AGENDA FOR

CABINET

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To: All Members of Cabinet

Councillors : E O'Brien (Leader and Cabinet Member, Strategic Growth) (Chair), C Cummins (Cabinet Member, Housing Services), R Gold (Cabinet Member, Finance and Communities), C Morris (Cabinet Member, Culture, Economy & Skills), A Quinn (Cabinet Member, Environment, Climate Change and Operations), T Rafiq (Cabinet Member, Corporate Affairs and HR), L Smith (Deputy Leader and Cabinet Member, Children and Young People) and T Tariq (Deputy Leader and Cabinet Member, Health and Wellbeing)

Dear Member/Colleague

Cabinet

You are invited to attend a meeting of the Cabinet which will be held as follows:-

Date:	Tuesday, 7 November 2023
Place:	Bury Town Hall
Time:	6.00 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 FOR ABSENCE

2 DECLARATIONS OF INTEREST

Members of Cabinet are asked to consider whether they have an interest in any of the matters of the Agenda and, if so, to formally declare that interest.

3 PUBLIC QUESTION TIME

Questions are invited from members of the public about the work of the Cabinet.

Notice of any question must be given to Democratic Services by midday on Friday, 3rd November 2023. Approximately 30 minutes will be set aside for Public Question Time, if required.

4 MEMBER QUESTION TIME

Questions are invited from Elected Members about items on the Cabinet agenda. 15 minutes will be set aside for Member Question Time, if required.

Notice of any Member question must be given to the Monitoring Officer by midday Thursday, 2nd November 2023.

5 MINUTES *(Pages 5 - 12)*

Minutes from the meeting held on 5 October 2023 are attached.

6 QUARTER ONE AND QUARTER TWO CORPORATE PLAN PERFORMANCE REPORT 2023/24 *(Pages 13 - 40)*

Report of the Cabinet Member for Corporate Affairs and HR is attached.

7 QUARTER 2 BUDGET MONITORING REPORT *(Pages 41 - 88)*

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

8 RADCLIFFE REGENERATION, INTERIM SERVICE ARRANGEMENTS *(Pages 89 - 98)*

Report of the Leader and Cabinet Member for Strategic Growth is attached.

9 MILL GATE STRATEGIC REGENERATION FRAMEWORK *(Pages 99 - 300)*

Report of the Leader and Cabinet Member for Strategic Growth is attached.

10 SUBSTANCE MISUSE SERVICE CONTRACT *(Pages 301 - 380)*

Report of the Cabinet Member for Health and Wellbeing is attached.

11 HOUSING SUPPORT SERVICE: YOUNG PEOPLE 18-25 YEARS - CARE PROVIDER CONTRACT AWARD - PART A *(Pages 381 - 388)*

Report of the Cabinet Member for Health and Wellbeing is attached.

12 TOPPING MILL MENTAL HEALTH SUPPORTED LIVING SCHEME - PART A *(Pages 389 - 414)*

Report of the Cabinet Member for Health and Wellbeing is attached.

13 STRATEGIC HOUSING REVIEW - FUTURE MANAGEMENT AND MAINTENANCE OF COUNCIL HOUSING *(Pages 415 - 424)*

Report of the Cabinet Member for Housing Services is attached.

14 MINUTES OF ASSOCIATION OF GREATER MANCHESTER AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY *(Pages 425 - 442)*

To consider the minutes of meetings of the Greater Manchester Combined Authority held on 29 September 2023.

15 URGENT BUSINESS

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

16 EXCLUSION OF PRESS AND PUBLIC

To consider passing the appropriate resolution under Section 100 (A)(4), Schedule 12(A) of the Local Government Act 1972, that the press and public be excluded from the meeting for the reason that the following business involves the disclosure of exempt information as detailed against the item.

17 HOUSING SUPPORT SERVICE: YOUNG PEOPLE 18-25 YEARS - CARE PROVIDER CONTRACT AWARD - PART B *(Pages 443 - 448)*

Report of the Cabinet Member for Health and Wellbeing is attached.

18 TOPPING MILL MENTAL HEALTH SUPPORTED LIVING SCHEME - PART B *(Pages 449 - 454)*

Report of the Cabinet Member for Health and Wellbeing is attached.

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Agenda Item 5

Minutes of: **CABINET**

Date of Meeting: 5 October 2023

Present: Councillor E O'Brien (in the Chair)
Councillors C Cummins, R Gold, C Morris, A Quinn, T Rafiq and L Smith

Also in attendance: Councillors M Smith, J Lancaster, J Rydeheard and D Vernon

Public Attendance: One member of the public was present at the meeting.

Apologies for Absence: Councillor T Tariq and Councillor R Bernstein

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CA.57 APOLOGIES FOR ABSENCE

Apologies were received from Councillor Tamoor Tariq and Councillor Russell Bernstein, who was substituted by Councillor Jo Lancaster.

CA.58 DECLARATIONS OF INTEREST

There were no declarations of interest.

CA.59 PUBLIC QUESTION TIME

There were no public questions.

CA.60 MEMBER QUESTION TIME

The following question was submitted in advance of the meeting by Councillor Jack Rydeheard:

Following Bury Labour's attempt to change the Places for Everyone Plan, despite their acknowledgement on 21st July 2021 at Cabinet that they couldn't make changes to the plan after submitting it, are the "around 1,000" homes that they claim to have "found" in Bury town centre coming out of any of the other greenbelt allocations or is the Council's plan still to build excessively on all available greenbelt, particularly around Walshaw?

Responding, Councillor Eamonn O'Brien reported that on 21 July 2021, Cabinet approved the Publication Places for Everyone for consultation. At that meeting, it was noted that the Council were unable to make changes to the plan once it was submitted but the Planning Inspectors can make alterations.

After the Plan was submitted, new opportunities for housing in Bury and Radcliffe town centres were identified that were not confirmed at the time the Plan was submitted. These new opportunities were identified following extensive work on town centre masterplanning and the acquisition of the Mill Gate estate.

In light of this evidence, Cabinet considered the options and authorised officers to request a main modification to Places for Everyone to remove the proposed housing allocation at Walshaw.

The request for a main modification to remove the site at Walshaw was submitted to the Inspectors and further representation was made at the hearing sessions.

However, the Inspectors have considered the submitted evidence and discussions at the hearing sessions and have concluded that the requested modification to remove the Walshaw site is not necessary to make the plan sound and that the site should remain in the Plan along with the other proposed housing sites.

Whilst this conclusion is disappointing, it is considered that, on balance, this is outweighed by the benefits that come with continuing to participate in the joint plan, including having a housing target that is around 2,300 less than would otherwise be required.

A further supplementary question was submitted:

I'm confused as to why the Council's position is still to build excessively on the greenbelt, including Walshaw's. By default the Council voted to submit the Plan to the Independent Planning Inspectorate, having acknowledged that after it did so it couldn't then change it. I draw your attention to Bury Labour literature, which says: "successfully campaigned to take Walshaw out of the Greater Manchester Housing Plan". Obviously that's not happened. Will you admit your possible intent to mislead residents in this year's election campaign and apologise?

Councillor O'Brien reported that no one sought to mislead anyone in the election campaign. The leaflet referred to successfully developing the argument for the main modification and putting it to the Planning Inspectorate. People in Elton elected a Labour Councillor as they saw the effort put in on a range of issues, including this, to try and influence the Plan in the proper process by applying for a main modification.

The Planning Inspectorate has to follow Central Government planning policy and, following those rules, they have refused the modification and kept the Walshaw site in the Plan. We are disappointed by that but still support the overall PfE Plan as the alternative would put more sites at risk of development through planning by appeal, and all without guarantees, protections, and planning for infrastructure. Ultimately, the Plan will come back to Full Council for a final decision.

We have been clear with our decisions and our campaign about what we are trying to achieve. It was the decision of the government appointed Planning Inspectorate to keep the Walshaw site in. I am confident in the integrity of every single member of Bury Labour, and endorse their campaigns trying to get the best of plan like this, understanding the realities and not trying to mislead people.

CA.61 MINUTES

It was agreed:

That the minutes of the meeting held on 6 September 2023 be approved as a correct record.

CA.62 PLACES FOR EVERYONE: A JOINT DEVELOPMENT PLAN DOCUMENT FOR 9 GREATER MANCHESTER LOCAL AUTHORITIES (BOLTON, BURY, MANCHESTER, OLDHAM, ROCHDALE, SALFORD, TAMESIDE, TRAFFORD AND WIGAN) - PROPOSED MODIFICATIONS CONSULTATION

Councillor Eamonn O'Brien, Leader and Cabinet Member for Strategic Growth, presented the report which updated Members on the progress of Places for Everyone Plan: A Joint

Development Plan Document for nine Greater Manchester Local Authorities (PfE) and sought approval to consult on proposed modifications to the Plan. It was noted that the alternative option was to not approve the proposed modifications for consultation, and that the final decision on the Plan would come to Full Council in due course.

Councillor Dene Vernon, Chair of the Overview and Scrutiny Committee, confirmed that Scrutiny had met to review the report and had an informative and wide ranging discussion. This had included opportunity for public to ask questions and express their viewpoints. Assurances were given that Greater Manchester Ecology Unit had provided expert witnesses and that consultation feedback would go back to the Planning Inspectorate for consideration. The Scrutiny Committee noted the Council agreement for Cross Party Group to look at a Local Plan and agreed for this to be expedited.

Members discussed the report, including the following points:

- Members noted the advantage it would give in securing highly skilled jobs and apprenticeships and transport links to those sites, and the serious need for new and affordable housing stock to enable more people to own their own home.

- It was noted that recreation sites like playing pitches were protected, so if any were identified for development sites they would be replaced on a like-for-like basis.

- The cost of the process was born collaboratively by the 9 Local Authorities, and this work and those costs would still be required if Bury were developing its own Local Plan.

- It was understood that Stockport had received applications for developments on Green Field land, one of which had gone to appeal. The Leader noted the need to be proportionate about risk, but confirmed that not having a Plan put sites at risk, including those in Green Belt, and adopting this Plan would enable the Council to redirect developers to more appropriate sites.

- It was noted that, while Government targets were not mandatory, written guidance stated they were a 'minimum' and previous submissions had been rejected for not being ambitious enough. The report on the agenda today was regarding modifications to the Plan, but in theory a Full Council decision could be taken at any time to pull out of PfE. That, however, would put Bury in a worse position in protecting sites as PfE had enabled Bury to shift a significant proportion of the housing allocation to other boroughs.

- Councillor Morris expressed her disappointment that Walshaw was not removed from the Plan but advised that she still supported the Plan overall and would continue to lobby for Walshaw to be removed. It was noted that the additional housing site identified was still included in Bury's allocation but that the overall allocation was still lower than it would be outside of PfE.

- Finally, assurances were given that the consultation would be in accordance with the Gunning Principles, with evidence that the Planning Inspectorate listened to the public's feedback.

Decision:
Cabinet:

1. Noted progress made in respect of the Places for Everyone Joint Development Plan;
2. Agree that the modifications to Places for Everyone (Main, Additional and those relating to the policies map), and associated supporting background documents

be subject to a period of representations for a period of 8 weeks commencing no earlier than 9 October 2023; and
3. Agree the next steps for the production of Places for Everyone (section 15).

Reasons for the decision:
To ensure continued progress towards the adoption of the Places for Everyone Joint Development Plan as a key part of Bury's statutory development plan.

Other options considered and rejected:
To not approve the proposed modifications for consultation and to withdraw from Places for Everyone. However, this option is rejected on the basis that the Council would be unable to benefit from this opportunity to meet its statutory requirement to have an up to date development plan in place in the short-term. This would leave the Borough open to speculative and unplanned development with insufficient supporting infrastructure. Furthermore, as a joint plan of nine Greater Manchester districts, Places for Everyone has allowed for the redistribution of housing needs across the Plan area. As a result, Bury's housing target in the Plan is over 2,300 (24%) less than what would be required outside of the joint plan process using the Government's standard methodology. Therefore, withdrawing from Places for Everyone to pursue an alternative plan could result in Bury requiring a higher housing target and lead to the need for more Green Belt release.

CA.63 BURY LOCAL TRANSPORT STRATEGY

Councillor Eamonn O'Brien, Leader and Cabinet Member for Strategic Growth, presented the report which detailed the results of the draft Bury Local Transport Strategy consultation and sought approval for the final Strategy to be adopted and published to guide investment in transport improvements and future funding bids.

It was noted that the key issues were those of: poor quality of the existing network, which the GM Bee Network would address through better integration of bus systems with accountability to Local Authorities; safety and security for transport users, which would be taken into account when services and improvements were designed; and the tensions between car use and other modes of transport, with the Strategy supporting all modes of transport and ensuring residents had better choice for their journeys.

Members discussed the report, noting the discrepancies in London transport systems and their funding and that for Northern cities. It was noted that some journeys were necessary by car and that this Strategy was not oppositional to motorists. By giving better public transport alternatives residents would have greater choice and, by users using public transport when possible, congestion would reduce.

Decision:
Cabinet:
1. Noted the key themes raised in response to the consultation on the draft Bury Local Transport Strategy;
2. Accepted the post-consultation amendments;
3. Approved the revised Bury Local Transport Strategy as the final version to be adopted and published to guide investment in transport improvements over the next 10-15 years, inform future funding bids and make the case for investment in transport infrastructure and services in Bury; and
4. Noted the level of funding already secured or available to deliver elements of the Strategy up to March 2027.

Reasons for the decision:

The Bury Local Transport Strategy will guide investment in transport improvements over the next 10-15 years, inform future funding bids and make the case for investment in transport infrastructure and services in Bury.

Other options considered and rejected:
No other options were considered/were applicable.

CA.64 INSURANCE TENDER PROCESS AND AWARD OF CONTRACT

Councillor Richard Gold, Cabinet Member for Finance and Communities, presented the report which sought endorsement and approval for the procurement of the relevant Insurance Programme contracts due to commence on 1 April 2024 via an insurance Broker.

Decision:
Cabinet:

1. Approved the undertaking of the necessary procurement, via an insurance broker, of the relevant Insurance Programme contracts;
2. Delegated authority to the Executive Director of Finance (S151Officer), in consultation with the Cabinet Member for Finance and Communities, to undertake a tender process to ensure that appropriate Insurance arrangements are in place for the activities of the Council; and
3. Requested a report back to Cabinet on the results of the procurement exercise seeking authorisation of the award of contracts to the successful bidders and delegation of authority to the Executive Director of Finance and the Council's Monitoring Officer, after consultation with the Cabinet Member for Finance and Communities, to take the necessary actions required to implement that decision.

Reasons for the decision:
It is recommended the Council proceeds with a tender exercise to procure a new insurance programme. There is no option for a further extension of the existing arrangement. Proceeding without insurance cover is not recommended as the Council would risk significant claims spend – particularly if a total property loss was to be suffered. Completing a tender exercise will allow the Council to explore all available market options, which is considered advantageous whilst the insurance market remains unsettled. The market has hardened since Covid-19 due to global uncertainty and limited investment opportunities, making re-insurance more expensive.

Other options considered and rejected:
When the policies expire on 31st March 2024, the Council has only one alternative option – to do nothing and self-insure without additional insurance cover.

CA.65 BURY AND ROCHDALE YOUTH JUSTICE ANNUAL PLAN 2023-2024

Councillor Lucy Smith, Deputy Leader and Cabinet Member for Children and Young People, presented the report which provided a summary of the Bury and Rochdale Youth Justice Service (YJS) Annual Plan 2023-2024 which will be presented to Council for approval in November. In future years this would be considered by Scrutiny before being commended directly to Council.

Decision:
Cabinet commended the adoption of the Youth Justice Plan to Council.

Reasons for the decision:

The YJS annual plan is a statutory requirement to set out the priorities for the year ahead to support young people both to avoid entry into the criminal justice system as well as to work to support young people within the system to achieve improved outcomes and avoid repeat offending.

Other options considered and rejected:
Not applicable.

CA.66 AWARDING OF FROZEN FOOD CONTRACT TO A SUPPLIER ON BEHALF OF CATERING SERVICES

Councillor Tahir Rafiq, Cabinet Member for Corporate Affairs and HR, presented the report which regarding the award of the frozen food supply contract providing school meals across the borough.

Decision:
Cabinet authorised the award of the frozen food supply contract to JJ Food Services from 06/10/23 to 03/09/25 with 2 options to extend for an additional 12 months (2+1+1).

Reasons for the decision:
JJ Food Service achieved the highest scores across the three criteria as to cost, quality, and social value/ sustainability . It is therefore best placed to meet the needs of the catering provision as well as supporting the Council's strategic priorities and meeting the relevant governance and legal requirements.

Other options considered and rejected:
The Schools Catering team could revert to the AGMA (Association of Greater Manchester Authorities) preferred supplier, to which Bury Council can access; Dunster's Farms, however using Dunster's would not represent best value or quality as they achieved the lowest overall score of the five bidders who submitted bids in the Council's tendering exercise.

CA.67 MINUTES OF ASSOCIATION OF GREATER MANCHESTER AUTHORITIES / GREATER MANCHESTER COMBINED AUTHORITY

It was agreed:

That the minutes of the Greater Manchester Combined Authority meeting held on 28 July 2023 be noted.

CA.68 URGENT BUSINESS - STRATEGIC HOUSING REVIEW - FUTURE MANAGEMENT AND MAINTENANCE OF COUNCIL HOUSING - PART A

Councillor Clare Cummins, Cabinet Member for Housing Services, presented the report which updated Members on the results of the Tenant's test of opinion and progress following an earlier Cabinet report received in June 2023. It was noted that a statistically significant number of residents responded, 90% of whom were in favour of the proposals, and Members were pleased to also note that approximately 300 residents had also indicated they would want to be involved in improving neighbourhoods.

Decision:
Cabinet noted the outcome of the Tenants test of opinion and the service improvement plan activity to date.

