, Inclusion Partnership funding, and review of all High Needs Block funding contributions to non-statutory support services. The delivery of these mitigations will result in the recovery profile at 15.10 being regularly updated and submitted to the DfE for their assurance.

17.12. The DfE have recently revised the funding increases to be forecast into 2023/24 and 2024/25 recovery years which presented a risk to recovering the full deficit by the end of 2024/25, in accordance with the original agreement. Further discussions with the DfE are taking place to reach agreement on how this will be managed.

17.13. The full Safety Valve report and delivery plan is subject to separate updates to Scrutiny, Cabinet and Council

17.14. Guidance on the treatment of DSG deficit reserves is included in the statutory DSG Conditions of Grant which states that the LA must co-operate with the DfE in accordance with the provisions specified. These Conditions include, but are not limited to, communication, information sharing, meeting DfE officials as and when requested, deficit recovery, LA and external audit reporting requirements, and repayment of the DSG if the LA does not comply with DfE and external audit requirements.

18. COLLECTION FUND

18.1. The increasing prominence of council tax and business rates in helping fund council services means that the collection fund is monitored on an ongoing basis. The current forecast position is an in-year surplus of £4.279m with a residual deficit brought forward from 2021/22 of £2.324m. (This is the difference between the statutory estimated deficit as at 15th January 22 and the outturn position) This is then adjusted for the year 3 mandatory spreading adjustment for the 2020/21 deficit of £1.068m bringing the overall forecast net surplus to £0.887m. The council's share of the surplus is £0.473m and the Greater Manchester Combined Authority's share is a surplus of £0.414m (for police and fire and rescue services).

18.2. The proportionate shares for Business Rates and Council Tax mean that Greater Manchester Combined Authority have a 1% share of the Business Rates deficit and a 16% share of the Council Tax surplus, whereas the council have a 99% share of the Business Rates deficit and a 84% share of the Council Tax surplus. In this instance both the council and GMCA have a net surplus.

18.3. Due to the impact on the Council's ability to collect both Council Tax and Business Rates, an important change to Collection Fund accounting was introduced for 2020/21, which (with the exception of the £24.899m Government grant funded Business Rate reliefs) mandated the smoothing of the impact of COVID related deficits over three financial years, thus reducing the impact on the revenue budget. The Council's 2022/23 budget has been prepared using this new facility and the year 3 impact can be seen in the table below.

Table 13

2022/23 Collection Fund Forecast Position as at 30 June 22			
	Council Tax	Business Rates	Total
	£m	£m	£m
Balance Brought Forward surplus (+) / deficit (-)	4.902	(14.348)	(9.446)
Prior Year estimated surplus / deficit repaid in year	(5.364)	12.486	7.123
Estimated (Surplus)/Deficit for the year	3.696	0.583	4.279
Year 3 of the spreading adjustment for 2020/21 deficit	(0.526)	(0.542)	(1.068)
Balance Carried Forward surplus (+) / deficit (-)	2.708	(1.821)	0.887
<i>Distributed:</i>			
Bury Council	(2.275)	1.803	(0.473)
GMCA – Police and Crime Commissioner	(0.298)	0.000	(0.298)
GMCA – Mayoral / Fire and Rescue Service	(0.135)	0.018	(0.116)
Total 2022/23	(2.708)	1.821	(0.887)

19. HOUSING REVENUE ACCOUNT

Table 14

2022/23 Forecast Revenue Out Turn Position - as at 30th June 2022			
Housing Revenue Account	Approved Budget	Actual Outturn	Forecast (Under)/Over Spend
	£m	£m	£m
Income			
Dwelling Rents	(31.568)	(31.558)	0.010
Non-Dwelling Rents	(0.203)	(0.203)	0.000
Other Charges	(1.048)	(1.048)	0.000
Total Income	(32.819)	(32.809)	0.010
Expenditure			
Repairs and Maintenance	6.902	6.902	0.000
General Management	7.380	7.380	0.000
Special Services	1.401	1.401	0.000
Rents, Rates and Other Charges	0.036	0.036	0.000
Increase in Bad Debts Provision	0.510	0.510	0.000
Capital Charge	4.713	4.713	0.000
Depreciation	7.472	7.472	0.000
Debt Management Expenses	0.045	0.045	0.000
Contribution to/(from) reserves	(3.749)	(3.749)	0.000
Total Expenditure	24.710	24.710	0.000
Net Cost of Services	(8.109)	(8.099)	0.010
Interest receivable	(0.018)	(0.018)	0.000
Principal Repayments	0.000	0.000	0.000
Revenue Contributions to Capital	7.910	10.091	2.181
Sub Total	7.892	10.073	2.181
Operating (Surplus)/Deficit	(0.217)	1.974	2.191

19.1. In reviewing the in-year financial position, it is useful to consider some of the other aspects of performance regarding the Housing Revenue Account. These are still to some degree being affected by the financial impacts resulting from the

pandemic; this makes forecasting with any certainty very difficult.

19.2. The most significant variance is the Revenue Contribution to Capital. The 2022/23 budgeted contribution was £7.910m, against a forecast Outturn of £10.091m. The forecast increase of £2.199m to £10.091m, is also shown in 20.1 below, which sets out changes to capital expenditure and related funding.

19.3. The £2.191m increase is a further draw on HRA balances on top of the budgeted contribution to reserves of £3.749m. The total draw on HRA reserves is forecast to be £5.940m, against an opening balance of £9.842m. This means that forecast HRA reserves as at 31 March 2022 are £3.902m.

19.4. The £2.191m forecast increased draw on HRA reserves, is in the context of a £3.098m saving in the reserve requirement in the previous financial year (see report Financial Outturn Position 2021-22).

19.5. Other variances against budget are not significant at this stage but rental income has been slightly reduced due to an increase in voids. This variance and other updates are set out below:

Voids The rent loss due to voids for April to June was on average 1.21% which is slightly worse than the 1% void target level set in the original budget. If this performance continues, there will be a reduction in rental income of £0.010m (see shortfall in Dwelling rent above) over the original budget. Six Town Housing continue to review the voids processes and the various factors affecting demand.

Arrears The rent arrears at the end of June totalled £1.926m. Of the total arrears £0.569m are in respect of former tenants' arrears and £1.357m are in relation to current tenants' arrears. Of the current tenant arrears £1.156m is in relation to cases where either underoccupancy charges apply or the tenants are in receipt of Universal Credit rather than housing benefit.

Bad Debts The Council is required to make a provision for potential bad debts. The contribution for the year is calculated with reference to the type of arrears, the amount outstanding on each individual case and the balance remaining in the provision following the write off of debts.

The forecast increase in the required contribution to the Bad Debt Provision is based on an assessment of the arrears at the end of December and the potential change in arrears for the remainder of this financial year. This is very much an estimate based on current trends and expectations and is closely monitored.

Right to Buy Sales The forecast for 2022/23 is 46. There have been 14 sales in the period April to June which is 5 more than at this point last year. The number of applications currently stands at 35.

20. CAPITAL PROGRAMME

20.1. The Council approved a capital budget for 2022/23 of £142.486m. The table below summarises the current position at quarter1, 30th June 2022.

Table 15

	Approved Budget 2022/23	Proposed adjustment at Month3	Revised Budget 2022/23	Proposed re-phasing to 2023/24/25 provisional estimate	Forecast For year provisional estimate	Variance under / (overspend)
	£m	£m	£m	£m	£m	£m
Capital Programme 2022/23	142.486	8.020	150.506	(71.700)	78.806	0.000
Funded By:						
External Funding and Contributions	(68.179)	(4.245)	(72.424)	39.833	(32.591)	0.000
Use of Capital Receipts	(0.250)	(0.155)	(0.405)	0.223	(0.182)	0.000
Prudential Borrowing	(58.832)	0.103	(58.730)	30.844	(27.886)	0.000
General Fund and Reserves	(0.724)	(0.732)	(1.456)	0.800	(0.656)	0.000
Housing Revenue Account	(7.100)	(2.991)	(10.091)	0.000	(10.091)	0.000
Major Repairs Reserve	(7.400)		(7.400)	0.000	(7.400)	0.000
TOTAL	(142.486)	(8.020)	(150.506)	71.700	(78.806)	0.000

20.2. The total revised programme proposes a net increase of £8.020m to the 2022-23 capital programme, from £142.486m to £150.506m. This increase comprises £9.263m of additional grant funding, £4.383m of slippage brought forward from 2021-22, offset by a £4.5m reduction in borrowing and other £1.127m as a consequence of prior year commitments and adjustments to schemes already approved by Cabinet during 2021/22.