Reasons for the decision:

To provide an update to the Cabinet.

Other options considered and rejected:
Not applicable.

CA.69 EXCLUSION OF PRESS AND PUBLIC

Decision:
That the press and public be excluded from the meeting under Section 100 (A)(4), Schedule 12(A) of the Local Government Act 1972, for the reason that the following business involves the disclosure of exempt information as detailed against the item.

CA.70 UPDATE ON FINANCIAL IMPROVEMENT PANEL

Councillor Richard Gold, Cabinet Member for Finance and Communities, presented the confidential report which provided an update on the progress in establishing the Finance Improvement Panel and the progress against the Finance Improvement Plan.

Decision:
Cabinet:

1. Noted the amended Terms of reference which include a strengthened primary purpose of "To ensure Bury Council is placed on a sustainable financial footing and is capable of delivering a sound MTFP"; and
2. Noted the Finance Improvement plan which will be monitored by the finance improvement panel on a monthly basis.

Reasons for the decision:
To update members on the progress regarding the Finance Improvement Panel and the Finance Improvement Plan.

Other options considered and rejected:
None.

CA.71 URGENT BUSINESS - STRATEGIC HOUSING REVIEW - FUTURE MANAGEMENT AND MAINTENANCE OF COUNCIL HOUSING - PART B

Councillor Clare Cummins, Cabinet Member for Housing Services, presented the confidential report which updated Members on the partnership arrangements with Six Town Housing.

Decision:
Cabinet noted the update and requested an updating report to be considered by Cabinet in November 2023.

Reasons for the decision:
To provide an update to the Cabinet.

Other options considered and rejected:
Do nothing; this option is not recommended.

COUNCILLOR E O'BRIEN
Chair

(Note: The meeting started at 6.00 pm and ended at 7.30 pm)

Agenda Item 6

Classification:	Decision Type:
Open	Non-Key

Report to:	Cabinet	**Date:** 07 November 2023
Subject:	Quarter One and Quarter Two Corporate Plan Performance Report 2023/24	
Report of	Cabinet Member for Corporate Affairs and HR	

Summary

1. This is the performance and delivery monitoring report for Quarters One and Two against the Corporate Plan for 2023/24. It contains full updates in terms of both the delivery against the priorities set out in the Corporate Plan and associated key performance indicators.

Recommendation(s)

2. Cabinet to note the update on progress against performance and delivery and the priorities for action against key metrics and timescales.

Reasons for recommendation(s)

3. N/A

Alternative options considered and rejected.

4. N/A

Report Author and Contact Details:
Name: Helen Corbishley
Position: Head of Performance and Delivery
Department: Corporate Core
E-mail: h.corbishley@bury.gov.uk

Background

5. This report details performance and delivery of each Council department against the priorities that have been set out in the 2023/24 Corporate Plan (See Appendix 1). This includes a summary of milestones that have been delivered and a performance table by department.

6. The performance tables include progress from the previous reporting point and against target. Where possible benchmarking targets for England, the North West or Greater Manchester have been used where this is not available a local stretch target has been derived from previous performance.

7. Direction of travel is indicated by an up or down arrow which is coloured red or green to note polarity (polarity cannot always been defined for all measures). Achievement against target is RAG highlighted within the square that the data resides in.

8. For the summary of delivery by department against the Corporate Plan, a RAG rating has been applied which indicates progress against the priority:

- GREY: Not started as per agreed timescales
- RED: On hold or potentially being re-evaluated against priorities
- AMBER: Behind but manageable within current plan/requirements
- GREEN: On track against original timescales
- BLUE: Complete

Summary of Performance and Delivery

9. To provide clarity on the direction of the Council, a 3Rs Planning Framework has been adopted to focus activity and ensure a balance between short-term priorities and longer-term strategic development. For every priority within the Corporate Plan milestones have been created which incorporate:

a. **Response**: Dealing with emerging issues and immediate need e.g. the pandemic, Cost-of-Living Crisis, Children's Improvement Plan.
b. **Recovery**: Building on short-term interventions to develop a sustainable model of delivery for the future, taking into account system pressures and changing demand e.g. Health & Care System Reforms, Special Educational Needs Transformation Plan.
c. **Renewal**: Longer term planning requiring large-scale investment, culture change and partnership work e.g. Inclusive Growth, Climate Change and Public Sector Reform.

10. Throughout the year, quarterly reports will be provided to Cabinet to monitor progress across the priorities and a wider set of Key Performance Indicators designed to provide transparency and accountability across the full range of Council functions.

Context

11. As noted in other system wide performance reports such as the Greater Manchester Strategy Progress Report for Autumn 2023: "The economic context continues to remain extremely challenging. Despite recent falls in overall inflation, the cost-of-living crisis continues to impact on the people and places of Greater Manchester, with evidence of increasing financial hardship and challenging circumstances not only for our residents but also significant challenges for the organisations and agencies involved in the delivery of the Greater Manchester Strategy."

12. The information below sets out activity against the Corporate Plan priorities, of which three were highlighted as the Council's main focus for 2023/24:

- Supporting residents and businesses with the cost-of-living crisis
- Improving Children's Lives
- Achieving Inclusive Economic Growth

13. **Cost-of-Living Crisis:** Since the launch of the Council's Anti-Poverty Action Plan, three Cost-of-Living summits have been held to ensure that the pledges are being delivered in conjunction with residents and communities. The Council is using around £3m from the government's Household Support Fund and money from the Council's budget on a range of support for residents and community groups to help them through the cost-of-living crisis including providing food and fuel vouchers, depending on circumstances and financial hardship, and supporting community and voluntary groups who are running food banks and pantries and those providing crisis support. As part of this nearly 7,000 pupils who receive free school meals have been supported to maintain access to healthy meals during the school holidays. Residents have also been supported with their skills and employment through workshops, interview support and help with improving digital skills to be able to access opportunities and apply for work.

14. **Improving Children's Lives**: In Quarter Two, the Council hosted Ofsted for the fourth monitoring visit since the local authority was judged inadequate. The inspectors focused on children at risk of sexual or criminal exploitation, missing from home or care and children at risk of radicalisation. Ofsted recognised that since November 2021, the local authority has continued to make steady progress on its improvement journey. Arrangements for children who are at risk from exploitation have been strengthened and the co-location of the multi-agency complex safeguarding team in the multi-agency safeguarding hub (MASH) with Greater Manchester Police has enhanced provision The risks and needs of children are identified early by an effective multidisciplinary team and this collaborative partnership approach supports the reduction of risks for many children. The inspection also found a strong commitment to developing contextual safety within different communities. For example, links have recently been made by dedicated workers with local faith leaders, to strengthen community awareness regarding indicators of potential child exploitation. However, despite these improvements, social work practice remains variable. The areas that require improvement include the timeliness

of strategy meetings, the quality of assessments, plans and supervision, and the response to children who go missing. These areas continue to be key areas of focus within the Children's Improvement Plan ahead of the next monitoring visit which is likely to be undertaken in November 2023.

15. For the first time since the pandemic there is a full and robust set of attainment data for the borough's pupils. This shows the impact that the pandemic has had on the academic progress of young people in the borough, but also that the work done by schools to support disadvantaged children has been effective in terms of benchmarking against statistical neighbours. Supporting improved attendance and the quality of schools in the borough remains a focus for the local authority, alongside preparing for a likely inspection of the provision for children with Special Education Needs.

16. **Achieving Inclusive Economic Growth:** In September the draft Economic Development Strategy was presented to the Council's Cabinet, setting out a clear framework to deliver a sustainable, competitive and inclusive local economy. This strategy recognises the significant new, highly skilled employment that will be created through the release of employment land at Atom Valley/Northern Gateway and the commitment to work with education and training providers to link Bury residents to these opportunities. During Quarters One and Two significant milestones have been reached in the delivery of the two Levelling-Up sites in the borough with ground being broken in Radcliffe in Quarter One and planning permission granted for the new flexi-hall in Quarter Two. To support these ambitions the borough's Local Transport Strategy was approved by Cabinet in September to support sustainable and inclusive economic growth and regeneration and improve connectivity across the borough and beyond, ensuring that those that do not have cars are able to use reliable and affordable transport to get to work, leisure and education.

Progress since the launch of the 2023/24 Corporate Plan

17. Building on the approach taken in 2022/23 this report provides the summary of activity to date and the status against the commitments in the Corporate Plan. This information is collated from detailed departmental level reports which are reviewed and approved by the Cabinet Portfolio Holder(s) and the relevant Executive Director.

18. The focus on this report in on a more limited set of key priorities which represent the Council's commitment to the ambitions of the LET'S Do It! Strategy. This approach has allowed for an understanding of how current activity contributes to the attainment of the outcomes, along with the opportunity to identify any levers within the system which could be used to support further improvement.

19. A summary of overall progress against these Corporate Priorities is provided below.

Progress against Corporate Plan Priorities

Priority	Key Deliverables	April – June 23	July – Sept 23

1. Supporting residents and businesses with the cost-of-living crisis	Deliver 2023/24 Action Plan within the Antipoverty Strategy	• Third partnership Cost of Living summit held in May which informed submission to DWP on Bury's allocation of Household Support Funding for 23/24 including continuation of Free School Meals during June half term.
		• Let's Help in Tough Times materials updated to reflect local/national offer.
		• Review of Money Advice Referral Tool with Greater Manchester Poverty Action.
		• Veterans and Cadets community fund launched.
		• Bury Council has also committed £400,000 to provide extra support including grants to households who are financially struggling and not eligible for the current council tax support, help for children in care and care leavers with cost of living, and support for traders on Bury Market.
			• Welfare team now linked with internal and external colleagues to maximise the spend and impact of Household Support Fund.
			• Activities in this quarter have included:
			  • Support for people with their skills and employment including expanding the Working Wardrobe scheme, which helps people with interviews including a recently held skills drop in at Radcliffe Football Club
			  • Help for people with their digital skills and to be able to get online including working with Six Town Housing tenants
			  • Providing energy efficient measures for households in need, particularly for owner occupiers and privately rented properties
			  • Promoting the Healthy Start vouchers for those pregnant or have children under the age of 4

2. Improving Children's Lives	**Childrens Social Care** Ensuring services for children and young people meet the required standards for good levels	• Soft-launch of the Family Safeguarding model with launch of the Family Safeguarding workbook to support multi-agency recording.	• Successful recruitment of adult workers to the Family Safeguarding Model. • Additional international social workers have arrived and will now

	of safeguarding and support	• First cohort of international social workers and have now been inducted into the Children's Workforce. • External diagnostic of Care Leavers service completed by DfE National Adviser. • Corporate Parenting sessions delivered by the LGA for the Executive Team and Members. • Commenced work at Redvales for the first family hub.	contribute to the reduction in Managed Social Work Teams. • The East Bury Family Hub is now in operation with an open day at the end of October. • Completed specification for Radcliffe and North Bury Family Hubs. • Update to the Children's Improvement Board following Department for Education Review visit.
	Educational Improvement Radcliffe School build commences Improve the proportion of schools good or better Academisation Strategy Improved attendance	• Development of school improvement and school cluster model. • Launch of Headteacher Hub. • Development of training and communication for schools and governors following the Department for Education Commissioning Statement. • Report prepared for Cabinet to consider in July around school capital programme progress.	• School Assurance Board meeting termly to identify schools causing concern, taking a more pro-active role. • Star Academy Radcliffe - planning applications for both modular and permanent build submitted. • Admission Arrangements publicised. • 88% of Bury Schools were judged good or better by Ofsted as at the end of August, an increase of 6% across the academic year (National average 89%).
	Special Education Needs Preparing for the new review of services by Ofsted through service transformation Project Safety Valve Plan Updated and Approved by Department for Education	• Over 70% of schools now using a Team Around the School approach. • Graduated approach training developed and shared with schools for formal delivery to school SENCos at the start of the school year	• The SEND multi-disciplinary inclusion panel has been refreshed with a focus on early support to families. • Early Year EHCPs have been reviewed. Annual Review Officer recruited to EHCP team. • New banding descriptors in place for SEND.

			• Revised Management plan for Project Safety Value submitted for consideration by the Department for Education.
3. Achieving Inclusive Economic Growth	Levelling-Up Sites commence construction	• Further development of plans for Levelling Up sites including Planning • Permission for groundworks in Radcliffe.	• Mobilisation work for Radcliffe Hub is due to begin in Mid-October, with £0.5m of additional external funding having been secured by the project team from Sport England. • Cabinet approval for Public consultation on the draft Strategic Regeneration Framework for Mill Gate will be submitted to the October committee cycle. • Consultants secured via Evergreen Funding for initial feasibility work on Bradley fold and Chamber Hall sites. Work will be completed between Oct and Dec.
	Township Plans for Whitefield, Prestwich and Ramsbottom	• Development of refreshed People and Communities Plans for each neighbourhood via collation of new data and needs assessments. • Prestwich Village ○ Neighbourhood forum decision approved at June Cabinet	• Prestwich Village ○ RIBA Stage 1 completion • Ramsbottom Public Realm (inc Square St) ○ Feasibility, consultation and detailed design complete ○ Planning application (subject to final agreed design) • Whitefield Town Plan ○ Draft Town Plan prepared
	Economic Development Strategy	• Support development of All Age Skills Strategy & BHEAST relaunch • Develop People and Place Plans in line with regeneration and inward investment supporting recruitment to key sector.	• Economic Development Strategy approved at September Cabinet. • Barclays LifeSkills Primary School Programme roll out – Bury Town Centre (Millgate) & Radcliffe.

		• Barclays LifeSkills Primary School Programme Pilot in Radcliffe Prestwich Works: Launch of cross border commission with Manchester and Salford.	• Designed bespoke localised employment health promotion programme.
	Skills Strategy	• First draft of All-Age Skills Strategy developed through multi-agency partnership including Department of Work & Pensions.	• Re-launch of BHEAST to deliver Skills Actions within the Economic Development Strategy
4. Improving the Health & Care System	Intermediate Care Transformation Plan	• Training needs analysis completed to ensure blended roles are working. • Provider and Service User Physical Disabilities network established. • Assistive Tech team established. • Implementation of remodelled Housing Assistance Policy. • Delivery of contract between Council and GP Fed for payment for Staying Well service. • Secured additional system capacity to scope and assess right size of Intermediate Care (IMC) capacity.	• Stand-alone Bed Base and stand-alone Home base service created by merging IMC@Home with Reablement. • Assistive Tech delivery. • Initial report on scope and size of IMC capacity and opportunity/requirement for new accommodation.
	Care Quality Commission Inspection Readiness	• Peer Challenge improvement plan prepared. • Updated self-assessment completed. • ASC performance Framework designed	• ASC performance framework implementation. • 'Getting the call' readiness plan.
5. Reducing Health Inequalities	Reducing the life expectancy gap by focusing on preventing and reducing the impact of the 3 key contributors CVD, Cancer and Liver Disease.	• Support the GP FED to develop a plan to support the delivery of the secondary prevention CVD work in General Practice. • Refine the new Wellness Model of delivery to focus work on key priorities • Complete first version of the Joint Strategic Needs Assessment.	• Updated local smoking plan. • Developed and implemented alcohol licensing matrix to support licensing decisions prevention CVD work in General Practice. • Planning commenced for a Team Bury event on health inequalities is to be held in December.

		• Bury Market became a Healthy Start voucher destination. • The Bury Tobacco Control Strategy refreshed and a plan with clear actions produced, approved by the Health and Wellbeing Board in June.	
	Narrowing the school readiness gap.	• Work in collaboration with the NCA to profile Health Visiting and School Nursing services to understand gaps in capacity and present options to the Children Strategic Partnership	• Review oral health and breast-feeding provisions and plans and update to ensure an equitable offer where appropriate
6. Tackling Climate Change	Deliver commitments to decarbonisation and household energy efficiency across the borough Launch internal climate change action plan	• Phase 2 - Replace 252x street lighting columns and LEDs • Phase 3 - Carry out design work/tenders for LED replacement	• GMCA Funding secured for solar farm feasibility at Bradley Fold to create more affordable energy costs in the future. • Completed Social Housing Decarbonisation (Wave 1) • Produced case study report on Community Climate Action Fund. • Replaced a further 252x street lighting columns and LEDs and 300x streetlights with LEDs. • Delivery of the remaining 13x electric vans to the Council fleet. • Established a working group to consider climate adaptation and resilience planning.
7. Public Sector Reform	Embedding Public Sectors Leadership Teams in each neighbourhood and taking a Person and Community Centred	• Concluded work to ensure capacity alignment to neighbourhood working, including Family Hubs, Improving Adult Lives Team and further steps on Integrated Neighbourhood Teams.	• Finalised the operation of Public Service Leadership teams in each neighbourhood. • Development of proposals for outstanding key partners – including schools and Six Town Housing.

	Approach to Public Sector reform	• Map of models of risk stratification completed - consistent and neighbourhood specific. • Map of models of strengths-based working and assessment of commonality of approach underway.	• Commenced Estate Strategy for co-location of public service workers in places where possible. • Development of a framework for consistent and multiagency approach, connected to LET'S experience.
8. Delivering sustainable Housing Growth	STH Options Appraisal Housing	• Completion of Options Appraisal for decision June 2023 Cabinet. • Launch of Tenants Test of Opinion.	• Tenants Test of Opinion delivered, to be reported to October Cabinet. • Implementation options in development to be presented at November Cabinet.
	Development to deliver 700 new homes	• Green St construction started. • Seedfield Planning approved • Former Police station – bid for 80 bed complex care home • Fletcher Fold (c.27 100% AH for Older people LD) Bids • Wheatfield SoS – 30 • Willow St 13 supported – planning • William Kemp Heaton 43 supported, planning decision • Supported HSG feasibility study (Young People and Complex Needs) • BLF submission pyramid park	• Work commenced on: ○ William Kemp Heaton (18 AH units for people with LD) ○ Willow St (13 units for young adults physical and/or sensory or LD)
9. Celebrating culture and supporting our creative sector	Launch and Implementation of new Cultural Strategy and development of programme of events	• Launch event for Strategy held in Bury Market. • Identified and submitted bids for funding opportunities including LIF 3, MEND and GMCA funding • Input into emerging Governance review for Culture Strategy in GM. • Events calendar go live.	• Support plans for commercialisation of Bury Art Museum – options appraisal with Market Curators • Launch of new Visit Bury website. • Summer programme of events launch including Head of the Hills / Burr Live.