20.3. The amount of £9.263m comprises announcements for additional external funding available to the Council since April, including updates on estimated announcements made by Government Departments at an earlier date.

- **New Grants notified during Quarter1**

Grant	£m
Devolved Formula Capital (Schools)	0.308
Schools Condition Allocation	2.059
High Needs Provision Allocation	1.706
Mayor's Challenge Fund	4.108
City Region Sustainable Transport	0.900
Bury Athletic Track	0.182
Total grant notified	9.263

20.4. Less a reduction in the original approved programme for Sport and Leisure and ICT schemes, due to re-phasing of budgets already accounted for in the programme.

- **Prudential Borrowing in excess of proposed investment need**

Borrowing	£m
Sport And Leisure	(2.000)
ICT Projects	(2.500)
Total reduction in borrowing need	(4.500)

20.5. There have also been changes to the funding for specific capital projects since the original programme was approved. It is proposed to update the relevant project budgets for these changes. They are itemised in the table below.

- **Other grants and contributions received/reduced during Quarter4 or approved in 2021/22 for 2022/23, to include in the programme**

Grant / external funding /Council resources	£m
Parks Strategy 2022/2023	0.050
Play Area Strategy	0.045
Bury Athletics Track	0.100
Sports (3G Pitch Radcliffe Match funding)	0.100
Cycling and Walking Routes / Mayors Challenge Fund	1.148
Town Hall H&S New Works	0.040
Springwater Park Land Slip	0.050
Empty Property Strategy	0.250
Public Sector Decarbonisation	(2.910)
Total other adjustments at Qtr1	(1.127)

- The 2021/22 Outturn slippage of £4.384m for the 2021/22 year end, if included, would bring the total of 2022/23 programme adjustments to £8.020m. A recommendation to approve a carry forward of £4.384m is included in the 2021/22 Outturn Report (The Council's Financial Position – 2021/22 Outturn, 7th September 2022).

20.6. Cabinet is recommended to approve the net change of £8.020m as an increase to the programme approved in February at the Council Budget setting meeting as a consequence of external funding and the rephasing of the capital programme and note the reduced requirement for Prudential Borrowing as a consequence.

Capital Gateway – future planning

20.7. During 2022/23 the Council will implement a reinvigorated capital gateway process that will undertake a scheme-by-scheme review. This will ensure re-phasing of schemes into the next and future financial years allowing for structured, prioritised delivery of schemes and ensuring optimal financial planning of Council's resources. The Capital Gateway processes will be refreshed during 2022/23 and for future years to enable reviews of all new and existing schemes against corporate priorities and the Council's capital strategy. The capital gateway process aims to embed effective monitoring and reporting arrangements whilst ensuring that:

- schemes are prioritised and presented to members for consideration at appropriate times during the year
 - schemes are a strategic fit with corporate priorities
 - adequate resources are identified at the start of the process to ensure sufficient capacity is available to deliver the projects within anticipated timescales
 - effective monitoring is carried out so that any slippage or delays can be considered and reported
 - effective project management practices are embedded for all projects

20.8. To allow for delivery planning of schemes in the programme, the Funding table will be further updated at quarter 2 with an estimated amount of re-phasing into future years for projects that are not likely to start during this year or may span a number of financial years and therefore need the budgets phasing to reflect anticipated delivery timeframes where they don't currently.

20.9. If slippage follows a similar pattern at year end to that of previous years and based on spend precedents, a potential slippage of around 55% of the approved current programme may occur, which equates to an approximate amount of £71.7m. This figure excludes an expected full spend on the Housing Public Sector programme of £17.5m and ICT corporate schemes of £2.554m.

20.10. Work to phase spend appropriately, thus reducing the level of slippage will be ongoing in the year. Cabinet will be updated within the quarter 2 finance report on the likely values

Future funding opportunities for investment in Bury's assets:

20.11. As part of 'The Streets for All allocation', the Council will receive a share of the £1.07bn City Region Sustainable Transport Scheme (CRSTS) allocated to Greater Manchester, announced to be a total of £15.4m. This allocation will be awarded subject to Strategic Outline Business Cases (SOBC) for each of the three town centres that will benefit from the CRSTS investment:

- Radcliffe Town Centre £9.0m
- Bury Town Centre £4.1m
- Ramsbottom Town Centre £2.3m

Expenditure and forecast 2022/23

20.12. As at 30th June 2022, capital expenditure totalled £6.647m, net of previous year accruals. Expenditure is lower than anticipated and given the size of the programme, however it is expected to increase during the remainder of the year as cashflow is firmed up and purchase orders for works are placed.

Table 16

Capital Theme	Proposed Revised Budget	Forecast estimate (based on previous year outturn)	Expenditure to June
Capital Scheme	2022/23	2022/23	2022/23
	£m	£m	£m
Regeneration	63.409	28.500	1.464
Place Shaping / Growth	7.074	3.200	0.160
Sport and Leisure	4.863	2.200	0.432
Operational Fleet	4.493	2.000	0.054
ICT	2.754	2.754	1.236
Highways	18.782	8.400	1.151
Children and Young People	19.872	8.900	0.418
Estate Management - Investment Estate:	0.198	0.198	0.000
Estate Management - Corporate Landlord:	5.738	2.600	0.254
Communities and Wellbeing	2.490	1.100	0.000
Housing	18.584	17.954	0.878
Climate Change	2.248	1.000	0.600
Total Capital Programme	150.506	78.806	6.647

20.13. The forecast at Qtr1 is provisional and based on previous year Outturn trends.

20.14. At the time of this report, there is a provisional assumption for an estimated 45% of the programme (approximately £78.800m) forecast, to be spent by the end of the financial year against a budget of £150.506m. This will mean an underspend of £71.700m against current budget, figure that will be further refined during the year through re-phasing.

Insurance Contract

20.15. The current Insurance contract is due to expire on 31st March 2023 and Cabinet is

recommended to extend this by 12 months to 31st March 2024 and this has been confirmed by Gallaghers, our current brokers, as acceptable should we wish to proceed.

20.16. Due to the Ofsted report, our Liability Insurers are concerned regarding a significant rise in premiums. Extending the tender by a year would give the service time to implement new procedures and prove to insurers that changes have been made and that we are now at a lower level of Risk. The current Head of Insurance also retires on 1st September 2022 and the service is in the process of implementing the finance restructure which incorporates a Head of Fraud, Audit, Insurance and Risk but this person will not be in post in time to undertake this work should we wish to repocure for a new contract from the 1st April 2023.

20.17. Procurement & Legal have been contacted and they have advised that the contract could be extended for a further twelve months under the following criteria as specified in Regulation 72 1 c of the Public Contract Regulations 2015.

21.NEXT STEPS AND CONCLUSION

21.1. The financial position requires ongoing scrutiny and careful monitoring in order for the Council to recover its financial position and achieve both a balanced budget at year-end and its medium-term financial strategy.

21.2. Work is required during the remainder of the financial year to ensure the capital programme supports the ambitious regeneration plans Bury has and to work with officers to ensure capital budgets support both the strategic needs of the Borough and the requirement for capital schemes to be delivered within budget.

Report Author and Contact Details:

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Links with the Corporate Priorities:

A strong financially sustainable Council is essential to the delivery of the Let's do it Strategy.

Equality Impact and Considerations:

Under section 149 of the Equality Act 2010, the 'general duty' on public authorities is set out as follows:

A public authority must, in the exercise of its functions, have due regard to the need to -

- (a) eliminate discrimination, harassment, victimisation and any other conduct that is prohibited by or under this Act;*

(b) *advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it;*

(c) *foster good relations between persons who share a relevant protected characteristic and persons who do not share it.*

The public sector equality duty (specific duty) requires us to consider how we can positively contribute to the advancement of equality and good relations, and demonstrate that we are paying ‘due regard’ in our decision making in the design of policies and in the delivery of services.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The council is unable to manage its finances.	The content of the report supports the Council in managing the overall financial risks and financial planning for the Council.
Some of the capital schemes that are forecast to spend by year end may slip into the next financial year, due to the pace of planning stages, design and agreements that involve external parties	Work is undertaken to ensure where possible that projects are delivered on time with externally funded, conditions attached schemes being prioritised.
Rising interest rates impact upon the cost of borrowing and therefore increased costs of the capital programme	Whilst this was always considered an external risk (a contingency to mitigate it was historically built into the estimates for financing costs in the Council's financing strategy), the current rapid rise of inflation and interest rates will require some careful planning of the intent to borrow, to support the Council's capital programme.