Key Performance Indicators

20. In additional to monitoring delivery against Corporate Plan priorities, each Department has developed a core set of key performance indicators which are used to trach changes in demand, delivery against customer standards and performance against agreed benchmarks.

21. These indicators cover a range of business as usual (BAU) activities as well as project specific measures where appropriate and are set out in Appendix Two of this report.

22. In summary these indicators provide evidence of the increased demand for services, particularly in relation to social care for Children and Adults, but also in terms of pressure on other Council Services with regards to volume of activity required.

Conclusion

23. At the end of Quarter Two there is significant evidence of delivery against the Corporate Plan Objectives despite the challenging economic and increased demand on services. There is some slippage noted by amber RAG ratings but departments are confident that this can be pulled back in the final six months of the year.

24. Further work needs to take place to determine robust targets where there are gaps and also further discussions about target appropriateness where there are red target achievements. Many of these targets are 100% compliance by the end of the period and therefore will be showing red due to part delivery throughout the year.

Recommendations

25. Cabinet to note the update on progress against performance and delivery.

Links with the Corporate Priorities:

26. This report supplements the State of the Borough Outcomes Report in terms of providing further information on the contribution of the Council to the 2030 vision. The Corpoate Plan priorities are linked to the seven objectives of the LET'S vision.

Equality Impact and Considerations:

27. This report demonstrates the impact of our activity on the users of council services and the impact on the broader community.

Environmental Impact and Considerations:

28. There are no specific environmental consideration within this report however the data tracks progress towards our environmental commitments with the Council's Corporate Plan.

Assessment and Mitigation of Risk:

Risk / Opportunity	Mitigation
Lack of capacity to deliver again the Corporate Plan priorities which reduces our ability to achieve the LET'S Vision	Further attention will be given to the activities rated as Amber in order to ensure that resources are used to appropriately to support priorities however in some cases reprofiling may be required on a case by case basis.

Legal Implications:

29. There are no legal implications however the regular reporting of performance is part of the Council's approach to good governance,

Financial Implications:

30. This report is reporting on the delivery of performance against the Council priorities set out in the corporate plan. The Corporate Plan is reviewed and produced annually in line with the budget setting process and the budget is developed to deliver council priorities. There are no direct financial implications of this report as the budget to deliver the priorities was approved by Full Council in February 2023.

Appendices:
None.

Background papers:
None.

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

Term	Meaning
ALDP	Accelerated Land Disposal Programme
ASC	Adult Social Care
BAME	Black, Asian or Minority Ethnic
BHEAST	Bury Health Employment and Skills Team
BID	Business Improvement District
CLA	Children Looked After
CME & EHE	Children Missing Education & Elective Home Education
CPP	Child Protection Plan
CQC	Care Quality Commission

CVD	Cardiovascular Disease
DfE	Department for Education
DoLS	Deprivation of Liberty Safeguards
DSG	Dedicated Schools Grant
DWP	Department for Work and Pensions
EDI	Equality Diversity and Inclusion
EET	Education, Employment, or Training
EHCP	Education, Health and Care Plan
EHE/CME	Elective Home Education/Children Missing Education
FOI	Freedom of Information
H&S	Health & Safety
HSE	Health and Safety Executive
ICB	Integrated Care Board
IMC	Intermediate Care
JSNA	Joint Strategic Needs Assessment
KPI	Key Performance Indicator
MTFS	Medium Term Financial Strategy
NW	North West
PDR	Personal Development Review
PfE	Places for Everyone
PRU	Pupil Referral Unit
PSR	Public Service Reform
PSV	Project Safety Valve
SALT	Speech and Language Therapy
SEMH	Social Emotional and Mental Health
SENCO	Special Educational Needs Co-Ordinator
SEND	Special Educational Needs and Disabilities
SME	Small to Medium Enterprise
STH	Six Town Housing
TfGM	Transport for Greater Manchester
UKSPF	UK Shared Prosperity Fund
VCFA	Voluntary Community and Faith Alliance
VCSE	Voluntary, Community and Social Enterprise

Appendix One: 2023/24 Corporate Plan

Priority	Key Deliverables	April – June 23	July-Sept 23	Oct – Dec 23	Jan – March 24
Top Three Corporate Priorities for 2023/24		→→→ RESPONSE	→→→ RECOVERY	→→→ RENEWAL	→→→
1. **Supporting residents and businesses with the cost-of-living crisis**	Deliver 2023/24 Action Plan within the Anti-Poverty Strategy	• Household Support Round Three	• Cost of Living Sumit Three	• Winter support programme delivered	• Evaluation of impact
	Launch Social Value Policy / Community Wealth	• Mapping of existing commitment via contract register and procurement analysis	• Framework of opportunities signed-off via Neighbourhood teams	• Social Value Policy launched	• Evaluation framework agreed and implemented
2. **Improving Children's Lives**	**Childrens Social Care** Ensuring services for children and young people meet the required standards for good levels of safeguarding and support	• Family Safeguarding model implemented	• Early Years offer resolved • Exit of Manged Service Team	• 23 international social work arrivals • Implement training for EH practitioners. • Student Social Worker intake	• Preparation for Ofsted re-inspection by ensuring services are recognised as improving outcomes for our children and young people
	Educational Improvement Radcliffe School build commences Improve the proportion of schools good or better Academisation Strategy Improved attendance	• Develop school improvement and school cluster model with seconded headteacher • Develop training and communication for schools and governors following DfE local area commissioning statement	• DfE procurement – school build • Revise Quality Assurance proforma and mechanism • Analyse schools attainment data and RAG rate	• Radcliffe leisure centre relocated to enable new schools build phase to commence • Quality assurance visits to schools	• Radcliffe School build begins • PRU relocates to Spurr House
	Special Education Needs Preparing for the new review of services by Ofsted through service transformation Project Safety Valve Plan Updated and Approved by Department for Education	• SEND improvement plan updated • Graduated approach launched • Revised PSV Management Plan submitted	• Revised local offer in place • Under 5 plans reviewed • Circa 50 RP places open	• Options paper for 14-25 SEND service to be completed • Recommissioning of short break offer	• Unsworth special school open • Circa 10 RP places open
3. **Achieving Inclusive Economic Growth**	Levelling-Up Sites commence construction Township Plans for Whitefield, Prestwich and Ramsbottom Economic Development Strategy Updated Accelerated Growth Programme Skills Strategy	• Planning secured – Radcliffe & Bury sites • High St Taskforce to Whitefield • Prestwich consultation • OBC-Ramsbottom Enterprise centre • Radcliffe pocket park • EDS launch	• Radcliffe demolition • Market operator engaged • Whitefield town plan • Ramsbottom public realm planning • Millgate masterplan • Skills Strategy launched	• Radcliffe hub construction begins • Prestwich funding strategy • Planning – Radcliffe enterprise centre • Inclusive growth strategy launched	• Bury flexi construction begins
Other Organisational Priorities for 2023/24		→→→ RESPONSE	→→→ RECOVERY	→→→ RENEWAL	→→→
4. Improving the Health & Care System	Intermediate Care Transformation Plan	• Training needs analysis completed • Provider and service user Physical Disabilities network established • Assistive Tech team established and operational. • Implement new Housing Assistance Policy • Deliver contract between Council and GP Fed for payment for Staying Well service	• Stand-alone Bed Base and Home base service created by merging IMC@Home with Reablement • Assistive Tech delivery	• Assistive Tech delivery	• Review Intermediate Tier and assess requirements • Assistive Tech delivery
	Care Quality Commission Inspection Readiness	• Peer Challenge improvement plan prepared • Updated self-assessment completed • ASC performance Framework designed	• ASC performance framework implementation • 'Getting the call' readiness plan	• Potential assessment window	• Potential assessment window
5. Reducing Health Inequalities	Reducing the life expectancy gap by focusing on preventing and reducing the impact of the 3 key contributors CVD, Cancer and Liver Disease. Narrowing the school readiness gap.	• GP FED plan for the delivery of the secondary prevention CVD work in General Practice. • Refine the new Wellness Model of delivery to focus work on key priorities • Complete first version of the JSNA	• Update local smoking plan • Develop and roll out alcohol licensing matrix to support licensing decisions prevention CVD work in General Practice	• Review self-care information and Tools on the Bury Directory and refine as appropriate • Support the roll out of self-care comms through VCSE sector	• Review impact of additional substance misuse service investment
6. Tackling Climate Change	Deliver commitments to decarbonisation and household energy efficiency across the borough Launch internal climate change action plan	• Phase 2 - Replace 252 street lighting columns and LEDs • Phase 3 - Carry out design work/tenders for LED replacement	• Phase 2 - Replace a further 252 street lighting columns and LEDs • Phase 3 - Upgrade 300 streetlights with LEDs • Delivery of the remaining 13 electric vans to the Council fleet	• Phase 2 - Replace a further 252 street lighting columns and LEDs • Phase 3 - Upgrade a further 510 streetlights with LEDs	• Phase 2: Replace a further 252 street lighting columns and LEDs; Phase 3: Upgrade a further 510 streetlights • Increase public EV charging infrastructure by 100% • Implement Social Housing Decarbonisation (Wave 2) • Deliver energy efficiency measures to 80 households in Bury
7. Public Sector Reform	Embedding Public Sectors Leadership Teams in each neighbourhood	• Updated Neighbourhood profiles and SotB • Map models of risk stratification already in place - consistent and neighbourhood specific	• People & Community plans	• Review operation of neighbourhood teams	• Assess next steps for integration
	Taking a Person and Community Centred Approach to Public Sector reform	• Map models of strengths-based working and assess commonality of approach • Community Mental Health Hubs	• Develop framework for consistent and multiagency approach • Wellness strategy	• Pilot consistent place-based strengths-based approach • Bury East Family Hub open	• Radcliffe Family Hub open
8. Delivering sustainable Housing Growth	STH Options Appraisal Housing Development to deliver 700 new homes	• Decision to in-source • Start on site: Wheatfield (30)	• Tenant engagement • Improvement plan agreed • William Kemp Heaton (18 LD units) Willow St (13 physical, sensory/LD)	• Final decision made • Start on Site East Lance Papermill (400 homes) • Place for Everyone adopted (Elton)	• Readiness for regulator complete • Start on site: Green St (132); Seedfield (86); School St (91)
9. Celebrating culture and supporting our creative sector	Launch and Implementation of new Cultural Strategy Delivery of savings in BAM Development of programme of events UKSPF monitoring	• Launch event for Strategy • Identify and bid for funding opportunities including LIF 3, MEND and GMCA funding • Events Programme go live	• Develop plans for new Library in Prestwich • Develop plans to relocate library in Bury • Support plans for commercialisation of BAM • Options appraisal with Market Curators • Events Programme	• Appoint Flexihall provider • Approve BAM option • Events Programme	• Secure capital funding / MEND for BAM • Secure ACE funding to move Bury Library and Capital to refurbish • Events Programme

Appendix Two: Performance Indicators - Business Growth and Infrastructure

Measure	Benchmark		Previous		Current			Commentary
Total planning applications received	TBC	Local	Q4 2022/23	198	Q1 2023/24	206	↑	The previous 3 quarters have seen very similar figures – 201, 198 and 206
% of planning decisions granted	89%	GM	Q4 2022/23	91%	Q1 2023/24	88%	↓	The % of planning decisions granted fell below 90% for only the second time in 3 years (89% - Q3 2021)
Annual housing completions boroughwide	TBC	Local	Q4 2021/22	280	Q4 2022/23	210	↓	Annual housing completions fell by 25% on the previous quarter
Number of housing units completed in the borough which are affordable	TBC	Local	Q4 2021/22	145	Q4 2022/23	80	↓	Affordable housing completions also fell by nearly 45%
% housing completions on brownfield land boroughwide	TBC	Local	Q4 2021/22	88%	Q4 2022/23	92%	↑	Highest percentage of housing completions on brownfield land in the previous 4 years
Average waiting time on housing register (all applications) (snapshot)	TBC	Local	Aug-23	531	Sept-23	548	↑	Figure increased for 10th successive month
Number of rough sleepers currently being supported	35	Previous local target	Aug-23	72	Sept-23	72	↔	This figure has remained static for 3 months
Number of statutory homeless cases open on the last day of the month	560	Previous local target	Aug-23	793	Sept-23	799	↑	There was a significant drop in Q1 from 801 (March 23) to 724 (June 23), however the figure continually increased throughout Q2, almost reaching the same figure as March 2023
Number of households in temporary accommodation on last day of the month	65	Previous local target	Aug-23	121	Sept-23	126	↑	This figure has steadily risen since 2022 and hasn't been below the target of 65 since August 2021

% of move-ons from homelessness/threat of homelessness into permanent accommodation	50%	Previous local target	Aug-23	51%	Sept-23	34%	↓	September figure of 34% was the lowest since Jan '23

Performance Indicators – Children and Young People

Measure	Benchmark		Previous		Current			Commentary
The % of pupils attending a good or better Primary School in Bury	93.7%	NW	Jun-23	92.7%	Sept-23	90.9%	↓	June's figure of 92.7% was significantly higher than average for Bury and fell by 1.8% to 90.7% in September 2023
The % of pupils attending a good or better Secondary School in Bury	74.8%	NW	Jun-23	65.6%	Sept-23	65.7%	↑	There was a slight increase of 0.1% on June's 65.6%, keeping Bury below the North West average of 74.8%
The % of pupils attending a good or better School in Bury	86%	NW	Jun-23	81.6%	Sept-23	80.6%	↓	Bury's overall average fell by 1% and remailed 5.4% below the North West average
% of Pupils with an EHCP	4.29%	ENG	Jan-23	4.9%	May-23	5.1%	↑	As we know demand for EHCPs is increasing following the pandemic. This unprecedented demand is reflected here
Number of school aged children with an EHCP	TBC	Local	Jan-23	1448	May-23	1514	↑	The number of EHCPs continues to rise as new EHCPs are issued
EHCP: Percent of Plans issued on time, compliance at 20 weeks	100%	Local	Aug-23	84%	Sept-23	73%	↓	This has dropped by 11% from the previous month, but remains more than 20% above the England average for 2022
Rate of School Permanent Exclusions	0.11	NW	May-23	0.12	Jun-23	0.14	↑	This is the final end of term figure and is a cumulative total for the school year
Rate of School Suspensions	7.12	NW	May-23	7.54	Jun-23	9.4	↑	This is the final end of term figure and is a cumulative total for the school year. Bury's rate was significantly higher than other areas of the North West

Elective Home Education (EHE)	TBC	Local	May-23	258	Jun-23	256	↓	There will always be a cohort of children who are electively home educated and we need to ensure that they are supported
Rate of CLA per 10,000 children (latest snapshot)	70	ENG	Jul-23	80	Aug-23	81	↑	Whilst remaining static over recent months and higher than the England average, Bury remains lower than the average for similar local authorities
Rate of CPP per 10,000 children aged 0-17 (latest)	42.1	ENG	Jul-23	56	Aug-23	53	↓	Slightly declining over recent months still higher than the England average
Rate of open CIN per 10,000 children aged 0-17 (latest)	334	ENG	Jul-23	280	Aug-23	303	↑	The figure has risen in recent months but remains beneath the England average
Rate of referrals per 10,000 children aged 0-17 over the last 6 months	537.7	ENG	Jul-23	676	Aug-23	484	↓	Rate has returned towards the national average during 2023, despite a sharp increase in July
Re-referrals: children with a previous referral within 12 months of their latest referral (last 6 months)	22%	ENG	Jul-23	25%	Aug-23	33%	↑	Rate remains markedly above national average
Re-registrations for children who started on a CP plan (ever) (last 6 months)	23%	ENG	May-23	12%	Jun-23	21%	↑	Rate is moving towards national average
Education, Employment, or Training (EET) of 16-17 year olds (%)	94.7%	ENG	Jun-23	95.3%	Jul-23	94.3%	↓	Our 16–17-year-olds have fallen slightly below the national average and although a lower percentage, we have a higher percentage of 19-21 year olds in EET
Education, Employment, or Training (EET) of 17-18 year olds (care leavers)	64%	ENG	Jul-23	42%	Aug-23	43%	↑	
Education, Employment, or Training (EET) of 19-21 year olds (care leavers)	41%	ENG	Jul-23	42%	Aug-23	49%	↑	
% of children accessing 2 year take up of free childcare	74%	ENG	Apr-22	68.5%	Jul-23	69.9%	↑	This figure has increased for the first time in 3 previous

								quarters, falling from 79% in April 2022
% of children defined as ready for school	67.3% (prov)	ENG	Apr-23	63%	Aug-23	65.7%	↑	Whilst there has been a slight overall improvement we know the inequality gap here for FSM has widened and we are still below England average
% of Early Help assessments by Partners	TBC	Local	Jun-23	67%	Aug-23	51%	↓	The percentage of Early Help assessments completed by Partners fell to 51% in August 2023
Average Progress 8 score at GCSE	-0.16	NW	N/A	N/A	2022	-0.28		A negative score does not mean there was no progress but rather that pupils made less progress. A score of zero means that pupils progressed at rate in line with the average across the country
Number of children in residential care homes	25	Local	May-23	23	Jun-23	24	↑	The number of children in residential care rose during the first quarter of 2023/24, with several children entering care and swiftly entering residential care