Legal Implications:

The extension to the insurance contract is a Cabinet decision as the value exceeds 1m. There is no extension provision within the Contract however the extension is permitted as a modification permitted under Regulation 72 (1) (c) of the Public Contracts Regulations 2015 which relates to unforeseen circumstances.

Financial Implications:

The financial implications are set out in this report

Background papers:

None.

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning



Classification: Open	Decision Type: Key
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Report to:	Cabinet	Date: 19 October 2022
Subject:	Medium Term Financial Strategy Refresh	
Report of	Cabinet Member for Finance and Communities	

Summary

The Bury Council Medium Term Financial Strategy (MTFS) runs to 2025/26 and will be refreshed as part of the annual budget setting process in February 2023.

A mid-year review of the MTFS has been undertaken as a matter of good practice and in the context of the unprecedented inflationary and demand pressures being experienced so far this year. The review has indicated a provisional budget deficit of £29.204m in 2023/24; a further gap of £3.475m in 2024/25 and a further £5.866m in 2025/26.

This report provides the detail of the updated MTFS forecast and sets out a range of options to address this deficit, as a basis for consultation with affected stakeholders.

Recommendation(s)

The Cabinet is asked to:

1. Approve the updated medium term financial strategy and the assumptions regarding resources and spending requirements, as of October 2022. It should be noted that this information does not yet include the national Local Government settlement which is expected in December 2022.
2. Note the projected budget gap of £29.204m in 2023/24 a further gap of £3.475m in 2024/25 and a further £5.866m in 2025/26.
3. Approve the commencement of public consultation in relation to the proposals as set out in Section 5 and Appendix 3 of this report.
4. To note that staff will be consulted on the proposals as set out in this report and service specific consultations will be phased as detailed proposals are developed.
5. Note that there is still a remaining gap in the 2023/24 budget and that further work will continue to close this, before the final budget proposals are made to Members in February 2023.

Reasons for recommendation(s)

It is a legal requirement that all local authorities set a balanced budget before the start of each financial year. It is also a requirement to consult on service

closures and changes and, in order to do this in advance of decisions being made, consideration needs to be given as to which of the savings proposals this affects.

Early and iterative planning is essential for the Council to proactively respond to the financial challenge in future years.

Alternative options considered and rejected

Officers and Members have undertaken significant work over the past six months to review all areas of potential savings and bring forward proposals which, insofar as is possible align with the Council's strategic objectives as described in the LET'S Do It! Strategy.

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1. Background

The Medium-Term Financial Strategy (MTFS) is the Council's multi-year financial plan and control framework to align resources to the spending priorities set out in the corporate plan and Borough vision: LET'S Do It!

In preparation for setting the 2023/24 budget the MTFS has been updated to reflect resource forecasts and funding announcements. The update this year is forecasting unprecedented increases in spending due to inflation, which is presenting sharp rises in the majority of the Council's cost base and increased demand for adults and children's services.

The outcome of this review is a projected budget gap of £29.204m in 2023/24; a further gap of £3.475m in 2024/25 and a further £5.866m in 2025/26. – These savings follow on from budget savings and reductions across Council functions totaling £114m since 2010/11, of which £46m have been delivered since 2017/18.

These projected financial gaps and budgetary pressures are not unique to Bury Council. This is the landscape which is common across the Greater Manchester authorities and England, with many authorities reporting additional pressures over the last six months.

2. Medium-Term Financial Strategy (MTFS) refresh

The MTFS was last updated in October 2021 and reconfirmed when the Council set its budget for the current year on 23rd February 2022. Since that review there have been unprecedented changes in the financial context that the Council has to operate within. This refresh has had to respond to a sudden and significant worsening of the Council's financial position caused by external changes. These are as follows:

- Sharp increases in energy costs following the war in Ukraine
- Increases in costs caused by the disruption of supply chains during Covid
- Inflation in the UK which is now much higher than previously predicted, currently CPI is at a 40 year high of 9.9% in August 2022 compared to 3.2% in August 2021 and 6.2% in February 2022.
- The increased costs of energy and general inflation are causing a cost of living crisis affecting Bury people. The Council is working with community and voluntary organisations to support people through the crisis but it is also creating additional costs for social care services
- Higher inflation is having an impact on the nationally determined pay awards that the Council could not have predicted last February. When assessing the impact of the current 2022/23 proposed pay offer and the potential offer for 2023/24 this adds £6.9m to the pay bill over the £2.9m that was previously budgeted

- The increase in the Real Living Wage to £10.90 per hour, essential to support the lowest paid and particularly those in the care sector, will add a further £3.2m to the budget over and above the previously budgeted £3.4m
- National shortages of labour are also increasing workforce costs, particularly within children's services
- UK interest rates are now at their highest level for 14 years. This will create conditions for higher costs for Council borrowing
- Significant work had been undertaken in previous years to build a financially resilient Council and whilst the previous MTFS identified a £14m gap for 2023/24 this position has significantly worsened due to pay awards of £6.9m above those previously budgeted, the real living wage rising significantly, £3.2m above the £3.4m previously budgeted and the rising costs of utilities which are all outside of the Councils control

When the Council set its budget for 2019/20 it agreed to end a reliance on reserves and to move to a position of contributing to reserves in future years. This was achieved in 2020/21 when the Council added £10m to general reserves and created a further £5.8m Transformation Reserve from a review of the Collection Fund. Also, in 2020 the reserves were aligned to strategic risks and the governance and controls over the use of reserves were improved. This policy worked well and meant the Council was able to set a budget without reliance on reserves. However, the 2021/22 budget had to respond to the extreme financial challenges of the Covid 19 pandemic and planned use of reserves formed part of the MTFS in both 2020/21 and a further £14m in 2022/23.

Forward financial planning remains difficult. The volatility in the Council's financial position caused by Covid has now been replaced by greater uncertainty. The changes in government financial policy announced on 23rd September have brought new and profound uncertainties to the financial outlook.

In the absence of a comprehensive spending review it had been assumed that government departments would be funded at the levels set last year. The gap of £29m is based on an assumption of no further funding from the Government in the financial settlement i.e. a flat cash settlement in line with the previous years values. However, increases in government borrowing to fund permanent tax cuts may lead to cuts in public spending. If the NHS and defence are protected there is the prospect of returning to the deep spending cuts to local government seen in the 2010 to 2019 period.

More will be known after the next fiscal event on 31st October however the full implications for the Council's budget are unlikely to be clear until the Local Government Settlement expected in late December 2022. It is therefore important to note that whilst this report includes proposals for consultation on how the Council intends to close the new budget gap in 2023/2024 and the following two years, the options do not yet completely close the gap and that gap may widen further because of government decisions.

In summary the outcome of the MTFS refresh has:

- Determined the likely levels of resources available over the medium term including:
 - Increased Council Tax and business rates
 - Removal of the increase in national insurance

Updated the expenditure requirements significantly, in terms of:

- Pay award and real living wage assumptions
- Utilities inflationary pressures - £1m has been included as work is ongoing to mitigate the rising costs through building closures and disposals, decarbonisation measures but this is a risk as the current price cap is only until March 2023
- Increased costs of the transport and waste disposal levies
- Impact of the children's services restructure approved by Cabinet in July 2022

The refresh does not take account of the national funding settlement which will not be available before December. Several further variables are also still unknown and will continue to be kept under review before the final budget is set in February 2023. These include:

- Continuation of in year 2022/23 pressures in children's social care
- Utilities costs or inflationary pressures in significant excess of current estimates, this will require careful and ongoing review and scrutiny
- The national economic position is very challenging which could result in increased pressure on public services and reduced collection rates for Council Tax and Business Rates
- There are several Government schemes which are due to end, including the business rates retention scheme under GM Devolution, which if, and when withdrawn will have a negative impact on the Council's resources
- Long term utility inflation costs, beyond the recent cap rates for the next 6 months

The MTFS is also predicated on a number of funding assumptions at this time. These will be refined and confirmed before the final budget is set but include:

- Assumed Council tax increase of 1.99% which is below the referendum level of 2%
- No continuation of the adult social care precept as 2022/23 was the last year
- Continuation of £2.7m of the non-recurrent grants received as part of the one-year funding settlement in December 2021 but only for a further year
- That the business rates retention scheme is retained for at least 2023/24
- No further increases to the local government settlement based upon recent Government announcements to plan on the assumption of a flat cash settlement

The summary of the forecast resource position and deficit is below.