Performance Indicators – Health & Adult Care

Measure	Benchmark		Previous		Current			Commentary
Referral to treatment total waiting list entries		Local Target under Review	Jun-23	32158	Jul-23	31427	↓	Target needs reframing in line with current activity
Referral to treatment total number waiting in excess of 52 weeks		Local Target under Review	Jun-23	2601	Jul-23	2627	↑	
IAPT waiting times % 6 weeks or less from referral	75%	Previous local target	May-23	91.5%	Jun-23	87.4%	↓	Achieving target but a decline in performance in the last month.
Patients in Fairfield General Hospital with No Right to Reside on the last day of the month			Aug-23	77	Sept-23	61	↓	An indication of how well we are transferring patients from hospital out into community or other care.
IMC (Killelea) Bed Occupancy (%)			Aug-23	73%	Sept-23	89%	↑	IMC bed occupancy rose by 16% compared to the previous month
Residential and Nursing Care Bed Occupancy (%)			Aug-23	85%	Sept-23	85%	↔	No change in performance
Number of referrals to Adult Social Care (ASC)			Aug-23	211	Sept-23	227	↑	
Proportion of completed Adult Social Care (ASC) annual reviews in a rolling 12 month period			Aug-23	53.1%	Sept-23	51.4%	↓	
Percentage of 10/11-year olds who are a healthy weight	59.6 60.8	NW ENG	Q4 2021/22	59.6%	Q4 2022/23	60.4%	↑	Performance in increasing to get to near pre COVID levels. Target to be agreed
Under 75 mortality rate from cardiovascular diseases considered preventable	37 30.2	NW ENG	Q4 2020/21	31.3	Q4 2021/22	35.5	↑	2021/22 is the latest figure available.
Number of new referrals received by Live Well Service			May-23	237	Jun-23	232	↓	

Open safeguarding enquiries			Aug-23	231	Sep-23	251	↑	Despite a rise of 20, the figure of 251 is largely consistent with the average in Bury across the previous 8 months
The percentage of adult social care providers rated good or outstanding by CQC			Jul-23	82%	Aug-23	82%	↔	Performance maintained

Performance Indicators - Operations

Measure	Benchmark		Previous		Current			Commentary
% of physically active adults	65.2% 67.3%	NW ENG	Q4 2020/21	63.6%	Q4 2021/22	70%	↑	Exceeding both NW and England targets and an improvement on the last quarter.
% of physically active children and young people	48.5 47.2	NW ENG	Q4 2020/21	39.3	Q4 2021/22	38.1	↓	In contradiction to our adults, the % of children who are physically active is declining and well below both NW and England targets.
Number of air quality monitoring stations breaching nitrogen dioxide targets	0	Local	Q4 2021/22	1	Q4 2022/23	1	↔	1 station has breached target.
Total CO2 emissions produced within our borough	1118.1 1018	GM NW	Q4 2021/22	764.7	Q4 2022/23	877.9	↑	An increase in emissions in the last year. Need to confirm target as rate.
Total CO2 emissions resulting from council operations	NA		Q4 2020/21	13715	Q4 2021/22	11007	↓	Decrease in emissions resulting from Council operations in the last year.
% of council vehicles changed to lower emission versions	100	Local	Aug-23	76	Sept-23	76	↔	Significant increase from Q1 (52%).
Number of potholes reported	NA		Aug-23	106	Sept-23	57	↓	Lowest figure reported in the last 12 months.
Number of potholes repaired	NA		Aug-23	1026	Sept-23	327	↓	Lowest figure reported in the last 12 months.
Highway repairs completed on time (%)	100%		Aug-23	68%	Sept-23	73%	↑	Performance has increased but not enough to meet target.
Number of EV Charge Points	NA		Q1 2023/24	29	Q2 2023/24	28	↓	Figure has dropped for Q2 although usually steadily increases.

% of street lighting converted to LED	NA		Q1 2023/24	68.05%	Q2 2023/24	69%	↑	Only a slight increase after 7% increase the quarter prior.
Waste collection (tonnes)	tbc		Aug-23	5533.46	Sept-23	4,993.62	↓	
Waste collection: grey bins (tonnes)	tbc		Aug-23	2509.6	Sept-23	2,192.78	↓	
Waste collection: blue bins (tonnes)	tbc		Aug-23	807.68	Sept-23	709.5	↓	
Waste collection: green bins (tonnes)	tbc		Aug-23	505.6	Sept-23	551.84	↑	
Number of missed bin collections per 100,000	tbc		Aug-23	130	Sept-23	132	↑	Missed bins have increased by nearly double since September 2022 (67).
Proportion of household waste recycled	41.9	ENG	Aug-23	56.1	Sept-23	57.22	↑	Proportion increased slightly this month and remains well above England Average.
The amount (tonnes) of residual household waste per household	tbc		Q3 2022/23	84.32	Q4 2022/23	89.03	↑	
Waste collection (tonnes) from street cleaning	tbc		Aug-23	207	Sept-23	183	↑	
Number of Fixed Penalty Notices (FPNs) issued for littering	NA		Aug-23	2	Sept-23	2	↔	Target and polarity to be considered.
Number of Fixed Penalty Notices (FPNs) issued for fly tipping	NA		Aug-23	6	Sept-23	1	↓	Target and polarity to be considered.
Number of new unauthorised traveller encampments on public land	NA		Aug-23	0	Sept-23	0	↔	Target and polarity to be considered.
Number of council buildings with carbon reduction measures introduced	NA		Aug-23	7	Sept-23	7	↔	

Average time taken to repair street lighting	NA		Aug-23	6.6	Sept-23	6.3	↓	
Number of green flag parks	NA		May-23	14	Jun-23	14	↔	
% of lettings occupied on Bury Market (Market Parade)	NA		Jul-23	78%	Aug-23	77%	↓	
% of lettings occupied on Bury Market (Open Market)	NA		Jul-23	94%	Aug-23	96%	↑	Figure increased by 2%.

Performance Indicators – Corporate Core

Measure	Benchmark		Previous		Current			Commentary
Number of births registered	TBC	Local	Aug-23	151	Sept-23	98	↓	Figure is considerably lower than previous months and the same period 12 months ago
Number of deaths registered	TBC	Local	Aug-23	174	Sept-23	160	↓	Figure is the same as last year in September - 160
Contact centre – number of contacts answered	24,000	Previous local target	Jun-23	20384	Jul-23	15211	↑	Less calls
Contact Centre - Council Tax - % of all calls answered	85	Previous local target	Jun-23	76	Jul-23	87	↑	
Contact Centre - Operational and Environmental Services - % of all calls answered	85	Previous local target	Jun-23	85	Jul-23	84	↓	
Number of customers with a One Account	30,000	Local	Jun-23	12,186	Jul-23	15425	↑	Figure is now over half way to the target of 30,000
Total number of VCFA volunteers (cumulative)	TBC	Local	Dec-22	680	Jan-23	691	↑	
Sickness absence: average number of days lost per FTE per year (Bury Council)	9.85	Previous local target	Aug-23	13.73	Sept-23	14.07	↑	
% Staff turnover (Bury Council)	8.5	Previous local target	Aug-23	12.07	Sept-23	12.47	↑	
% of FOIs completed on time (Bury Council)	100	Previous local target	Aug-23	96%	Sept-23	100%	↑	
Number of SARs overdue (Bury Council)	0	Previous local target	Aug-23	8	Sept-23	16	↑	

% annual PDRs completed in previous 12 months (Bury Council)	100	Previous local target	Aug-23	52.6	Sept-23	53.2	↑	Continual increase in September, reaching the highest percentage since March 2023 (53.4%)
% of corporate complaints responded to within timescale (Bury Council)	100	Previous local target	Jun-23	82%	Jul-23	96%	↑	Figure has risen by 14% from August, however still slightly below the 100% target
Agency Spend via Reed £	TBC	Local	Jun-23	£777,727	Jul-23	£614,278	↓	
Percentage of staff in scope who've completed mandatory training module: GDPR (in past 12 months)	95	Previous local target	Aug-23	76.8	Sept-23	78.4	↑	
Number of data breaches	0	Local	Jul-23	13	Aug-23	13	↔	
Average number of days to respond to councillor member queries (snapshot)	10	Previous local target	Aug-23	11.9	Sept-23	12.4	↓	

Performance Indicators – Finance

Measure	Benchmark		Previous		Current			Commentary
% error rate - Payroll	99	Previous local target	Aug-23	99.31	Sept-23	99.26	↓	Still on target – only a slight decline in performance this month.
% of invoices paid within 30 days (Council)	95	Previous local target	Jul-23	99.54	Aug-23	99.40	↓	On target with a slight decrease in performance this month.
% Council Tax collected	96.41 cumulative	Previous local target	Aug-23	43.84	Sept-23	52.44	↑	Figure is slightly better than last years' September figure of 52.35
% Business rates collected	94.85 cumulative	Previous local target	Aug-23	41.21	Sept-23	51.63	↑	Figure is lower than the same time last year, where September's figure was 54.58
% of sundry debt collected within 30 days	NA		Aug-23	24.87	Sept-23	24.06	↓	Sundry debt collected within 30 days fell slightly in September, however was as low as 13% in July.
Total debt outstanding (customer accounts) after 30 days	NA		Aug-23	£16,946,914	Sept-23	£17,356,467	↑	The total debt outstanding rose for the third consecutive month
Days taken to process benefits - new claims	NA		Aug-23	28.87	Sept-23	40.79	↑	Days taken to process benefits – new claims – rose sharply in September to 40.79
Days taken to process benefits change in circumstances	NA		Aug-23	4.31	Sept-23	3.88	↓	Days taken to process benefits change in circumstances fell from a high of 5.8in July to 3.88 days in September

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Agenda Item 7

Classification:	Decision Type:
Open	Non-Key

Report to:	Overview & Scrutiny Committee Cabinet	**Date:** 07 November 2023
Subject:	Quarter 2 Budget Monitoring Report	
Report of	Cabinet Member for Finance and Communities	

Summary

1. This report outlines the forecast financial position of the Council at Quarter two 2023/24 based on the information known at 30 September 2023. This report also provides an update on the work to mitigate and reduce the overspends and how this will be managed throughout the remainder of this financial year. The report sets out the position for both revenue and capital and provides an analysis of the variances, both under and overspending.

   The report also provides the mid-year treasury management report and recommends business rate accounts for write off.

Recommendation(s)

2. The Cabinet is asked to:

   a. note the delivery of savings to date of £12.849m with a forecast savings delivery of £18.888m within the challenging context of increased demand and inflationary cost increases.

   b. note the forecast overspend of £9.749m within the revenue budgets at Quarter two and the recovery action proposed.

   c. note the re-phasing of the capital budget.

   d. note the deficit on the Dedicated Schools Grant and the ongoing activity within the Project Safety Valve project.

   e. Note the mid-year treasury management report for onward approval by Council of the refreshed prudential indicators and updated Approved Lending List Criteria.

   f. Approve the write off of the business rate accounts included in Appendix 4

Reasons for recommendation(s)

3. To update Members on the Councils budgetary position and ensure the Council's budgetary targets are achieved.
4. This report is in accordance with the Council's financial procedure regulations.

Alternative options considered and rejected

5. None

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Background

6. This report outlines the forecast financial position of the Council at the end of 2023/24 financial year based on the information known at the end of the second quarter. The report also reports on the mid-Year Treasury Management position and a number of business rate accounts which require write off.

   The report sets out the position for both revenue and capital budgets and presents a current revenue forecast overspend of £9.749m. The details by department and the programme of action to address this are included in Appendix 1. This is a much improved position from that which was reported at quarter one when the forecast overspend at the end of the year was projected to be £13.266m

   Any remaining unmitigated overspend at the year-end will impact upon the available reserves. The Council had £22.7m in its General Fund usable reserves as at 31st March 2023.

   Over the summer a lot of work has been undertaken in preparation for refreshing the Councils medium term financial plan and developing detailed budgets for 2024/25. This has included an in depth analysis of current budgets and in year spend, which has improved budget holders and finance business partners understanding of cost drivers and where there may be budgets that can be reallocated or removed.

   The Council implemented a moratorium on spend at the end of July due to the financial position and this has in part supported the improvement in the quarter 2 position however, there remains significant pressures. The Council has also implemented a process of monthly departmental budget challenge sessions where departmental management teams are asked how they will mitigate any in year pressures, discuss progress on delivery of 23/4 savings programmes

and identify if any of the 24/5 approved savings programmes can be brought forward in order to support the Councils' overall financial position. These will continue as a minimum until the end of this financial year.

Forecast Outturn against Budget 2023/24

7. The projected forecast outturn position is reporting significant variances within Children and Young People which is reporting £10.085m at quarter two an increase on the quarter one position by £0.724m. The increase is due to Social Care and Safeguarding residential placements as a result of an increase in the number of placements and their complexity. In addition, the service still has a high number of agency staff employed.

8. Education and Inclusion is also reporting significant pressure of £4.096m, which includes costs previously funded through DSG which following a review last year end have been transferred to the general fund. The Inclusion and Partnerships budget is forecasting to overspend by £1.275m, with short breaks and personal budgets being a significant proportion of the overspend.

9. The dedicated schools grant (DSG) is forecasting a deficit position of £18.555m by the end of this financial year. This deficit is reported within the statement of accounts as a deficit reserve funded through the Councils cash balances. The Council have been in regular discussions with the Department for Education (DfE) regarding its deficit position. A revised plan has been submitted for consideration by Ministers. This plan sees the eradication of the DSG deficit by the financial year 2028/29 and includes the use of £6m of Council reserves as approved by Cabinet in July.

10. Adult social care are reporting an overspend of £1.145m and this is predominantly due to an increase in demand for Home Care packages as a result of supporting hospital discharges into home care settings, additional 'in year demand' demand or increases to existing care packages and legacy demand pressures because of the Covid Hospital Discharge policy. The forecast position has improved on quarter one however there is a risk that over the winter additional demand may result in a further increase in the overspend. Winter pressures will be kept under constant review across the full health and care system to assess performance and financial impact on all system partners.

11. The operations budget is forecasting £1.593m a reduction of £1.100m from quarter one however there are significant pressures experienced across the service of which further details are in appendix 1.

12. The budget to fund the financing of the capital programme is within the non-service specific budget which is reporting an underspend of £3.2m largely due to the re-phasing of the capital programme and additional income from investments.

13. The Council has a savings target of £22.350m to deliver this financial year. To date £12.849m has been delivered and at the end of quarter two with

£18.888m forecasted delivery for the full year, resulting in a shortfall of £3.462m. Work is ongoing to increase delivery and this will be reported in future Cabinet reports. A number of options are being scoped by departments that will provide in year mitigations. The Council is also developing a strategic asset development plan which will rationalise the Councils estate which should deliver against the current transformation flexibly programme.

Capital Programme

14. The capital programme has been updated to re-phase schemes into future years. This has resulted in a reduction in the overall 2023/24 Capital Programme by £67.035m, from £144.588m to £77.553m and the savings in the revenue have been reflected in the revenue outturn position.

Treasury Management – Mid –Year Report

15**.** Treasury Management summary at the mid-year point, the key messages in the report are that:

- All treasury management activities were executed by authorised officers within the parameters agreed by the Council.
- The Approved Lending List Criteria has been updated for approval.
- £2.9m of temporary borrowing was raised during the quarter to 30 September 2023 and overall borrowing is £219.4m at 30 September 2023.
- As a result of the re-profiling of the Capital Programme during the quarter to 30 September 2023:
  - The 2023/24 in-year Financing Requirement is £19.310m.
  - The 2023/24 overall Capital Financing Requirement is £363.828m.
  - The 2023/24 Operational Boundary is £363.838m.
  - The 2023/24 Authorised Limit is £373.838m.
- The average investment return on short-term investments at 30 September is 4.72%.
- The council currently holds no direct investments with overseas financial institutions.
- The HRA debt is managed separately from General Fund debt.

Accounts for Write off

16**.** Members will be aware that during the pandemic all Councils were unable to pursue any recovery action through the courts or external enforcement agents and as a consequence following the pandemic there was an increase in the volume and value of debt and the number of businesses who became non-payers. This cessation of debt collection by creditors along with the mid and post pandemic economic downturn, is also likely to have led to a delay and an increase in the number of businesses applying for bankruptcy or going through insolvency procedures.

Debts in excess of £50k require approval of Cabinet for write off there are 12 debts totalling £850,736.60 that require write off. Ten of these companies are in liquidation/bankruptcy or insolvent and 2 are deemed not viable to collect.

Due to the age of this debt all of it is fully provided for within the bad debt provision and therefore there is no impact on the in year position.

Improvement measures are currently being implemented within the service which will support more expedient and efficient collection and recovery processes, helping to mitigate against aged debts being rendered uncollectible due to subsequent insolvency of the business. This is in parallel with the new pathway that seeks to ensure all businesses are claiming all grants and subsidies that they are entitled to thereby reducing their liability.

Conclusion

17. The financial position remains very challenging but there has been a positive improvement of £3.517m in the forecast between quarters one and two. Officers are working hard to mitigate in year overspends and to reduce the current forecast reported as at the end of quarter two.

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.

Environmental Impact and Considerations:

N/A

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
The Council has insufficient funds to support its expenditure.	Regular reporting and tight budgetary control by budget holders support the Council in managing the overall financial risks and financial planning for the Council. In July the Council implemented a moratorium on expenditure to reduce the forecast overspend. Departmental management teams are now receiving improved monthly financial management information to help them to control their budgets and make informed decisions

Legal Implications:

Treasury management is a matter reserved for Council. This report updates Cabinet in line with the Council's financial regulations and constitution.

Financial Implications:

The financial implications are set out in this report.

Appendices:

Appendix 1 Detail by Department of current year position

Appendix 2 Capital Programme

Appendix 3 Mid-Year Treasury Management Report

Appendix 4 Accounts for write off

Background papers:

None.

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

Term	Meaning

Appendix 1

Quarter 2 Revenue Budget Monitoring Report

Executive Summary

The forecast financial position of the Council at the end of 2023/24 financial year based on the information known at the end of the second quarter is a current overspend of £9.796m. Any remaining unmitigated overspend at the year-end will impact upon the available reserves. The Council had £22.7m in its General Fund usable reserves as at 31st March 2023.

Table 1 – Forecast Outturn against Budget 2023/24

Appendix A	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	£m	£m	£m
Business, Growth and Infrastructure	0.714	0.796	**0.082**	**0.040**	**0.042**
Children and Young People	39.377	49.463	**10.085**	**9.361**	**0.724**
Corporate Core Services	15.101	15.134	**0.033**	**0.166***	**(0.133)**
Corporate Core Finance	8.825	8.836	**0.011**	**0.001**	**0.010**
Housing General Fund	(0.079)	(0.079)	**0.000**	**0.000**	**0.000**
Non-Service Specific	34.066	30.866	**(3.200)**	**(2.257)**	**(0.943)**
Health and Adult Care (formerly OCO)	78.261	79.406	**1.145**	**3.216**	**(2.071)**
Operations	14.009	15.649	**1.640**	**2.740***	**(1.100)**
Total forecast over / (under) spend	190.274	200.071	**9.796**	**13.266**	**(3.471)**

*adjusted for movement of Art Galleries and Museums from Corporate Core Services to Operations.

Business, Growth, and Infrastructure - £0.082m adverse variance

Business, Growth and Infrastructure	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter
	£m	£m	£m	£m	£m
BGI Central Budget (Fees & Charges Savings)	(0.244)	0.000	0.244	0.000	0.244
Strategy, Planning & Regulation	0.471	0.464	(0.007)	0.090	(0.097)
Land & Property	(1.421)	(1.454)	(0.033)	0.000	(0.033)
Regeneration Delivery – Major Projects	0.020	0.019	(0.001)	0.000	(0.001)
Regeneration Delivery – Economic Regeneration	0.597	0.550	(0.047)	0.000	(0.047)
Housing Needs & Options	0.451	0.494	0.043	(0.030)	0.073
Strategic Housing	0.132	0.081	(0.051)	0.000	(0.051)
Urban Renewal & Adaptations	0.123	0.126	0.003	0.000	0.003
BGI Management Team	0.602	0.533	(0.069)	(0.020)	(0.049)
Total forecast over / (under) spend	0.731	0.813	**0.082**	**0.040**	**0.042**

Business, Growth, and Infrastructure - Financial Headlines

The forecast overspend is an overall overspend of £0.082m. Included within the revenue budgets are savings targets of £0.750m of which £0.700m has been achieved on a permanent basis and £0.050m remains to be achieved. The underachieved £0.050m will be reviewed as part of the ongoing process to reduce the overall overspend position to bring the budget into balance by the end of the financial year.

Children and Young People - £10.085m adverse variance

Children and Young People	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	£m	£m	£m
Children's Commissioning	0.370	0.414	**0.044**	**0.035**	**0.009**
Early Help & School Readiness	4.289	3.536	**(0.753)**	**(0.319)**	**(0.434)**
Children's Services Management and other costs	(0.094)	0.291	**0.385**	**0.000**	**0.385**
Education and Inclusion	9.445	13.542	**4.096**	**4.308**	**(0.212)**
Social Care and Safeguarding	25.367	31.680	**6.313**	**5,337**	**0.976**
Total forecast over / (under) spend	39.377	49.463	**10.085**	**9.361**	**0.724**

Children and Young People - Financial Headlines

The Children and Young People department is forecasting to overspend by £10.085m as at Quarter 2 (£9.361m at Quarter 1) with a £6.313m forecast overspend on Social Care and Safeguarding and a £4.096m forecast adverse variance across Education and Inclusion. There are a number of budget headings over and under spending across the service, however the most significant variances are set out in the paragraphs below.

A review of the Dedicated Schools Grant (DSG) was carried out earlier in the calendar year which resulted in the requirement to transfer £2.5m of expenditure across several services back to the general fund. Due to the timing of this review, it was not possible to include this pressure in the budget approved by full Council in February 2023 which has resulted in the ongoing expenditure contributing to the overall departmental overspend. The service is continuing to review the services transferred to seek alternative delivery methods to mitigate pressures in the current year and reduce the impact on the medium-term financial plan for 2024/25 onwards.

The 2023/24 CYP saving programme is £0.707m and has delivered £0.507m (72%) of savings as at month 6. A budget reduction of £0.200m for Short Breaks and Personal Budgets has been identified as Red and unachievable. There also remains £0.200m of undelivered savings relating to 2022/23 savings programmes. As at month 6, the saving for external placements (£0.200m) is considered to be unachievable.

Social Care and Safeguarding – £6.313m forecast adverse variance.

The residential placements budget for children including those with a disability is projected to overspend by £4.089m at Quarter 2 (£3.177m at Quarter 1) due to the current number of children in residential placements and their complexity.

The service is continuing to experience a high demand for Children's placements which is comparable with neighboring authorities. The service has set up a weekly panel to ensure that children can return to a more family orientated home environment where appropriate. In addition to an increase in the number and cost of residential homes the service continues to incur high costs associated with high numbers of agency social workers in common with many other Local Authorities, both regionally and nationally.

The safeguarding service is forecast to overspend at Quarter 2 by £1.915m (£1.534m at Quarter 1) of which £1.051m relates to the safeguarding fieldwork team and increased costs for Non-Looked After Children's support packages and homelessness alongside additional legal costs.

The service is currently implementing a large recruitment exercise to recruit permanent social workers and reduce the cost of agency staff. The service also continues to invest in its social worker academy which will result in more locally qualified social workers.

Education and Inclusion - £4.096m forecast adverse variance.

Home to School Transport is reporting a forecast overspend of £1.868m at Quarter 2 (£1.817m at Quarter 1). There has been an increase in demand for this service alongside inflationary costs which have also contributed to this adverse variance. The service is currently reviewing this service to identify how this can be delivered more efficiently to reduce costs.

School crossing patrols are expecting to overspend by £0.280m (£0.324m at Quarter 1) and a review is currently underway to look at alternative provision to deliver this service.

The Educational Psychology service is forecasting an adverse variance of £0.376m at Quarter 2 (£0.427m at Quarter 1). Included within the work as part of the Council's budget setting process for 2024/25, a review of the structure of the service has been completed with additional resource requirements included within the Council's Medium Term Financial Plan.

A review of the DSG expenditure during January to March 2023 resulted in the transfer of costs of the Curriculum Language and Access Service to the general fund. This service was ceased on 31 August 2023 with the majority of costs for the period April to August being offset by vacancies held across Education & Inclusion.

The Inclusion and Partnerships budget is forecast to overspend by £1.275m (£1.095m at Quarter 1). The Short Breaks service is the largest contributing area to this adverse variance at £1.272m which in part is due to the unachievement of a

previously approved savings target of £0.200m and short breaks costs of £0.300m previously funded through DSG. An increase in demand and costs for Personal budgets is also contributing to the overall overspend within Education and Inclusion.

The pressures across Social Care & Safeguarding and Education and Inclusion are being partially offset by a favourable variance of £0.753m in Early Help and School Readiness which is a result of several vacancies being held across the service area.

Children's Services Dedicated Schools Grant - £18.555m projected deficit

The dedicated schools grant has been overspending and projected to have a deficit of £18.555m by the end of this financial year. The Council have been in regular discussions with the Department for Education (DfE) about its deficit projections and in April 2023 was asked to complete a DSG Management Plan for submission to the Department for review by Ministers. A revised plan was and supplementary information was submitted on 13 October 2023 for consideration by Ministers. This plan sees the eradication of the DSG deficit by the financial year 2028/29 and includes the use of £6m of Council reserves as approved by Cabinet in July.

Corporate Core Services - £0.033m overspend

Corporate Core Services	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	£m	£m	£m
Legal and Democratic Services	4.274	4376	**0.102**	**0.095**	**0.007**
Chief Information Officer	4.941	4.852	**(0.089)**	**0.071***	**(0.160)**
People and Inclusion	4.429	4.388	**(0.041)**	**0.000**	**(0.041)**
Communications and Engagement	1.235	1304	**0.069**	**0.000**	**0.069**
Senior Management	0.222	0.215	**(0.007)**	**0.000**	**(0.007)**
Total forecast over / (under) spend	15.101	15.134	**0.033**	**0.166**	**(0.132)**

*adjusted for movement of Art Galleries and Museums from Corporate Core Services to Operations.

Corporate Core Services financial headlines

The Corporate Core Services budget is forecast to overspend by £0.033m at quarter 2, an improvement of £0.132m from the position at quarter 1. Included within the budget is a saving target of £0.591m of which £0.026m remains to be achieved.

Legal and Democratic

Legal and Democratic services is overspending by £0.102m which is due to the net increase in the cost of staffing and agency of £0.183m and an overspend on Coroners Court costs of £0.079m, offset by additional forecast income and an underspend in relation to Members Allowances of £0.088m.

The Chief Information Officer

The Chief Information Officer service has an overall underspend of £0.089m. This includes a one off overspend within ICT of £0.236m in relation to the costs of migration to cloud based services. This is offset with underspends within Strategic Partnerships and Performance and Intelligence services in relation to reductions due to the moratorium on expenditure, (£0.155m), reduced staffing costs, (£0.086m) and additional income (£0.033m).

People and Inclusion

The People and Inclusion service has an overall underspend of £0.041m.

Communications and Engagement

The Communications and Engagement service is forecast to overspend by £0.069m which is due to a partial underachievement of the savings target in relation to a service review and underachievement of the vacancy factor savings.

Included within the overall overspend is a saving of £0.026m yet to be achieved which relates to a service review which will be achieved in full during 2024/25. The service is reviewing budgets to mitigate the savings in the current financial year.

Corporate Core Finance - £0.011m overspend

Corporate Core Finance	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	£m	£m	£m
Corporate Core Finance	0.000	0.000	**0.000**	**0.000**	**0.000**
Deputy Director of Finance	4.967	4.908	**(0.059)**	**(0.069)**	**0.010**
Executive Director of Finance	3.858	3.927	**0.069**	**0.070**	**(0.01)**
Total forecast over / (under) spend	8.825	8.836	**0.011**	**0.001**	**(0.010)**

Corporate Core Finance

The overspend in finance is as a consequence of bringing in additional resources over and above establishment to support the finance improvement agenda and additional work to support with children's services.

Housing General Fund - £0.079m variance.

Housing General Fund	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	£m	£m	£m
Housing General Fund	(0.079)	(0.079)	**0.000**	**0.000**	**0.000**
Total forecast over / (under) spend	(0.079)	(0.079)	**0.000**	**0.000**	**0.000**

The Housing general fund

The housing general fund budget funds housing benefit payments to claimants.

Non-Service Specific - £3.200m favorable variance

Non-Service Specific	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	£m	£m	£m
Car Lease Salary Sacrifice Scheme	(0.025)	(0.025)	**0.000**	**0.000**	**0.000**
Chief Executive	0.212	0.173	**(0.039)**	**(0.043)**	**0.004**
Corporate Management	0.737	0.656	**(0.081)**	**(0.058)**	**(0.023)**
Cost of Borrowing	5.487	1.926	**(3.561)**	**(4.058)**	**0.498**
Environment Agency	0.100	0.111	**0.011**	**0.011**	**0.000**
GMWDA Levy	12.551	12.551	**0.000**	**0.000**	**0.000**

Passenger Transport Levy	13.403	13.403	**0.000**	**0.000**	**0.000**
Town of Culture	0.090	0.090	**0.000**	**0.000**	**0.000**
Townside Fields	(0.058)	(0.058)	**0.000**	**0.000**	**0.000**
Provisions/Reserves	1.569	2.039	**0.469**	**1.891**	**(1.422)**
Total forecast over / (under) spend	34.066	30.866	**(3.200)**	**(2.257)**	**(0.943)**

Non-Service Specific financial headlines

The Non-Service Specific (NSS) budget variance has increased from a £2.257m underspend at Quarter 1 to a £3.200m underspend at Quarter 2. Included within NSS is a cross cutting transformation budget saving of £2.921m of which £1.469m is currently reporting to be unachieved by the year end.

Corporate Management £0.081m favourable
Corporate management is forecast to underspend by £0.081m due to a number of variances relating to professional fees, subscriptions and initiatives.

Cost of Borrowing

A review of the Capital Programmes has taken place and projects to the value of £80.891m have been re-phased into future years resulting in a reduction in the amount of borrowing required by £40.440m in the current financial year to fund projects. In addition, investments have generated an additional £0.250m over budget due to better interest rates being received.

Provisions/Reserves £0.469m

There are a number of centrally held savings included within provision and reserves. There is a forecast underachievement of savings of £1.469m £1m of this has been mitigated by budgets that are not needed in this financial year.

Work is currently being undertaken to progress schemes where possible and identify mitigations for those savings that are unable to be achieved.

Health and Adult Care (formerly OCO) - £1.145m Overspend

Appendix A	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	£m	£m	£m
Adult Social Care Operations	6.566	6.309	**(0.257)**	(0.342)	0.085
Care in the Community	46.998	48.593	**1.595**	2.312	(0.716)
Commissioning and Procurement	15.295	15.295	**0.000**	1.276	(1.276)
Departmental Support Services	(0.845)	(0.859)	**(0.014)**	(0.002)	(0.012)
Workforce Modernisation	0.078	0.078	**0.000**	0.000	0.000
Public Health	10.169	9.990	**(0.180)**	(0.028)	(0.151)
Total forecast over / (under) spend	78.261	79.406	**1.145**	3.216	(2.070)

Financial Position

The Health and Adult Care (HAC) budget is forecast to overspend by £1.145m at quarter 2 which is a £2.070m improvement on the position reported at quarter 1. Included within the budget is a savings target of £9.307m, 11.9% of net budget which is made up of £7.761m for 2023/24 and £1.546m from prior years savings brought forward of which £0.334m remains to be achieved. The service is actively working to mitigate the savings through negotiations and reviews of care packages.

Adult Social Care Operations - £0.257m underspend

The Adult Social Care Operations budget is forecast to underspend by £0.257m, which is a £0.085m decrease on the underspend reported at quarter 1. The decrease is due to revised staffing forecasts within Assessment and Care Management and Integrated Neighbourhood Teams. The main driver of the underspend is staffing budget underspends due to staff vacancies in the Assessment and Care Management budget.

The workforce retention strategy continues to recruit Social Workers in Operational teams thereby strengthening focus on delivery of care package savings. However, recruiting to vacant care support worker roles in the Intermediate care services remains a challenge and therefore affects the ability to deliver services to their full capacity.

Care in the Community - £1.595m Overspend.

The Care in the Community budget is forecast to overspend by £1.595m, this is a £0.716m improvement on the forecast reported at quarter 1.

The improved position between quarter 1 and quarter 2 is due to a plateauing of hospital discharges into home care and residential settings.

The £1.595m overspend is due to, an increase in demand for Home Care packages as a result of supporting hospital discharges into home care settings, additional 'in year demand' demand or increases to existing care packages and legacy demand pressures because of the Covid Hospital Discharge policy.

Commissioning & Procurement (Other) – Balanced Budget

The Commissioning and Procurement Budget is forecast to balance and reporting a £1.202m improvement to the quarter 1 position.

Public Health - £0.180m Underspend

The Public Health budget is forecast to underspend by £0.180m and is a £0.152m increase on the underspend reported at quarter 1. The increase in the underspend is as a result of the recent zero-based budgeting exercise which identified £0.140m of Public Health contract savings.

Operations - £1.640m overspend

Operations	Current Budget	Projected Outturn	Quarter 2 Variance	Quarter 1 Variance	Movement from Quarter 1
	£m	£m	**£m**	£m	£m
Arts & Museums	0.577	0.560	**(0.017)**	0.024*	(0.041)
Commercial Services	(0.917)	(0.506)	**0.411**	0.450	(0.039)
Engineers	(0.766)	(0.694)	**0.072**	0.307	(0.235)
Facilities Management	2.210	2.319	**0.109**	0.092	0.017
Health & Environmental Protection	1.208	1.100	**(0.108)**	(0.012)	(0.096)
Operations Senior Management	0.464	0.460	**(0.003)**	0.369	(0.372)
Street Scene Maintenance	4.163	4.412	**0.249**	0.703	(0.454)
Waste, Transport & Stores	4.992	5.324	**0.332**	0.218	0.114
Wellness	2.078	2.674	**0.596**	0.589	0.007
Total Forecast over / (under) spend	14.009	15.649	**1.640**	2.740	(1.100)

*adjusted for movement of Art Galleries and Museums from Corporate Core Services to Operations.

Operations - Financial Headlines

Overall, the month 6 forecast position for the Department of Operations is a £1.640m overspend a reduction from quarter 1 of £1.100m. The service is reviewing options to mitigate the overspends on a regular basis. Included within the budget is a saving target of £1.790m 12.78% of the budget of which £0.718m remains to be achieved.

Wellness Operations, £0.596m overspend.

There is a forecast overspend in leisure centres and libraries due to increased costs of energy in 2023/24 of £0.490m, costs relating automated access in the leisure centres of £0.117m, and forecast under-achievement of income of £0.052m, this has been partially offset by underspends in Sports Development of £0.052m.

The service planned to mitigate the overspend through applying for funding to support the increased energy costs in Leisure services however the bid was unsuccessful. The service is reviewing other options to mitigate the overspend in the current year and reduce the forecast overspend by the year end.

Future energy costs are expected to reduce in 2024/25 to mitigate the pressure in future years.

Bereavement fees and charges income is forecast to over-achieve by £0.040m.