Spending Requirement		2023/24	2024/25	2025/26
		£m	£m	£m
Total Revenue Resource				
Council Tax		(100.158)	(103.121)	(105.704)
Business Rates		(59.396)	(61.562)	(61.771)
Government Grants		(16.524)	(16.524)	(16.524)
Revenue Resource Forecast		(176.078)	(181.207)	(183.999)
Total Spending Need brought forward from 2022/23 budget setting		190.343	197.257	198.291
Original Budget Gap		14.265	16.050	14.292
Additional Pressures and Spend Requirements				
Utilities increased costs		1.000		
Pay award above budgeted 2% if 4% from 24/5			1.690	1.724
Children's Services restructure		2.633		
Increased gap to take account of 22/3 pay award at £1,925 on all pay points		3.000		
Impact if same pay award for 23/4 over and above current budget assumptions		3.857		
Implications of increased Real Living Wage for commissioned services/contracts		3.200		
Members allowances uplift agreed after 22/3 budget set - full year effect		0.109		
Recurrent increase in Waste and Transport Levies		1.120		
Unachievable C Tax and B Rates Growth as per existing MTFS		0.560		
Airport dividend, receipt now in 26/27				5.900
Benefit from NI increase being dropped		(0.540)		
Revised Cumulative Budget Gap		29.204	32.679	38.545

3. LET'S Do It! – a policy-led approach to managing Council resources

The 'LET'S Do It!' 2030 Strategy provides the strategic framework for the Council's use of resources through the vision to:

- Build on the strengths that already exist in our communities, breaking down barriers for people and between agencies and services to give people the ability to be independent
- Deliver in partnership, locally whenever possible and through a digitally inclusive approach
- Drive economic growth to improve outcomes for local people; reduce the demand on public services and increase income to the Council.

From a budget planning perspective, the application of the LET'S Do It! strategy is an opportunity to:

- Empower local people and organisations to seek self-help and community-based support rather than immediately engaging with statutory services. Over the last two years the Council has made available over £750,000 in funding to establish and support the development of local community groups. The scale of community potential is now evident through the anti-poverty response, for example, with over 80 organisations active in providing cost of living support and the emergence of the Bury Community Support Network
- Tackle health inequalities through a comprehensive local Wellness offer.
- Take a stronger focus on prevention and harnessing community capacity, which has been at the heart of the adult social care transformation, through which c£20m of savings have been achieved since 2019/20
- Drive innovation such as through the internal transformation strategy which is now enabling digital-first, more efficient processes, user self service
- Deliver inclusive growth through regeneration in order to reduce deprivation and therefore demand on expensive reactive Council and other public services. Growth also creates the potential for increased income from council tax and business rates receipts, through delivery of a pipeline of brownfield-first housing and new locations for business.

As far as possible budget savings options will be developed which are consistent with the LET'S Do It! principles. At this stage the assessment is that most savings can be achieved in a way that is strategically congruent, through a focus on community capacity/self-help within high-cost social care provision; by driving internal efficiency or growing income.

The options developed also take account of the output from a series of community conversations which took place across August of this year (see consultation section below for more detail).

However, the scale of reduction required means it is unlikely that the full value of budget reduction may be achieved in this way. Some options will therefore be necessary which simply relate to a reduction in controllable costs. Such proposals will be minimised, and every opportunity will be taken through consultation to mitigate these impacts and consider alternatives.

Proposals under development at this stage total £25.090m which leaves a recurrent shortfall against the 2023/24 forecast budget gap of £4.114m with a further £3.475m to be identified for 2024/25 and £5.866m for 2025/26. Further, not all of the options identified to date will deliver the full savings value in year one. Work will continue over the coming months to increase the options available and profile the delivery of savings, for finalisation when the national funding settlement is announced.

4. Indicative proposals to balance the budget

A range of options totalling £25.090m to date are under development across the themes of:

1. Efficiencies from strategic financial management such as appropriate use of capitalisation; the Housing Revenue Account and reviews of budget assumptions
2. Increasing income generation including council tax and business rates; pursuing external funding, service trading and an uplift in fees and charges
3. A strategy to reduce the cost of high-cost social care placements including:
 - a. Implementation of the Hertfordshire family safeguarding model, stepping down of high-cost children's placements and progressing the edge of care service, all of which were reported within the July Cabinet reports on children's services
 - b. Developing future strategy for cost containment including an all-age disability strategy and the development of specialist housing provision and increased in borough foster placements
4. Service reviews including efficiency savings in a range of functions across Departments and reviews of grants to voluntary and community sector partners
5. Transformation of services through ongoing investments in technology including the accelerated roll out of LED street lighting and the development of specialist housing provision as an alternative to conventional care settings
6. Workforce cost savings through the proactive promotion of voluntary unpaid leave and a further £100k reduction in Chief Officer related costs.

The table below identifies the early work undertaken within the broad categories and the proposed phased savings delivery over the next four years. The full schedule of options is included in Appendix Two, divided between proposals

which are considered strategically congruent and other proposals for savings in the context of the sheer scale of budget reductions required, but where there will be a requirement to mitigate impacts by prioritising operational delivery to reduce impact on outcomes.

Option	Approx FTE Impact	Total saving £k	23/24	24/25	25/26	26/27
Strategic Financial Management		5,759	4,659	5,159	5,659	5,759
Income Generation		6,553	7,893	4,522	6,153	6,553
High-Cost Social Care Placements		7,261	4,037	5,342	6,453	7,261
Additional purchase of unpaid leave and reduction in Chief Officer costs		700	600	700	700	700
<i>Departmental Options</i>						
Business Growth & Infrastructure	6	450	300	300	450	450
Children & Young People	0	66	66	66	66	66
Corporate Core including Finance	27	1,892	1,165	1,348	1,804	1,892
One Commissioning Organisation	25	1,532	1,132	1,532	1,532	1,532
Operational Services *	17	877	677	877	877	877
Total	75	25,090	20,529	19,846	23,694	25,090

* a review of the Public Health funded health improvement initiatives will be brought forward as an alternative proposal before Christmas

Proposals under development at this stage total £25.090m which leaves a recurrent shortfall against the 2023/24 forecast budget gap of £4.114m with a further £3.475m to be identified for 2024/25 and £5.866m for 2025/26.

Work will continue over the coming months to identify options which close this gap, including maximising the financial opportunities through devolution and ongoing efficiencies. The Council's reserves will be used to close any shortfall whilst implementation progresses.

It should be noted that over the last two years the Council has utilised £27m of its reserves in order to support with the increased demands and reduced income caused by the pandemic and does not have large amounts of general reserves which are not earmarked or ringfenced grants. The detail of the call on reserves will be assessed once options are finalised and a phasing plan agreed. However, early work on the Council's current available reserves suggests that whilst these may be sufficient to smooth the projected position for 2023/24, based upon the current level and phasing of savings delivery they are not sufficient to smooth the position as it currently stands in 2024/25.

5. Public Consultation

The Council has a legal duty to consult on its budget proposals before any decision is made. The process will involve the public, stakeholders and businesses and will include:

- An initial eight-week consultation period on the overarching budget strategy commencing on 20th October and finishing on 15th December 2022 with a view to reporting back to budget Cabinet on 15th February 2023.
- Specific consultation on the detail of individual options where required with appropriate groups, organisations and individuals prior to the final decision on the option being taken.

5.1 Public Consultation on budget strategy

The public consultation process began in August 2022 through a series of budget conversations with local people which were facilitated by Community Hub teams and supported by an on-line questionnaire. A summary of the feedback received from this preliminary engagement is enclosed at Appendix One.

The Council will now proceed with formal consultation on the budget strategy, through an online survey (paper copies available on request) and a series of engagement events. It will be publicised via the press and social media. The consultation will seek views on:

- The council's approach to setting its budget for 2023/24
- The equality impacts of potential options
- Alternatives to mitigate the impact of necessary reductions
- Options to close the gap

5.2 Public consultation on specific options

Where consultation is required, it should always start as soon as reasonably practicable, and several of the emerging savings proposals will therefore begin consultation following this meeting. These are the proposals to:

1. Uplift to Council fees and charges
2. An options appraisal of Bury Art Museum in the context of the culture strategy due for approval in November 2022 and the poor state of building condition
3. Remodel the sheltered housing service and move to support through alternative existing sources of support to achieve better utilisation of the Housing Revenue Account.
4. Compliance with the Care Act requirement that Care Packages only include assistance to take medication where the carer is also meeting another need at the same time, such as personal care or assistance with food.

Each consultation will consider the specific stakeholders and therefore the approach to take but could include surveys, focus groups, briefings and meetings.

Consultation on other options that have a direct impact on service users or other stakeholders will be brought forward as and when individual service review detail is considered.

6. Workforce Considerations and Consultation

The Council employs circa. 1,943 Full Time Equivalent staff (excluding those directly employed within schools) and spends in the region of £85m a year on its employees, which represents around a third of the organisation's expenditure.

The Council's workforce is central to the delivery of our LET'S Do It! vision for Bury, driving forward work to reduce deprivation and drive economic growth. In support of this, a significant programme of work to strengthen workforce engagement, capability and capacity is underway, aligned to the LET'S Do It! principles.

Whilst the impact of savings proposals on staff will not be finalised until the Council formally sets its budget, the emerging budget proposals include two overarching options which would directly impact on staff more broadly.

- A proposal to maximise savings through the voluntary purchase of unpaid annual leave
- A £100k reduction in the Council's costs associated with Chief Officers

In addition, delivery of the budget reductions required may involve around 75 redundancies across departments, as set out above.

The Council will formally consult on the potential staffing impacts of the budget strategy with the recognised Trade Unions and staff for a period of 90 days, from October 2022. This consultation will also consider the scope to mitigate compulsory redundancies. In addition, as the Council is contemplating more than 20 redundancies, it will be necessary to formally notify the Government's Insolvency Service about the proposals.

The purpose of consultation will be to consider alternatives to redundancy in delivering the Council's budget strategy and other options to deliver the required savings. Officers are already working on ways to minimise the requirement for compulsory redundancies including through tighter vacancy control; voluntary redundancies and work across Greater Manchester to understand areas of both demand and reduction in other local authorities.

Feedback from staff consultation will inform the Council's final budget proposals in February. Once the budget is set, additional consultation on the departmental savings options that affect staff, but which have not yet been developed in detail will follow, in line with the Council's agreed restructure policy.

Throughout this process there will be a continued focus on staff engagement and support to wellbeing, recognising both the impact of these potential changes on individuals and the anxiety this may cause as well as the workforce's continued work and commitment in support of Bury people.

7. Recommendation

Recommendations appear at the front of this report

Links with the Corporate Priorities:

Details are set out within the main body of the report.

Equality Impact and Considerations:

In setting its budget for 2023/24 and beyond the Council must be mindful of its obligations in relation to equality and inclusion; both the legal obligations set out in the Equality Act (2010) and coherence with the Authority's stated Equality Objectives and Strategy and the central role of inclusion within LET'S Do It!

A full Equality Impact Assessment (EIA) of the Council's budget will be developed over the coming months and included for consideration alongside the February budget report to Cabinet and Council. This assessment will take account of the results of the proposed general and proposal-specific consultations, include details of where potential equality implications are identified (both negative and positive) and set out the measures the Council will take to mitigate the negative implications insofar as is possible.

In addition to the overarching EIA, consideration will be given to the level of equality analysis required for each proposal individually and, where necessary, specific EIAs will be developed prior to the implementation of individual proposals.

The Council is committed to taking all possible measures to minimise the differential negative impact across the 13 protected characteristics recognised by our Inclusion Strategy.

Environmental Impact and Considerations:

There are no direct environmental impacts of the MTFS refresh although there may be some from within the specific savings proposals where these may include reduced travel or reduced consumption of utilities.

The accelerated roll out of LED street lighting will result in a direct reduction in energy consumption, which in turn will reduce the Council's Carbon emissions.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Failure to set a balanced budget resulting in external intervention	Ongoing work to identify further savings to close the recurrent budget gap

A negative impact of the budget on different protected groups	Robust Equality Impact assessment will be undertaken on the overall budget strategy and individual savings proposals
Budget proposals impede delivery of the LET'S Strategy	Close monitoring of delivery via the Executive Delivery Board and through regular Cabinet updates
Negative staff moral affects organisational delivery	Early and good engagement with staff and trade unions throughout the full budget process

Legal Implications:

This report updates members on the Medium-Term Financial Strategy and sets out the steps needed to progress with the Council's budget setting process.

It is proposed that consultation takes place with the public in relation to the budget proposals. The Council must consult where there are specific legislative requirements or where the public would legitimately expect the Council to do so. All consultation must take place at an early stage and must abide by the principles of good consultation. The outcomes from the consultation will be reviewed and brought to Cabinet for consideration. As set out in the body of the report workforce consultation will take place in relation to these proposals.

In addition to the specific legislative requirements which will be specific to the proposal the Equality Act 2010 states that public bodies must have "due regard" to a variety of equalities objectives under the Equality Act 2010. In order to ensure we have given due regard we need to demonstrate that we understand how decisions or policies can affect those with protected characteristics and whether they will be disproportionately affected. Consulting is therefore an important part of meeting the equality duty.

In setting the budget the Council has a duty to ensure:

- It continues to meet its statutory duties
- Governance processes are robust and support effective decision making
- Its Medium-Term Financial Strategy reflects the significant challenges being faced and remains responsive to the uncertainties in the economy by continuing to deliver against its savings targets
- Its savings plans are clearly communicated and linked to specific policy decisions, with the impact on service provision clearly articulated
- It has the appropriate levels of reserves and that it closely monitors its liquidity to underpin its financial resilience
- It continues to provide support to members and officers responsible for managing budgets
- It prepares its annual statement of accounts in an accurate and timely manner

In exercising its fiduciary duty, the Council should be satisfied that the proposals put forward are a prudent use of the Authority's resources in both the short and long term; that the proposals strike a fair balance between the interests of

Council taxpayers and ratepayers on the one hand and the community's interests in adequate and efficient services on the other; and that they are acting in good faith for the benefit of the community whilst complying with all statutory duties.

Section 28 of the Local Government Act 2003 also imposes a statutory duty on the Council to monitor during the financial year its expenditure and income against the budget calculations. If the monitoring establishes that the budgetary situation has deteriorated, the Council must take such action as it considers necessary to deal with the situation. This might include, for instance, action to reduce spending in the rest of the year, or to increase income, or to finance the shortfall from reserves.

Financial Implications:

The financial implications are set out in the body of report

Background papers:

Report to Cabinet: 13 October 2021 - Medium Term Financial Strategy Refresh 2022/23 – 2025/26

<https://councildecisions.bury.gov.uk/documents/s28734/Medium%20Term%20Financial%20Strategy%20Refresh%20202223%20-%20202526.pdf>

Report to Cabinet: 16 February 2022 - The Council's Budget 2022/23 and the Medium Term Financial Strategy 2022/23 - 2025/26

<https://councildecisions.bury.gov.uk/documents/s30027/The%20Councils%20Budget%202022-23%20and%20the%20Medium%20Term%20Financial%20Strategy%202022-23%20-%202025-26.pdf>

Please include a glossary of terms, abbreviations and acronyms used in this report.