Street Scene, - £0.249m overspend

There is a forecast overspend of £0.427m due partly to increased energy costs of £0.237m increasing the costs of street lighting and £0.190m underachieved savings on the implementation of LED lanterns due to capacity issues. The saving will be achieved in full in 2024/25.

The moratorium on spend and underspends within grounds maintenance and the planned use of reserves has partly mitigated the overspend.

Commercial Services, £0.411m overspend

The Markets across Bury are forecasting to overspend by £0.282m due to an underachievement of income of £0.166m which is being reviewed for future years as the income target is overstated. The market occupancy rate is 98%. There is also a forecast overspend on energy costs of £0.211m due to the increased price, however there are a number of underspends partially mitigating the overspend.

Catering Services is £0.057m overspent and has been partially mitigated through the use of the catering reserve.

The Civic Halls budget is overspending by £0.071m and relates to staffing costs which are being incurred whilst civics are being mothballed.

Waste, Transport and Stores, £0.285m overspend

The waste, transport and stores service is forecasting an overspend this is due to a number of overspends across the services including fuel costs of £0.222m and the underachievement of the vehicle maintenance savings target of £0.100m, partially offset by mitigating underspends.

Health & Environment Protection, - (£0.108m) underspend.

An increase of £0.096m from the quarter 1 forecast position. The forecast underspend is due to the spend moratorium.

Facilities Management, - £0.109m overspend

The overspend relates to underachievement of income from admin buildings income of £0.126m, energy £0.078m, cleaning costs £0.076m offset by underspends on moratorium codes £0.280m, and salaries £0.064m.

Savings 2023/24

The savings target for the 2023/24 financial year was £18.569m and a further £ 3.781m of savings from 2022/23 brought forward into 2023/24 bring the total savings to be achieved to £22.350m which is 11.7% of the net budget.

Services have successfully delivered £12.850m of the savings target and forecast to achieve a further £6.039m by the end of the financial year which equates to 85% of the target. This leaves a forecast unachieved savings of £3.461m.

Work is ongoing to further deliver savings in year and mitigate any savings which are undeliverable in year.

Council wide Savings Tracker		2023/24			
Savings Group	Directorate Savings Programme	Savings target	Savings achieved to date	Forecast	Variance
Budget Savings 2023/24	All	£2,712,000	£2,068,964	£2,672,600	-£39,400
	Business Growth & Investment	£750,000	£0	£700,000	-£50,000
	Children & Young People	£707,000	£507,000	£507,000	-£200,000
	Corporate Core	£591,000	£379,725	£564,675	-£26,325
	Corporate Core Finance	£150,000	£150,000	£150,000	£0
	Housing General Fund	£964,000	£0	£539,000	-£425,000
	Department of Operations	£1,296,000	£585,041	£969,855	-£326,145
	Non-service Specific	£1,638,000	£1,638,000	£1,638,000	£0
	Department of Health & Adult Care	£5,800,000	£3,173,079	£5,600,000	-£200,000
Subtotal Cabinet 2023 agreed savings		£14,608,000	£8,501,809	£13,341,130	-£1,266,870
Budget Savings 2023/24	Business Growth & Investment	£500,000	£500,000	£500,000	£0
	Department of Operations	£200,000	£74,828	£80,000	-£120,000
	Department of Health & Adult Care	£1,961,000	£1,004,557	£1,976,900	£15,900
Subtotal Cabinet 2022 agreed savings		£2,661,000	£1,579,385	£2,556,900	-£104,100
Once	Digitilisation & Channel Shift	£900,000	£247,000	£247,000	-£653,000
Once	Digitilisation & Channel Shift	-£100,000	£0	£0	£100,000
Flexibly	Building Revenue Reductions	£500,000	£0	£0	-£500,000
Subtotal Transformation 2023 agreed savings		£1,300,000	£247,000	£247,000	-£1,053,000
2023/24 Savings Target		£18,569,000	£10,328,194	£16,145,030	-£2,423,970

2022/23 unachieved savings	Children & Young People	£320,000	£120,000	£120,000	-£200,000
	Department of Health & Adult Care	£1,546,161	£1,255,377	£1,396,332	-£149,829
	Department of Operations	£294,000	£0	£22,000	-£272,000
	Transformation savings	£1,621,127	£1,145,900	£1,204,400	-£416,727
Subtotal 2022/23 unachieved savings		£3,781,288	£2,521,277	£2,742,732	-£1,038,556

Savings Target (2022/23 and 2023/24)	£22,350,288	£12,849,471	£18,887,762	-£3,462,526

Bury
Council

Appendix 2

Capital Programme

The Capital Programme is set on a three-year rolling basis and the programme for 2023/2024 to 2025/2026 was approved by Council in February 2023, as follows:

2023/24 £127.198m
2024/25 £73.500m
2025/26 £28.630m

At the 12 July 2023 Cabinet meeting, a further £17.390m of slippage from 2022/23 was added to the 2023/24 programme, to increase the 2023/24 Capital Programme to £144.588m.

For quarter 2, project managers have continued to review their respective capital schemes and are proposing updates and re-phasing into future years of the Capital Programme to match the anticipated timing of spend, as a result of more up to date information becoming available.

The proposed scheme updates at quarter 2 reduce the overall 2023/24 Capital Programme by £67.035m, from £144.588m to £77.553m.

	2023/24	In-Year Performance				Q2 to Q1 Movement		2024/25	2025/26
	Revised Programme £m	Actual Spend at Q2 £m	Actual Spend at Q2 %	Forecast Spend Q2 £m	Forecast (Under) / Over Spend £m	Forecast Spend Q1 £m	Movement Q2 to Q1 £m	Revised Programme £m	Revised Programme £m
Capital Expenditure by Theme									
Regeneration and Economic Growth	**£12.658**	£2.113	17%	£12.446	(£0.213)	£14.517	(£2.071)	**£73.632**	**£16.073**
Place Shaping/Growth	**£2.025**	£0.618	31%	£2.005	(£0.020)	£2.485	(£0.480)	**£1.286**	**£0.000**
Sports and Leisure	**£3.936**	£0.978	25%	£3.866	(£0.071)	£2.966	£0.899	**£3.365**	**£2.000**
Operational Fleet	**£3.735**	£2.032	54%	£3.735	£0.000	£3.735	£0.000	**£0.000**	**£0.000**
ICT and Digital	**£0.780**	£0.400	51%	£2.206	£1.426	£1.729	£0.478	**£0.000**	**£0.000**
Highways	**£20.486**	£4.894	24%	£19.722	(£0.764)	£16.800	£2.921	**£10.284**	**£6.330**
Children and Young People	**£9.512**	£1.171	12%	£9.509	(£0.002)	£23.246	(£13.737)	**£18.955**	**£0.000**
Estate Management - Investment Estate	**£0.075**	£0.000	0%	£0.070	(£0.005)	£0.000	£0.070	**£0.081**	**£0.000**
Estate Management - Corporate Landlord	**£2.963**	£1.516	51%	£2.890	(£0.073)	£2.930	(£0.039)	**£1.591**	**£0.850**
Older People and Disabled Facilities Grant	**£1.676**	£0.621	37%	£1.500	(£0.176)	£1.495	£0.005	**£1.650**	**£0.000**
Housing GF	**£0.635**	£0.215	34%	£0.654	£0.019	£0.179	£0.475	**£2.267**	**£0.000**
Housing HRA	**£18.794**	£2.147	11%	£18.255	(£0.538)	£18.793	(£0.538)	**£14.247**	**£14.000**
Climate Change	**£0.277**	£0.015	6%	£0.277	£0.000	£0.276	£0.001	**£0.142**	**£0.000**
TOTAL EXPENDITURE	**£77.553**	**£16.720**	**22%**	**£77.135**	**(£0.418)**	**£89.151**	**(£12.016)**	**£127.500**	**£39.253**
Financing the Capital Programme									
Prudential Borrowing	**£18.358**			£19.310	£0.952	£20.279	(£0.969)	**£65.725**	**£19.980**
External Funding	**£38.306**			£36.380	(£1.926)	£47.771	(£11.391)	**£43.710**	**£3.446**
Capital Receipts	**£1.708**			£2.105	£0.397	£1.525	£0.580	**£3.253**	**£1.827**
General Fund RCCO	**£1.617**			£1.085	(£0.532)	£0.783	£0.301	**£0.566**	**£0.000**
Housing Revenue Account DRF/MRR	**£17.564**			£18.255	£0.692	£18.793	(£0.538)	**£14.247**	**£14.000**
TOTAL FINANCING	**£77.553**			**£77.135**	**(£0.418)**	**£89.151**	**(£12.016)**	**£127.500**	**£39.253**

The proposed updates are a combination of additions and reductions in 2023/24, and re-phasing into 2024/25 and 2025/26, as follows:

Additions: £19.640m
Mainly relates to school's grant funding, of:
- £5.839m, Basic Need.
- £2.127m, High Needs.
- £2.025m, School Condition.
- £500k, New Radcliffe School, and
- £305k, Devolved Formula Grant.

Other grant funded schemes of:
- £3.499m, Highways Schemes.
- £2.258m, Disabled Facilities Grant.
- £1.800m, Radcliffe 3G Pitch and Changing Pavilion (Football Foundation Grant).
- £615k, Bury Streets for All,
- £345k, Ramsbottom Street for All.
- £100k, Radcliffe & Redvales Flood - Close Park Changing Rooms (Environment Agency).

Reductions: (£5.785m)
Mainly relates to the following schemes that were all funded from prudential borrowing, of:
- £2.000m, Primary special school (special school 3), due to the DfE bid being unsuccessful.
- £1.500m, Transport Asset Management Plans, not required due to all vehicles being ordered.
- £590k, FM Emergency Building Major Repairs & Audit compliance remedials, not required.
- £553k, A56 Prestwich Village Corridor Improvements.
- £500k, Springwater Park Phase 2 22/23, and
- £500k, Commercial Sites (Cyclical Commercial).

Re-phasing to 2024/25: (£72.269m)
Mainly relates to schemes funded through a mixture of LUF grant and borrowing, of:
- £21.122m, Radcliffe Hub.
- £22.333m, Bury Flexi Hall

Other notable schemes include:
- £18.955m, Schools Basic Needs, High Needs and School Condition grant funding.
- £2.214m, Prestwich Village, funded by prudential borrowing.
- £1.625m, Highways Schemes, funded through a mixture of grants and prudential borrowing.
- £1.522m, Disabled Facilities Grant funding.
- £902k, Sports 3D Pitches, funded through a mixture of capital grants and

receipts and prudential borrowing.
- £726k, Parks and Green Spaces Strategy, funded through prudential borrowing.

Re-phasing to 2025/26: (£8.622m)
- £6.073m, Prestwich Village, funded by prudential borrowing.
- £1.700m, Sports 3D Pitches, funded through a mixture of capital grants and receipts and prudential borrowing.
- £849k, Springwater Park Phase 2, funded through prudential borrowing.

A breakdown of the 2023/24 to 2025/26 proposed Revised Capital Programme is provided in the table below.

	2023/24				In-Year Performance				2024/25			2025/26		
	Approved Programme FEB23 £m	2022/23 Slippage at Outturn £m	In-Year Programme Updates £m	Revised Programme £m	Actual Spend at Q2 £m	Actual Spend at Q2 %	Forecast Spend Q2 £m	Forecast (Under) / Over Spend £m	Approved Programme FEB23 £m	Programme Updates £m	Revised Programme £m	Approved Programme FEB23 £m	Programme Updates £m	Revised Programme £m
Capital Programme														
Regeneration and Economic Growth														
Radcliffe Hub	£27.380	£1.448	(£20.706)	**£8.123**	£1.191	15%	**£8.326**	£0.204	£8.518	£21.122	**£29.639**	£0.000	£0.000	**£0.000**
Radcliffe Hub - FF&E	£0.000	£0.000	£0.000	**£0.000**	£0.000	0%	**£0.000**	£0.000	£1.125	£0.000	**£1.125**	£0.000	£0.000	**£0.000**
Radcliffe Enterprise Centre Design Development	£0.121	£0.000	(£0.012)	**£0.109**	£0.047	43%	**£0.000**	(£0.109)	£0.246	£0.012	**£0.258**	£0.000	£0.000	**£0.000**
Radcliffe Enterprise Centre	£0.000	£0.000	£0.000	**£0.000**	£0.000	0%	**£0.000**	£0.000	£4.700	£0.000	**£4.700**	£0.000	£0.000	**£0.000**
CRSTS: Radcliffe SOBC	£1.380	£0.000	(£1.380)	**£0.000**	£0.000	0%	**£0.000**	£0.000	£0.000	£0.000	**£0.000**	£0.000	£0.000	**£0.000**
Prestwich	£8.362	£0.826	(£8.170)	**£1.018**	£0.181	18%	**£1.011**	(£0.007)	£11.092	(£7.786)	**£3.306**	£0.000	£16.073	**£16.073**
Ramsbottom	£0.272	£0.015	(£0.200)	**£0.086**	£0.000	0%	**£0.000**	(£0.086)	£0.000	£0.200	**£0.200**	£0.000	£0.000	**£0.000**
Bury Flexi Hall	£25.511	£0.010	(£22.413)	**£3.108**	£0.684	22%	**£3.108**	(£0.000)	£12.072	£22.333	**£34.405**	£0.000	£0.000	**£0.000**
Commercial Sites Regeneration	£0.500	£0.214	(£0.500)	**£0.214**	£0.011	5%	**£0.000**	(£0.214)	£0.500	(£0.500)	**£0.000**	£0.000	£0.000	**£0.000**
Regeneration and Economic Growth Total	**£63.526**	**£2.512**	**(£53.380)**	**£12.658**	**£2.113**	**17%**	**£12.446**	**(£0.213)**	**£38.252**	**£35.380**	**£73.632**	**£0.000**	**£16.073**	**£16.073**
Place Shaping/Growth Total	**£2.091**	**£1.316**	**(£1.382)**	**£2.025**	**£0.618**	**31%**	**£2.005**	**(£0.020)**	**£0.350**	**£0.936**	**£1.286**	**£0.000**	**£0.000**	**£0.000**
Sports and Leisure Total	**£4.817**	**£0.963**	**(£1.843)**	**£3.936**	**£0.978**	**25%**	**£3.866**	**(£0.071)**	**£1.260**	**£2.105**	**£3.365**	**£0.300**	**£1.700**	**£2.000**
Operational Fleet Total	**£3.469**	**£1.766**	**(£1.500)**	**£3.735**	**£2.032**	**54%**	**£3.735**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**
ICT and Digital Total	**£0.858**	**(£0.087)**	**£0.008**	**£0.780**	**£0.400**	**51%**	**£2.206**	**£1.426**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**	**£0.000**
Highways														
Cycle and Walking Routes	£2.011	(£0.875)	£1.900	**£3.037**	£0.296	10%	**£2.996**	(£0.040)	£0.000	£0.000	**£0.000**	£0.000	£0.000	**£0.000**
Highways	£3.964	£4.192	£4.255	**£12.411**	£3.010	24%	**£12.076**	(£0.335)	£3.483	£1.093	**£4.576**	£2.884	£0.000	**£2.884**
Street Lighting	£1.730	(£0.025)	£0.000	**£1.705**	£0.964	57%	**£2.330**	£0.625	£1.730	£0.000	**£1.730**	£0.000	£0.000	**£0.000**
Traffic Calming and Improvement	£0.538	£0.045	(£0.553)	**£0.030**	£0.000	0%	**£0.030**	£0.000	£0.000	£0.000	**£0.000**	£0.000	£0.000	**£0.000**
City Region Sustainable Transport Core Maintenance	£3.273	£0.471	(£0.986)	**£2.757**	£0.000	0%	**£1.744**	(£1.013)	£2.546	£0.000	**£2.546**	£2.546	£0.000	**£2.546**
City Region Sustainable Transport Strategic Maintenance	£0.900	£0.024	(£0.924)	**£0.000**	£0.000	0%	**£0.000**	£0.000	£0.900	£0.532	**£1.432**	£0.900	£0.000	**£0.900**
Road Safety	£0.300	£0.280	(£0.035)	**£0.546**	£0.623	114%	**£0.546**	£0.000	£0.000	£0.000	**£0.000**	£0.000	£0.000	**£0.000**
Highways Total	**£12.716**	**£4.113**	**£3.657**	**£20.486**	**£4.894**	**24%**	**£19.722**	**(£0.764)**	**£8.659**	**£1.625**	**£10.284**	**£6.330**	**£0.000**	**£6.330**
Children and Young People														
Children and Young People All Schools	£14.028	£3.639	(£8.156)	**£9.512**	£1.171	12%	**£9.509**	(£0.002)	£0.000	£18.955	**£18.955**	£0.000	£0.000	**£0.000**