Term	Meaning
MTFS	Medium Term Financial Strategy

Appendix 1: Budget Conversation Feedback

How might the Council deliver more in partnership?	What opportunities could be explored to generate more income
<ul style="list-style-type: none"> • Give people more info on potential cuts and be honest and open. • Reach out to existing groups and ask for support. • Work more with local businesses • Should not go into partnership if has cost increases • Engage and be more visible to public • Build more council affordable housing • Hire out council offices to private sector • Explore Park and Ride schemes with TfGM • Sharing costs on green energy schemes such as solar panels • Work alongside neighbouring councils, increase buying power, do once rather than doing the same. 	<ul style="list-style-type: none"> • Rent out or sell under-used or derelict buildings • Pop up businesses/ spaces • Sell more land to build affordable homes • Keep open buildings which are used and explore additional uses of these • Close takeaways reduce cost on NHS • Cloth Nappy incentive scheme – would reduce waste and bin collections • Hold more events with opportunity to fundraise • Increase fines and ensure enforcement for litter and dog waste. • Put a tax on vapes and filter this money into the council. • Bid for more external funding • Demand the two MP's do more in terms of levelling up and getting us a better deal
What opportunities are there to work with local residents to reduce demands on council services	Any other opportunities to reduce costs
<ul style="list-style-type: none"> • Engage and involve more volunteers – • Green spaces – local communities can assist • Get active experienced volunteers to support others to be up-skilled and to volunteer in their local areas • Increase funding for potential groups and volunteers • Support chaplaincy work more, get public services to promote to help with mental health support • Change approach to management of green spaces, leave more area to grow wild • Issues raised re poor customer service when reporting issues 	<ul style="list-style-type: none"> • Does the bin collection being phased cost more? • Cut rates for shops so Bury does not end up like other small towns • Are we recycling enough to generate income for the community / local businesses? • Educate people on the importance of nutrition, this way people are less likely to develop conditions which will burden the NHS because of poor incorrect nutrition. • Make more buildings/ homes energy efficient • Lampposts to be energy efficient • Make more buildings eco-friendly (not waste energy) • Shut down old buildings

<p>with bins and impact this had on behaviours</p> <ul style="list-style-type: none">• 1-2-1 support residents to recycle more• More support for young people to prevent long term issues and demand as adults	<ul style="list-style-type: none">• Reduce executive salaries• Brown bins emptied less in winter• Help communities grow veg and fruit in open spaces• Reduce lighting Council buildings all day and night
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Appendix2.1: Strategically Aligned Proposals

Option	Total saving £k	23/24	24/25	25/26	26/27
Strategic Finance					
Homeless Prevention Grant	464	464	464	464	464
Remove non allocated ASC budget	100	100	100	100	100
Remove ASC demographic growth	1,000	1,000	1,000	1,000	1,000
Reduction in Contract value for homeless prevention service for people with complex needs	74	74	74	74	74
Technical review of individual non-allocated budget lines identified by finance in conjunction with budget holders	500	500	500	500	500
Technical review by finance of all revenue costs of capital, including depreciation, interest etc and other technical accounting entries	1,118	1,118	1,118	1,118	1,118
Reduction in Children's budgetary provision for early retirement costs, in accordance with demographic changes	200	100	100	100	200
Better utilization of the Housing Revenue Account	1,500	500	1,000	1,500	1,500
Capitalisation of Business. Growth and Infrastructure spend on Regeneration	200	200	200	200	200
Capitalisation of Staff salaries in Operational Services - Engineers	189	189	189	189	189
Increase in vacancy factor	414	414	414	414	414
Sub-Total	5,759	4,659	5,159	5,659	5,759
Service Reviews					
Joint Equipment Store	70	70	70	70	70
Early Help	66	66	66	66	66
Continuation of LED street Lighting implementation	300	100	300	300	300
Sub-Total	436	236	436	436	436
Transformation Models					
Invest to save - Housing complex care	281	281	281	281	281
Invest to save - Shared lives	11	11	11	11	11
Invest to save - Assistive technology	342	342	342	342	342
Sub-Total	634	634	634	634	634

High-cost social care					
Children's External placements	200	200	200	200	200
Children's short breaks & personal budgets	300	300	300	300	300
Step down of very high-cost placements across children's (24 high-cost placements non DSG funded)	1,000	1,000	1,000	1,000	1,000
Review of working age adults' costs against a robust national toolkit.	1,700	1,000	1,700	1,700	1,700
Development of wider learning disabilities strategy for age 14-25 cohort	700	120	300	480	700
Progressing the edge of care service review	1,200	1,000	1,200	1,200	1,200
Implementation of the Hertfordshire family safeguarding model	1,175	0	0	587	1,175
Accelerating work on children's fostering capacity	417	417	417	417	417
Additional savings from Health and Housing beyond the £431k already inc. in the MTFS	569	0	225	569	569
Sub-Total	7,261	4,037	5,342	6,453	7,261
Income Generation					
Staying Well Service (Recharge)	375	375	375	375	375
Growth in vehicle maintenance provision to additional customers	100	100	100	100	100
Review of fees & charges	1,000	1,000	1,000	1,000	1,000
Multi-disciplinary early help	124	124	124	124	124
Council Tax & business rates growth	1,300	0	400	900	1,300
Review of business rates reset date and CPI	6,566	4,488	5,435	6,566	6,566
Business rates reset in 24/5	-5,093	0	-5,093	-5,093	-5,093
Better Care Fund 2022/23 inflation	631	631	631	631	631
Better Care Fund 2023/24 inflation	300	300	300	300	300
Review utilisation of Disabled Facilities Grant	250	250	250	250	250
Residents transitioning to alternative packages	750	375	750	750	750
Investment Income	250	250	250	250	250
Sub-Total	6,553	7,893	4,522	6,153	6,553
Total	20,643	17,459	16,093	19,335	20,643

Appendix 2.2: Additional options for savings and efficiencies

This list of options will require further work in order to mitigate the impact on the Council's operations and commitments with LET'S Do It! and the Council's Corporate Plan however are included in this report as options for consideration within the overall budget.

Dept	Option	Total saving £k	23/24	24/25	25/26	26/27
OCO	Reduce public health budget	192	128	192	192	192
OCO	Enforce S22 of Care Act, only provide assistance with medication when part of a care package	636	300	636	636	636
Finance	Further service reviews within finance	463	150	307	463	463
Core	Service reviews within the Corporate Core	1,079	665	691	991	1,079
Core	Options appraisal of Bury Art Museum	250	250	250	250	250
Core	Review / reduction of grants to voluntary and community sector partners	100	100	100	100	100
BGI	Review with BGI of all Peppercorn/Free lease arrangements including utilities provided	200	50	50	200	200
BGI	Review funding of Economic Development Function	250	250	250	250	250
Operations	Cease health improvement services run through Operational services (PH budget)	577	577	577	577	577
Whole Council	Additional purchase of unpaid leave and reduction in Chief Officer costs	700	600	700	700	700
	TOTAL	4,447	3,070	3,753	4,359	4,447

Appendix 3: Options Templates

Executive Director	Sam Evans
Cabinet Member	Cllr Gold

Section A																						
Service Area	All service areas with fees and charges																					
Budget Option Description	Review of all fees and charges for the financial year 23/24 ensuring that any increase covers the cost of inflation and ensure that the impact on Bury residents is minimised.																					
Budget Reduction Proposal – Detail and Objectives																						
<p>Fees and charges set by Bury Council have undergone a review to ensure they reflect not only the cost of inflation and to ensure consistency across services. Fees and charges have been benchmarked to other Greater Manchester Authorities to ensure that they are in line with other local authorities.</p> <p>Work has been undertaken with each service area to identify the appropriate levels of increase, where applicable, and to ensure each increase has been considered on a case-by-case basis as well as looking at the overall impact on residents and businesses.</p> <p>Several services are subject to statutory charging agreements and these are set externally and not by the Council so are out of scope of this review. Examples include Licensing, such as application for premises license and variations fees. Penalty charges are included but are set by legislation. They are the same across GM authorities.</p> <p>Fees for New Roads and Street Works are set by GMRAPS (TfGM) for all GM authorities, and therefore are also outside of this review.</p> <p>Adult Social Care costs have been excluded from the proposed increase due to the majority being means tested and an increase would have little impact.</p> <p>Proposed increase in charges</p> <table><tr><th>Service</th><th>Fee</th><th>Proposed average increase</th></tr><tr><td>Waste management</td><td>Commercial Waste</td><td>Between 5% - 15%</td></tr><tr><td>Parks</td><td>Hire of facilities, allotments, car boot sales land hire, fishing permits and Peel Tower entry</td><td>10%</td></tr><tr><td>Environmental Health</td><td>Sampling, visits general fees and charges</td><td>Between 5% - 10%</td></tr><tr><td>Trading Standards</td><td>Testing & Stamping Weighing & Measuring Equipment, hourly charge for Business Advice</td><td>15%</td></tr><tr><td>Pest Control</td><td>Domestic and commercial insect and rodent control</td><td>10%</td></tr><tr><td>Leisure Services</td><td>Session fee's, discount cards, memberships, facility hire for dry and wet activities</td><td>10%</td></tr></table>		Service	Fee	Proposed average increase	Waste management	Commercial Waste	Between 5% - 15%	Parks	Hire of facilities, allotments, car boot sales land hire, fishing permits and Peel Tower entry	10%	Environmental Health	Sampling, visits general fees and charges	Between 5% - 10%	Trading Standards	Testing & Stamping Weighing & Measuring Equipment, hourly charge for Business Advice	15%	Pest Control	Domestic and commercial insect and rodent control	10%	Leisure Services	Session fee's, discount cards, memberships, facility hire for dry and wet activities	10%
Service	Fee	Proposed average increase																				
Waste management	Commercial Waste	Between 5% - 15%																				
Parks	Hire of facilities, allotments, car boot sales land hire, fishing permits and Peel Tower entry	10%																				
Environmental Health	Sampling, visits general fees and charges	Between 5% - 10%																				
Trading Standards	Testing & Stamping Weighing & Measuring Equipment, hourly charge for Business Advice	15%																				
Pest Control	Domestic and commercial insect and rodent control	10%																				
Leisure Services	Session fee's, discount cards, memberships, facility hire for dry and wet activities	10%																				

Bereavement Services	Rights of Burial, memorial charges	10%
Libraries	Photocopying, printing, hire charges, fines, room hire, IT charges and archives	Between 5% - 15%
Engineers	Permits, Traffic orders and miscellaneous fees	Between 5% - 15%
Licencing	Animal welfare, zoo, piercers, street trading and miscellaneous.	Between 5% - 15%
Markets	Trader fees	10%
Building Control	Domestic work	10%
Development Control	Pre-application advice, planning fees and advice	15%
Legal Services	Legal advice and licences	Between 5% - 15%
Registrars	Attendance at ceremonies & citizenship	10%
Private Rented Sector	Houses in multiple occupation licences, enforcement action costs and officer time	10%
Land Charges	Enquiries on decisions, other matters, land search fees	10%

	2023/24	2024/25
Increase in income range (£) - £850k - £1.5m	£1m	Inflation dependant
Staffing Reduction (FTE)	None	None
Is the proposal One-Off or Ongoing?	Ongoing and to be reviewed annually	
Which Budget Principle does the option relate to?	Income Generation	

Section B
<i>What impact does the proposal have?</i> Set out any impacts (positive and negative) on performance and costs
Property
None
Service Delivery
Service delivery will continue. Increases in fees and charges are reviewed to ensure that increases do not impact on demand.
Organisation (Including Other Directorates/Services)
Increases in fees and charges will need to be communicated. All services with fees and charges, except for schools, will be affected. Statutory fees and charges are included in the review, but not able to be altered.
Workforce – Number of posts likely to be affected.
None
Communities and Service Users
Service delivery will continue. Increases in fees and charges are reviewed to ensure that increases do not impact on demand or the community in an adverse way.

Other Partner Organisations

This is a council wide review.

Section C**Key Risks and Mitigations**

Risks	Mitigations
Increases in fees and charges will reduce demand	Heads of Service are to review all proposed fees and charges to ensure the community is not adversely affected or demand in the service drops.
Increased income of over 10% due to inflation will not be realised as cost to provide the service increases	Other efficiencies in service delivery will need to be considered by the specific departments to ensure that cost to provide the service remains viable.

Milestone

Once approved, all fees need to be increased as per individual factors	On a case-by-case basis after approval, with all being implemented by April 2023
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Section D

Is consultation Required?	Yes	
	Start Date	End Date
Staff		
Trade Unions		
Public	Oct 2022	Dec 2022
Service User	Oct 2022	Dec 2022
Other		

Section E**Financial Implications and Investment Requirements****Investment requirements – Revenue and Capital**

None

Executive Director	Lynne Ridsdale
Cabinet Member	Cllr Morris

Section A	
Service Area	Public Service Reform
Budget Option Description	Options appraisal of Bury Art Museum & the Tourist Information Centre
Budget Reduction Proposal – Detail and Objectives	
<p>Bury Council recognises the important role that culture plays in community and economic development. Through the leadership of the Arts and Museum service the Council became the first GM Town of Culture in 2019. It is intended that the current site of the Bury Art Museum will be included in the culture quarter of the Bury Town Centre Masterplan as a “Creatives” space as part of the scope for a significantly expanded events offer which is central to regeneration plans in Radcliffe and Bury through the new public sector hubs and flexi hall buildings.</p> <p>The Council’s Art Museum is presently central to the borough’s cultural co-ordination. Through the Museum the Council provides bespoke public exhibitions; an expansive educational offer to young people; a central engagement role with other creatives and meets the statutory obligation to protect and store/display its private art collection for the public.</p> <p>The Museum operates from a listed building which is in a state of disrepair and visitor numbers have, regrettably, reduced and not yet recovered post Covid.</p> <p>The service operates with a small team comprised of a manager, senior curator, a marketing assistant, and a small number of visitor assistants. In addition, the service provides a Tourist Information Service which, by operating from the front desk of Fusiliers Museum, also hosts the reception to the Fusiliers Museum.</p> <p>Independent advice on a potential borough culture strategy was sought and a model is under development around three strands of People, Programme and Place. It is proposed that the opportunity of a new culture strategy is taken to complete an options appraisal of the museum building and associated service.</p>	

	2023/24	2024/25	2025/26
Budget Reduction (£)	00	250.00	00
Staffing Reduction (FTE)	00	8.00	00
Is the proposal One-Off or Ongoing?	Ongoing		

Section B	
<i>What impact does the proposal have?</i>	
Set out any impacts (positive and negative) on performance and costs	
Property	Options appraisal to be completed for the building to reduce the costs and liability of repair and/or an income opportunity from investment and increased use.
Service Delivery	Public-facing museum service under review. Potential impact on the Fusiliers Museum offer as well as Bury Art Museum.

Organisation (Including Other Directorates/Services)
BGI capacity required to complete architectural assessment; major dependency on Bury town centre masterplan.
Workforce – Number of posts likely to be affected.
C8 FTE staff affected
Communities and Service Users
Exhibition access Fusiliers museum affected by any changes to reception support
Other Partner Organisations
Proactive engagement with community organisations to harness and encourage arts activity

Section C Key Risks and Mitigations	
Risks	Mitigations
Community opposition to any reductions or changes	<ul style="list-style-type: none"> Exhibition available across alternative locations Community consultation
Arts council funding withdrawn for museum roof on basis of any change in use	<ul style="list-style-type: none"> Exploratory conversations required
BGI capacity to include museum within Masterplan programme	<ul style="list-style-type: none"> Site formally included in culture quarter proposals
Ability to engage meaningfully with Arts Council/deliver change, outside of directly impacted staff group	<ul style="list-style-type: none"> Potential short term dedicated project support required, funded by UKSPF
Insurance costs/arrangements for collection	<ul style="list-style-type: none"> Advice required
Key Delivery Milestones: Include timescales for procurement, commissioning changes etc.	
Milestone	Timeline
Options appraisal	October - December
Approval of preferred option by Council	February 2023
Implementation	According to wider dependencies in masterplan

Section D		
Consultation Required?	Yes	
	Start Date	End Date
Staff	Oct 2022	Dec 2022
Trade Unions	Oct 2022	Dec 2022
Public	Oct 2022	Dec 2022
Service User		
Other		

Section E: <i>Financial Implications and Investment Requirements</i>

Investment requirements – Revenue and Capital
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TBC