	2023/24				In-Year Performance				2024/25			2025/26		
	Approved Programme FEB23	2022/23 Slippage at Outturn	In-Year Programme Updates	Revised Programme	Actual Spend at Q2	Actual Spend at Q2	Forecast Spend Q2	Forecast (Under) / Over Spend	Approved Programme FEB23	Programme Updates	Revised Programme	Approved Programme FEB23	Programme Updates	Revised Programme
	£m	£m	£m	£m	£m	%	£m	£m	£m	£m	£m	£m	£m	£m
Children and Young People - New Special School	£2.000	£0.000	(£2.000)	**£0.000**	£0.000	0%	**£0.000**	£0.000	£8.500	(£8.500)	**£0.000**	£8.000	(£8.000)	**£0.000**
Children and Young People - Star Academy	£0.000	£0.000	£0.000	**£0.000**	£0.000	0%	**£0.000**	£0.000	£0.000	£0.000	**£0.000**	£0.000	£0.000	**£0.000**
Children and Young People Total	**£16.028**	**£3.639**	**(£10.156)**	**£9.512**	**£1.171**	**12%**	**£9.509**	**(£0.002)**	**£8.500**	**£10.455**	**£18.955**	**£8.000**	**(£8.000)**	**£0.000**
Estate Management - Investment Estate Total	**£0.086**	**£0.070**	**(£0.081)**	**£0.075**	**£0.000**	**0%**	**£0.070**	**(£0.005)**	**£0.000**	**£0.081**	**£0.081**	**£0.000**	**£0.000**	**£0.000**
Estate Management - Corporate Landlord														
Fernhill Gypsy and Traveller Site	£1.566	(£0.196)	£0.000	**£1.370**	£1.418	103%	**£1.418**	£0.047	£0.000	£0.000	**£0.000**	£0.000	£0.000	**£0.000**
Springwater Park	£1.850	£0.100	(£1.350)	**£0.600**	£0.023	4%	**£0.600**	£0.000	£0.750	£0.000	**£0.750**	£0.000	£0.850	**£0.850**
Muslim Burial Extension	£0.025	£0.007	(£0.029)	**£0.003**	£0.000	0%	**£0.003**	£0.000	£0.000	£0.029	**£0.029**	£0.000	£0.000	**£0.000**
Welfare Facilities and Emergency Building Repairs	£1.324	£0.576	(£0.911)	**£0.989**	£0.076	8%	**£0.869**	(£0.120)	£1.482	(£0.669)	**£0.813**	£0.000	£0.000	**£0.000**
Estate Management - Corporate Landlord Total	**£4.765**	**£0.487**	**(£2.289)**	**£2.963**	**£1.516**	**51%**	**£2.890**	**(£0.073)**	**£2.232**	**(£0.641)**	**£1.591**	**£0.000**	**£0.850**	**£0.850**
Older People and Disabled Facilities Grant														
Older People	£0.223	£0.000	(£0.128)	**£0.095**	£0.001	1%	**£0.000**	(£0.095)	£0.000	£0.128	**£0.128**	£0.000	£0.000	**£0.000**
Disabled Facilities Grant	£0.487	£0.359	£0.735	**£1.581**	£0.620	39%	**£1.500**	(£0.081)	£0.000	£1.522	**£1.522**	£0.000	£0.000	**£0.000**
Older People and Disabled Facilities Grant Total	**£0.710**	**£0.359**	**£0.608**	**£1.676**	**£0.621**	**37%**	**£1.500**	**(£0.176)**	**£0.000**	**£1.650**	**£1.650**	**£0.000**	**£0.000**	**£0.000**
Housing GF														
Empty Property Strategy	£0.368	£0.000	£0.000	**£0.368**	£0.032	9%	**£0.368**	£0.000	£0.000	£0.000	**£0.000**	£0.000	£0.000	**£0.000**
Housing Development	£0.811	(£0.008)	(£0.536)	**£0.267**	£0.183	68%	**£0.286**	£0.019	£0.000	£2.267	**£2.267**	£0.000	£0.000	**£0.000**
Housing GF Total	**£1.179**	**(£0.008)**	**(£0.536)**	**£0.635**	**£0.215**	**34%**	**£0.654**	**£0.019**	**£0.000**	**£2.267**	**£2.267**	**£0.000**	**£0.000**	**£0.000**
Housing HRA														
Housing Public Sector	£15.982	£2.012	£0.000	**£17.994**	£1.897	11%	**£17.456**	(£0.537)	£13.447	£0.000	**£13.447**	£13.200	£0.000	**£13.200**
Disabled Facilities Adaptations	£0.800	£0.000	£0.000	**£0.800**	£0.250	31%	**£0.799**	(£0.001)	£0.800	£0.000	**£0.800**	£0.800	£0.000	**£0.800**
Housing HRA Total	**£16.782**	**£2.012**	**£0.000**	**£18.794**	**£2.147**	**11%**	**£18.255**	**(£0.538)**	**£14.247**	**£0.000**	**£14.247**	**£14.000**	**£0.000**	**£14.000**
Climate Change Total	**£0.171**	**£0.248**	**(£0.142)**	**£0.277**	**£0.015**	**6%**	**£0.277**	**£0.000**	**£0.000**	**£0.142**	**£0.142**	**£0.000**	**£0.000**	**£0.000**
TOTAL EXPENDITURE	**£127.198**	**£17.391**	**(£67.035)**	**£77.553**	**£16.720**	**22%**	**£77.135**	**(£0.418)**	**£73.500**	**£54.000**	**£127.500**	**£28.630**	**£10.623**	**£39.253**
Financing the Capital Programme														
Prudential Borrowing	£54.274	£8.404	(£44.320)	**£18.358**			**£19.310**	£0.952	£55.330	£10.395	**£65.725**	£11.057	£8.923	**£19.980**
External Funding	£50.165	£5.901	(£17.760)	**£38.306**			**£36.380**	(£1.926)	£3.446	£40.264	**£43.710**	£3.446	£0.000	**£3.446**

	2023/24				In-Year Performance				2024/25			2025/26		
	Approved Programme FEB23 £m	2022/23 Slippage at Outturn £m	In-Year Programme Updates £m	Revised Programme £m	Actual Spend at Q2 £m	Actual Spend at Q2 %	Forecast Spend Q2 £m	Forecast (Under) / Over Spend £m	Approved Programme FEB23 £m	Programme Updates £m	Revised Programme £m	Approved Programme FEB23 £m	Programme Updates £m	Revised Programme £m
Capital Receipts	£5.575	£0.624	(£4.491)	**£1.708**			**£2.105**	£0.397	£0.477	£2.776	**£3.253**	£0.127	£1.700	**£1.827**
General Fund RCCO	£1.632	£0.450	(£0.465)	**£1.617**			**£1.085**	(£0.532)	£0.000	£0.566	**£0.566**	£0.000	£0.000	**£0.000**
Housing Revenue Account DRF/MRR	£15.552	£2.012	£0.000	**£17.564**			**£18.255**	£0.692	£14.247	£0.000	**£14.247**	£14.000	£0.000	**£14.000**
TOTAL FINANCING	**£127.198**	**£17.391**	**(£67.035)**	**£77.553**			**£77.135**	**(£0.418)**	**£73.500**	**£54.000**	**£127.500**	**£28.630**	**£10.623**	**£39.253**

APPENDIX 3

TREASURY MANAGEMENT MID YEAR REPORT 2023/24

1. INTRODUCTION

1.1 Residents of Bury should have access to services that are safe, well maintained, and fit for purpose. Whether those services are provided in buildings, (schools, commercial sites, and Bury Market) or in the form of local infrastructure, (roads and street lighting), investment is required to build and maintain these facilities.

1.2 Facilities such as schools, libraries, roads, and street lighting will last for many years. Consequently, Bury Council is allowed to borrow money from the Government, through the Public Works Loans Board (PWLB), and pay it back over many years. Bury Council pays back both the amount borrowed from the Government, called the repayment of principal, together with an amount of interest agreed when the loan is made.

1.3 Bury Council has a policy of adopting a prudent approach to borrowing. The Council borrows to provide facilities for its core functions.

1.4 The Council determines which of its core functions needs investment, and determines the amount of that investment, when it approves the Capital Programme in February each year.

1.5 At first sight, financing the Capital Programme may seem a straightforward process. Identify the need for a new facility, borrow the money to build it, build it, then repay principal and interest.

1.6 However, local authorities are *not* required to link their loans to specific properties or facilities in the way that a mortgage is secured on a house. Instead, local authorities can borrow large sums of money from the Government to finance a whole capital programme if they choose to do so, providing they can afford the repayments.

1.6 Therefore, at the point of borrowing to pay for the capital programme, management of the borrowing used to finance it, and management of the newly provided facilities become two separate functions.

1.7 The facilities are typically managed by the service delivery teams that occupy them.

1.8 The loans are managed by the Corporate Finance Team under the direction of the Executive Director of Finance. Local authority finance functions should meet the standards of professional practice set by CIPFA. CIPFA's standards for borrowing and lending money are set out in the publication:

"*Treasury Management in the Public Services: Code of Practice* (the CIPFA Code)."

1.9 The CIPFA Code requires local authorities to receive and approve Reports from the Chief Finance Officer. The most important report is the annual Treasury Management Strategy. The Council approved its Treasury Management Strategy for 2023/24 in February 2023.

1.10 In addition to managing the Council's long-term borrowing requirements, the Council's finance team also manage the Council's large cash balances and capital receipts. This involves lending and investing the Council's cash to deliver a low risk return.

2. BURY'S TREASURY MANAGEMENT PRIORITIES FOR 2023/24 ARE SECURITY, LIQUIDITY AND YIELD

2.1 Bury's Treasury Management Strategy for 2023/24 identifies three priorities, which, starting with the most important are security, liquidity, and yield.

2.2 When lending money from its cash balances, or making cash deposits with banks, the return ***of*** the Council's money is more important to Bury than the return ***on*** its money. The Council must be able to get its money back (security) when it wants it back (liquidity) together with some interest (yield).

2.3 When borrowing money, typically for the purposes of financing the Capital Programme, the Council will set Prudential Indicators for the next three years to ensure that capital investment plans are affordable, prudent, and sustainable (see Table One and Table Two, below, and the accompanying narrative).

2.4 The Cabinet and Council receive reports on the effectiveness with which its treasury management function delivers these priorities at least twice a year in the form of a half-yearly report and an annual report.

2.5 This report is the half-yearly report for the period April to September 2023. This report meets the requirement in the 2021 Code, mandatory from 1st April 2023.

2.6 This report describes how well Bury is achieving the objectives set out in the Council's Treasury Management Strategy for 2023/24 approved by Council on 22 February 2023.

2.7 Table One below summarises the Council's planned capital expenditure by theme as at the end of September 2023. Table Two below describes how that capital expenditure will be financed.

3. PRUDENTIAL INDICATORS FOR CAPITAL EXPENDITURE AND BORROWING

3.1 Bury measures and manages its capital expenditure and borrowing with reference to the Prudential Indicators prescribed in the CIPFA Prudential Code. These Indicators are set to ensure that the Council's capital investment plans are affordable, prudent, and sustainable.

3.2 The Council is planning capital expenditure (as at 30 September 2023) as set out in Table One below. This capital expenditure will be financed (as at 30 September 2023) from the sources identified in Table Two below. Note that the forecast spend for 2023-24 is £77.135m.

Table One. Capital Expenditure 2023/24, Position at Quarter 2 2023/24 and

Table Two. Financing the Capital Expenditure

CAPITAL PROGRAMME at Q2	2023/24			2024/25	2025/26
	Revised Programme £m	Forecast Spend Q2 £m	Forecast (Under) / Over Spend £m	Revised Programme £m	Revised Programme £m
Capital Expenditure by Theme					
Regeneration and Economic Growth	**£12.658**	£12.446	(£0.213)	**£73.632**	**£16.073**
Place Shaping/Growth	**£2.025**	£2.005	(£0.020)	**£1.286**	**£0.000**
Sports and Leisure	**£3.936**	£3.866	(£0.071)	**£3.365**	**£2.000**
Operational Fleet	**£3.735**	£3.735	£0.000	**£0.000**	**£0.000**
ICT and Digital	**£0.780**	£2.206	£1.426	**£0.000**	**£0.000**
Highways	**£20.486**	£19.722	(£0.764)	**£10.284**	**£6.330**
Children and Young People	**£9.512**	£9.509	(£0.002)	**£18.955**	**£0.000**
Estate Management - Investment Estate	**£0.075**	£0.070	(£0.005)	**£0.081**	**£0.000**
Estate Management - Corporate Landlord	**£2.963**	£2.890	(£0.073)	**£1.591**	**£0.850**
Older People and Disabled Facilities Grant	**£1.676**	£1.500	(£0.176)	**£1.650**	**£0.000**
Housing GF	**£0.635**	£0.654	£0.019	**£2.267**	**£0.000**
Housing HRA	**£18.794**	£18.255	(£0.538)	**£14.247**	**£14.000**
Climate Change	**£0.277**	£0.277	£0.000	**£0.142**	**£0.000**
TOTAL EXPENDITURE	**£77.553**	**£77.135**	**(£0.418)**	**£127.500**	**£39.253**
Financing the Capital Programme					
Prudential Borrowing	**£18.358**	£19.310	£0.952	**£65.725**	**£19.980**
External Funding	**£38.306**	£36.380	(£1.926)	**£43.710**	**£3.446**
Capital Receipts	**£1.708**	£2.105	£0.397	**£3.253**	**£1.827**
General Fund RCCO	**£1.617**	£1.085	(£0.532)	**£0.566**	**£0.000**
Housing Revenue Account DRF/MRR	**£17.564**	£18.255	£0.692	**£14.247**	**£14.000**
TOTAL FINANCING	**£77.553**	**£77.135**	**(£0.418)**	**£127.500**	**£39.253**

Table Three: BURY COUNCIL CAPITAL PROGRAMME 2024-25: EXPENDITURE AND FINANCING PROJECTIONS

CAPITAL PROGRAMME at Q2	2022-23 Actual £m	2023-24 Forecast £m	2024-25 Forecast £m	2025-26 Forecast £m
Non-HRA	£55.192	£58.880	£113.253	£25.253
HRA	£13.297	£18.255	£14.247	£14.000
Total Capital Expenditure	**£68.489**	**£77.135**	**£127.500**	**£39.253**
Resourced By:				
External Funding	£17.760	£36.380	£43.710	£3.446
Capital Receipts	£0.254	£2.105	£3.253	£1.827
General Fund RCCO	£0.706	£1.085	£0.566	£0.000
Housing Revenue Account DRF/MRR	£12.257	£18.255	£14.247	£14.000
Total Resourced By	**£30.977**	**£57.825**	**£61.775**	**£19.273**
Financing Requirement	**£37.512**	**£19.310**	**£65.725**	**£19.980**
Capital Financing Requirement (CFR)				
CFR Opening Balance	£311.079	£346.793	£363.828	£426.930
Financing Requirement	£37.512	£19.310	£65.725	£19.980
Minimum Revenue Provision (MRP)	(£1.798)	(£2.275)	(£2.623)	(£3.306)
CFR Closing Balance	**£346.793**	**£363.828**	**£426.930**	**£443.604**

Note to Table 3: CFR means Capital Financing Requirement. This is a calculation to show Bury's cumulative outstanding debt. The CFR increases as new debt is incurred, and reduces as loans are repaid, and as Minimum Revenue Provision (MRP) is applied, and as capital receipts are applied to replace debt.

3.4 The Tables above are required by the CIPFA Code of practice and are underpinned by detailed calculations carried out by the finance team. An extract from the capital programme is included in the table below

Borrowing Headliners	23-24 £m	24-25 £m	25-26 £m	Total £m
Radcliffe Hub	£0.0	£28.3	£0.0	£28.3
Prestwich Village	£0.9	£3.3	£16.1	£20.3
Bury Market	£0.0	£23.4	£0.0	£23.4
Commerical Sites	£0.0	£1.0	£0.0	£1.0
ICT	£1.8	£2.8	£0.2	£4.8
Parks & Sports	£3.3	£0.0	£0.0	£3.3
Fleet Replacement	£2.2	£0.0	£0.0	£2.2
St Lighting LED	£2.3	£1.7	£0.0	£4.0
Highways Maintenance	£5.0	£3.9	£2.9	£11.8
Fernhill Traveller Site	£1.4	£0.0	£0.0	£1.4
Springwater Park Ph2	£0.0	£0.8	£0.8	£1.6
FM Repairs	£1.5	£0.8	£0.0	£2.3
Total	**£18.4**	**£66.0**	**£20.0**	**£104.4**

3.5 Bury Council has a very small proportion of its total debt financing capital schemes which have been carried out for the purpose of generating income for the Council's General Fund. Borrowing for such purposes is now prevented by new rules from 2021, issued by the Public Work Loans Board and by a revised CIPFA prudential code, also issued in 2021. It is good practice for Council to receive reports on capital schemes for investment purposes. The Executive Director of Finance will bring forward a separate report covering these schemes later this financial year.

3.6 The Operational Boundary is the limit beyond which external debt is not normally expected to exceed. It is set at the same level as the Council's projected external borrowing.

Operational Boundary	**2023-24 Forecast £m**	**2024-25 Forecast £m**	**2025-26 Forecast £m**
Borrowing	£363.828	£426.930	£443.604
Other Long-term Liabilities	£0.010	£0.010	£0.010
Total	**£363.838**	**£426.940**	**£443.614**

3.7 The Authorised Limit for external debt is a key treasury indicator and represents a control on the maximum level of borrowing. This represents a legal limit beyond which external debt is prohibited, and this limit needs to be set or revised by the Full Council. It reflects the level of external debt which, while not desired, could be afforded in the short-term, but is not sustainable in the longer-term.

3.8 The Authorised Limit is set at a level of £10m above the Operational Boundary.

Authorised Limit	**2023-24 Forecast £m**	**2024-25 Forecast £m**	**2025-26 Forecast £m**
Borrowing	£373.828	£436.930	£453.604
Other Long-term Liabilities	£0.010	£0.010	£0.010

Total	**£373.838**	**£436.940**	**£453.614**

3.9 Following the re-phasing of the capital programme, the Authority is asked to approve the above revised Operational Boundary and Authorised Limit

4. MANAGING THE COUNCIL'S CASH BALANCES

4.1 The Council defines its treasury management activities as 'the management of the authority's borrowing, investments and cash flows, its banking, money market and capital market transactions, the effective control of the risks associated with the activities, and the pursuit of optimum performance consistent with those risks'.

4.2 Cash flow management involves forecasting in-flows and out-flows of cash and ensuring that funds are available to meet expenditure needs. Any surplus monies can be invested with low-risk counterparties in accordance with the Council's approved lending list attached as **Appendix B.**

The Security of the Council's Cash Balances: Identifying creditworthy counterparties.