Executive Director	Will Blandamer
Cabinet Member	Cllr Tariq

Section A	
Service Area	One Commissioning Organisation
Budget Option Description	Better utilisation of the HRA - Sheltered Housing / Support at Home
Budget Reduction Proposal – Detail and Objectives	
<p>Support at Home is for people over the age of 55 who need support to continue living in their own home. There are two elements to the Support at Home service:</p> <ul style="list-style-type: none"> • Support to 17 Six Town Housing sheltered accommodation schemes across the borough • Support to those in their own homes across the borough (Six Town Housing tenants, private tenants and homeowners) <p>Originally the service was for those in sheltered accommodation schemes only. However, an additional contract for people living in their own homes across the borough was added at a later stage and named the Bury Floating Support Service. Although these are separate contracts, they are delivered by one service (Support at Home). There is one team of 22 people employed by the Council that works across the borough, as including the wardens. At present, there are approx. 350 tenants/customers across the 17 schemes and 155 customers in the wider community.</p> <p>A review of the Support at Home Team is underway and initial findings suggest there is some duplication with other services. This proposal would see the Support at Home service decommissioned (non-statutory elements) and alternative support and signposting provided via a tenancy sustainment service.</p> <p>Tenants/customers who require personal care are referred to the Connect and Direct Hub and those with complex tenancy issues are referred to the Six Town Housing Tenancy Sustainment service which deals issues such as rent, finances, anti-social behaviour and hoarding. There is currently a team of Tenancy Sustainment Advisors and a team of Neighbourhood Advisors that are going through a re-structure at present but who cover some of the same work area at the support at Home Team.</p> <p>Some people accessing the Support at Home service also have care needs and receive other Care at Home support under the Care Act. Support at Home staff can offer support with lower-level tasks and are keen to reduce loneliness and social isolation. This support is also offered by other services and the voluntary and community sector. For example, many referrals come from the Staying Well Team who also offer information, advice and signposting to people aged 50 and over, however, they are short-term and often refer into the Support at Home service when longer-term support is needed whoever this would be reviewed within this proposal.</p> <p>Referrals to the Support at Home service are also received from Social Workers and self-referrals are also accepted. These referrals need to be considered as part of the developing Integrated Neighbourhood Model which looks at provision in a locality in</p>	

the round to ensure residents are connected to the most appropriate support. For example, Age UK Bury is commissioned to deliver Information and Advice, Befriending and a Handyperson service.

The support at home service also provides personal care to customers at Falcon and Griffin extra care. This is a statutory service provided to customers eligible under the Care Act and is not affected by this proposal, this service will continue.

	2023/24	2024/25	2025/26
Budget Reduction (£)	£500,000	00	00
Staffing Reduction (FTE)	TBC	00	00
Is the proposal One-Off or Ongoing?	Ongoing		

Section B

What impact does the proposal have? Set out any impacts (positive and negative) on performance and costs

Property

None

Service Delivery

The current service will be decommissioned and alternative services/signposting to more appropriate support via a tenancy sustainment service. Sheltered accommodation schemes covered:

- Beech Close, off Ostrich Lane, Prestwich, M25 1GP
- Chelsea Avenue, Radcliffe, M26 3NF
- Clarkhill, off Rectory Lane, Prestwich, M25 1BE
- Elms Close, Whitefield, M45 8XR
- Griffin Close, Bury, BL9 6LG
- Hampson Fold, Radcliffe, M26 4PP
- Harwood House, Wesley Street, Tottington, BL8 3NW
- Limegrove, Ramsbottom, BL0 0BD
- Maple Grove, Tottington, BL8 3EB
- Moorfield, Wordsworth Avenue, Radcliffe, M26 3QY
- Mosses House, Frank Street, Bury, BL9 0RY
- Stanhope Court, Bury New Road, Prestwich, M25 3BE
- Taylor House, Brandlesholme Road, Bury, BL8 1HS
- Top o Th fields, Whitefield, M45 7FA
- Welcombe Walk, Whitefield, M45 7HE
- Waverley Place, off Abden Street, Radcliffe, M26 3AQ
- Wellington House, Haigh Road, Bury, BL8 2NG

Organisation (Including Other Directorates/Services)

Social Work Teams
Staying Well Team and other Council colleagues
Six Town Housing
Registered Providers (Care at Home)
Voluntary Sector Partners

Workforce – Number of posts likely to be affected.

Up to 22 are part of the support at home service, the emergency response service and the extra care service at Falcon and Griffin.
These posts would be subject to restructure and may be at risk of redundancy on conclusion of the review.

Communities and Service Users

Existing customers living in current sheltered Housing Schemes and their own homes, currently supported by the Support at Home service (non-statutory)

Other Partner Organisations

Section C Key Risks and Mitigations	
Risks	Mitigations
Cost implications of existing workforce	Opportunities for redeployment
Savings are not achievable	Clear work programme in place describing how savings will be achieved.
Negative response from existing community	Engagement and communications plan
HR Capacity to manage change	Clear programme in place with named leads
Needs to run alongside the Sheltered Housing Review and Reprovision of new Extra Care	Clear programme in place with named leads and timelines
In conjunction with the Assisted Technology programme	Clear programme in place with named leads and timelines
Key Delivery Milestones <i>Include timescales for procurement, commissioning changes etc.</i>	
Milestone	Timeline
Staff Engagement	Oct 2022

Section D		
Consultation Required?	Yes	
	Start Date	End Date
Staff	TBC	TBC
Trade Unions	TBC	TBC
Public	TBC	TBC
Service User	TBC	TBC
Other	No	

Section E: Financial Implications and Investment Requirements

Investment requirements – Revenue and Capital
N/A

Executive Director	Will Blandamer
Cabinet Member	Cllr Tariq

Section A			
Service Area		OCO	
Budget Option Description		Enforce Section 22 of the Care Act	
Budget Reduction Proposal – Detail and Objectives			
<p>Section 22 of the Care Act 2014 states that a local authority may not meet people’s needs by providing a service that should be provided under the NHS Act 2006 unless doing so is merely incidental or ancillary to doing something else that meets need.</p> <p>This means where a person requires a reminder, or prompt or assistance to take medication the local authority may only provide a care package to do this where the carer is also meeting another need at the same time, such as personal care or assistance with food. Where the support is only with medication the local authority is not required to provide care.</p> <p>Where medication is the only need and there are no other eligible needs that need meeting at the same time then this is the responsibility of the NHS under the NHS Act 2006</p> <p>An analysis for home care provision in Bury found a number of calls are now only for medication prompting or assistance.</p> <p>The total cost of providing these calls is £636,000 per year and equals 30,000 hours of care a year or 82 hours per day (approximately 300 calls per day)</p> <p>Option 1</p> <p>This proposal sees the calls for medication only stopped and responsibility transferred to the NHS - this process for the number of people and calls would take one year. A year would be required for the reviews to take place and for the NHS to fund and recruit the staff required to take on this task</p> <p>Option 2</p> <p>The NHS funds the local authority to continue to meet this need on their behalf. This could be implemented almost immediately using a S75 agreement and the better care fund pooled budget</p>			
	2023/24	2024/25	2025/26
Budget Reduction (£)	£636,000	00	00
Staffing Reduction (FTE)	0	0	0
Is the proposal One-Off or Ongoing?	On going		

Section B
<i>What impact does the proposal have?</i>
Set out any impacts (positive and negative) on performance and costs
Property
None
Service Delivery

Service users would no longer receive a call from a carer provided by the local authority, it would now be provided by a carer or nurse provided by the NHS
Organisation (Including Other Directorates/Services)
No effect on Bury Council
Workforce – Number of posts likely to be affected.
0
Communities and Service Users
Service users would no longer receive a call from a carer provided by the local authority, it would now be provided by a carer or nurse provided by the NHS
Other Partner Organisations
The NHS would have to commission a service to deliver this care or enhance the district nursing service to meet these needs

Section C Key Risks and Mitigations	
Risks	Mitigations
There may be insufficient district nurses to take on this task	Prompting of medication does not need to a registered nurse, it can be done by a health care assistant. Health care assistants could be employed by the NHS instead
Key Delivery Milestones <i>Include timescales for procurement, commissioning changes etc.</i>	
Milestone	Timeline
	Option 1 would take one year to implement Option 2 could be implemented in a matter of weeks

Section D		
Consultation Required?	Yes	
	Start Date	End Date
Trade Unions		
Public		
Service User	Oct 2022	Dec 2022
Other – NHS partners	Oct 2022	Dec 2022

Section E Financial Implications and Investment Requirements	
Investment requirements – Revenue and Capital	
None	

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