4.3 In accordance with the guidance from DLUHC and CIPFA, the Council applies minimum acceptable credit criteria to generate the Council's approved lending list of highly creditworthy counterparties. It is important that the Council invests its surplus balances with a range of different counterparties to avoid concentration risk. The key ratings used to monitor counterparties are the Short-Term and Long-Term ratings.

4.4 Ratings will not be the sole determinant of the quality of an institution. it is important to continually assess and monitor the economic and political environments in which institutions operate. The assessment of institutions will also take account of information that reflects the opinion of the financial markets. The Council will engage with its advisers to maintain a monitor on market pricing such as credit default swaps and take that information into account in addition to the credit ratings.

4.5 The Council uses the creditworthiness service provided by its external treasury advisers, Arlingclose. Arlingclose are newly appointed following a procurement process which chose one Adviser for all the Greater Manchester authorities.

4.6 Arlingclose has a sophisticated model using credit ratings from the three main credit rating agencies Fitch, Moody's and Standard and Poor. In addition, in line with the Treasury Management Code of Practice, Arlingclose do not rely solely on the current credit ratings of counterparties. They also apply the following overlays:

- credit watches and credit outlooks from credit rating agencies.
- Credit Default Swap (CDS) spreads to give an early warning of likely changes in credit ratings.
- sovereign ratings to select counterparties from only the most creditworthy countries.

4.7 This modelling approach combines data from these sources to evaluate the relative creditworthiness of counterparties.

4.8 The Council's treasury management performance is very much affected by the economic conditions faced by the country, and by financial markets in particular. There follows a summary of the economic conditions prevailing over the last six months.

5. A SUMMARY OF THE ECONOMIC CONTEXT AFFECTING TREASURY MANAGEMENT PERFORMANCE IN THE 6 MONTHS TO SEPTEMBER 2023.

5.1 The Council's external Treasury Management Advisers, Arlingclose, have provided a detailed commentary on the national economic conditions affecting Bury's borrowing and investments for the six months to September 2023. The economic information provided by Arlingclose is presented in detail in **Appendix A** and a summary is set out below.

UK inflation, interest rates, pay and prices.

5.2 For the six months to September 2023, Arlingclose highlight the following key economic indicators:

- UK inflation remained high.
    - Food prices are not increasing as quickly as they were.
    - CPI is around 7%.
    - The core rate of inflation fell to 6.2% from 6.9%.
- In September the Bank of England held the Bank Rate at 5.25%. This was a lower rate than had been predicted.
    - People with fixed-term mortgages will continue to feel the impact of this material increase in interest rates over the last year or so, as their existing fixed term mortgages come to an end.
- UK economic growth remains weak. This is starting to cause recessionary, or at the very least, stagnating economic conditions.
- Unemployment increased to 4.3%.
- Pay growth was 8.5% for total pay, including bonuses, and 7.8% for regular pay.
- After adjusting for inflation, pay growth in real terms was 1.2% for total pay and 0.6% for regular pay.

Financial Markets

5.3 Gilt yields fell towards the end of the period, and ended the period as follows:

5-year UK benchmark gilt yield	4.29%
10-year UK benchmark gilt yield	4.45%

20-year UK benchmark gilt yield	4.84%

5.4 Gilt yields matter to the Council because they directly affect the cost of the Council's borrowing from the Public Works Loans Board (PWLB).

Credit Review

5.5 Arlingclose provides advice to the Council on the financial strength of banks with whom the Council may lodge deposits. This information is used by officers to maintain the Council's approved lending list, to ensure the Council can get its money back. The Council's proposed **approved lending list criteria** are attached as **Appendix B**.

5.6 Relatively high interest rates from individual lenders must be viewed with caution. The return ***of*** the Council's money is always paramount, and far more important than the return ***on*** the money.

5.7 As well as depositing money with banks, Local Authorities may from time to time lend to one another. In September Arlingclose advised against any new lending to Birmingham City Council because the Council issued a Section 114 notice. A Section 114 notice indicates that a council cannot live within its means, is falling increasingly into deficit and has no coherent plan to manage its way out of that situation.

BURY'S BORROWING

* finance leases, PFI liabilities and transferred debt that form part of the Authority's total debt
** shows only loans to which the Authority is committed and excludes optional refinancing

The treasury management position at 30th September and the change over the six months' is shown in Table 2 below.

Table 2: Treasury Management Summary

	Current Balance 30.09.2023 £m	**Projected Balance 31.03.2024 £m**
Long-term borrowing		
- PWLB	162.2	162.1
- LOBOs	23.0	23.0
- Market	31.3	22.3
- Temporary Loans	2.9	0.00
Total borrowing	**219.4**	**207.4**
Cash and cash equivalents	**8.4**	**5.0**
Total investments	**8.4**	**5.0**

Net borrowing	**211.0**	**202.4**

Borrowing

CIPFA's 2021 Prudential Code says that local authorities must not borrow to invest primarily for financial return. Furthermore, any borrowing must relate directly to delivering the Council's functions. PWLB loans are no longer available to local authorities planning to buy investment assets primarily for yield unless these loans are for refinancing purposes.

Bury's borrowing strategy and activity

Bury's objective when borrowing is to strike a balance between securing lower interest costs and achieving cost certainty. Flexibility to renegotiate loans should the Authority's long-term plans change being a secondary objective. The Council seeks to borrow at affordable rates, without compromising the longer-term stability of the debt portfolio. A stable debt portfolio will have loans of varying durations so that the Council is not at risk in any one financial year of having to refinance substantial sums when interest rates happen to be high.

The Council has been affected by a substantial rise in the cost of both short-term and long-term borrowing over the last 18 months. The Bank Rate rose by 1% in six months, from 4.25% at the beginning of April 2023 to 5.25% at the end of September 2023. The Bank Rate was 2% higher in September 2023 than it was at the end of September 2022.

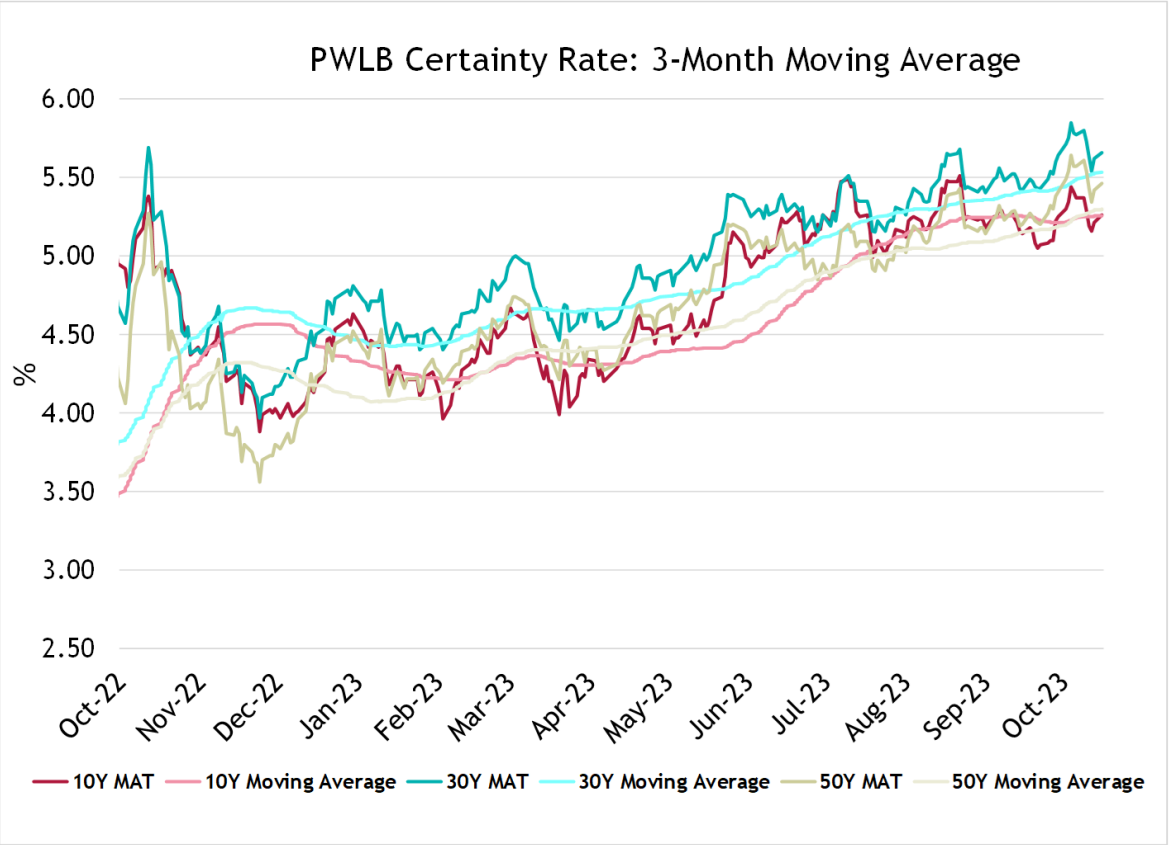
On 30th September 2023, the PWLB certainty rates for maturity loans were:

5.26% for 10-year loans,
5.64% for 20-year loans,
5.43% for 50-year loans.

The equivalent figures on 31st March 2023 were each around 1% lower at:

4.33% for 10-year loans,
4.70% for 20-year loans,
4.41% for 50-year loans.

The chart below illustrates the upward trend in interest rates over the last year.



A new PWLB HRA rate which is 0.4% below the certainty rate was made available from 15th June 2023. Initially available for a period of one year, this discounted rate is to support local authorities borrowing for the Housing Revenue Account and for refinancing existing HRA loans, providing a window of opportunity for HRA-related borrowing.

The Authority's short-term borrowing cost has continued to increase with the rise in Bank Rate and short-dated market rates. The average rate on the Authority's short-term loans at 30th September 2023 of £9.9m was 0.88%, this compares with 0.74% on £17.0m loans 3 months ago.

DIVERSIFYING FUNDING SOURCES

There remains a strong argument for diversifying funding sources, particularly if rates can be achieved on alternatives which are below the PWLB rate of gilt yields + 0.80%.

The UK Infrastructure Bank is one alternative source of funding which offers funding at gilt yields + 0.40% (0.40% below the PWLB certainty rate) and the possibility of more flexible funding structures than the PWLB. Funding from UKIB is generally only available for certain types of projects that meet its criteria of green energy, transport, digital, water and waste. The minimum loan size is £5 million.

The Council is evaluating these lower cost solutions and opportunities with its adviser Arlingclose.

Treasury Investment Activity

The CIPFA Treasury Management Code now defines treasury management investments as those investments which arise from the Authority's cash flows or treasury risk management activity that ultimately represent balances that need to be invested until the cash is required for use in the course of business.

The Authority holds invested funds, representing income received in advance of expenditure plus balances and reserves held. During the half year, the Authority's investment balances ranged between £1.720 million and £8.355 million due to timing differences between income and expenditure. The investment position is shown in table 4 below.

Table 4: Treasury Investment Position

	31.3.23 Balance £m	Net Movement £m	30.9.23 Balance £m	30.9.23 Weighted Average Income Return %
Banks & building societies (unsecured) Banks & building societies (secured deposits) Covered bonds (secured) Government Local authorities and other govt entities Corporate bonds and loans Money Market Funds Other Pooled Funds	1.720	6.635	8.355	4.72
Total investments	**1.720**	**6.635**	**8.355**	**4.72**

Both the CIPFA Code and government guidance require the Authority to invest its funds prudently, and to have regard to the security and liquidity of its treasury investments before seeking the optimum rate of return, or yield. The Authority's objective when investing money is to strike an appropriate balance between risk and return, minimising the risk of incurring losses from defaults and the risk of receiving unsuitably low investment income. This is difficult to achieve when the cash balance is so low. In the 2024/25 Treasury Management Strategy, proposals will be brought forward for a minimum cash balance to be held of £25m, subject to advice to be received from Arlingclose.

As demonstrated by the liability benchmark in this report, the Authority expects to be a long-

term borrower and new treasury investments are therefore primarily made to manage day-to-day cash flows using short-term low risk instruments. The existing portfolio of strategic pooled funds will be maintained to diversify risk into different asset classes and boost investment income.

Compliance

The Executive Director of Finance reports that treasury management activities undertaken complied fully with the principles in the Treasury Management Code and the Authority's approved Treasury Management Strategy.

TREASURY MANAGEMENT PRUDENTIAL INDICATORS

As required by the 2021 CIPFA Treasury Management Code, the Authority should routinely measure and monitor the following treasury management prudential indicators.

1. Liability Benchmark

This indicator compares the Authority's actual existing borrowing against a liability benchmark that has been calculated to show the lowest risk level of borrowing. The liability benchmark is an important tool to help establish whether the Council is likely to be a long-term borrower or long-term investor in the future, and so shape its strategic focus and decision making. It represents an estimate of the cumulative amount of external borrowing the Council must hold to fund its current capital and revenue plans while keeping treasury investments above the minimum level required to manage day-to-day cash flow.

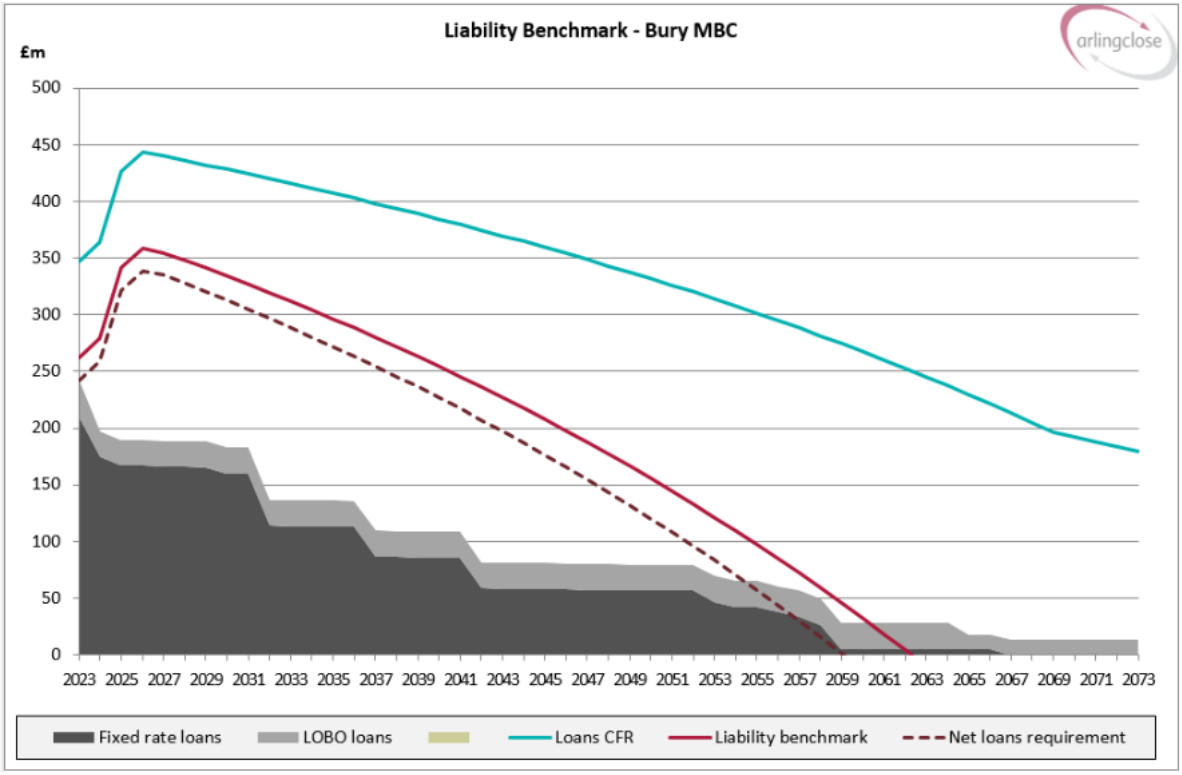
Bury MBC

	Actual	Forecasts	£m					
Position at 31 March	**2023**	**2024**	**2025**	**2026**	**2027**	**2028**	**2029**	**2030**
Loans CFR	346.8	363.8	426.9	443.6	439.8	436.0	432.1	428.1
External borrowing	-243.6	-197.4	-189.9	-189.7	-189.0	-188.7	-188.5	-183.3
Internal (over) borrowing	103.2	166.4	237.0	253.9	250.9	247.3	243.6	244.9
Balance sheet resources	-104.9	-104.9	-104.9	-104.9	-104.9	-108.4	-111.9	-115.6
Investments (new borrowing)	1.7	-61.5	-132.1	-149.0	-146.0	-138.9	-131.6	-129.3
Treasury investments	1.7	20.0	20.0	20.0	20.0	20.5	21.0	21.5
New borrowing	0.0	81.5	152.1	169.0	166.0	159.4	152.7	150.8
Net loans requirement	241.9	258.9	322.1	338.7	335.0	327.6	320.2	312.5
Liquidity allowance	20.0	20.0	20.0	20.0	20.0	20.5	21.0	21.5
Liability benchmark	261.9	278.9	342.1	358.7	355.0	348.1	341.2	334.1

Cash flow £m	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Capex increasing Loans CFR	19.3	65.7	20.0	0.0	0.0	0.0	0.0
MRP on Loans CFR	-2.3	-2.6	-3.3	-3.8	-3.8	-3.9	-4.0
Change in balance sheet resources	0.0	0.0	0.0	0.0	-3.5	-3.6	-3.7
Maturing loans	46.2	7.5	0.2	0.8	0.2	0.2	5.2
Net cash (inflow) outflow	63.2	70.6	16.9	-3.0	-7.1	-7.2	-2.4

Net cost £m	2023/24	2024/25	2025/26	2026/27	2027/28	2028/29	2029/30
Cost at higher interest rates	10.3	14.9	18.8	19.7	19.8	19.7	20.0
Cost at forecast interest rates	9.7	12.2	14.0	13.9	13.4	12.9	12.6
Cost at lower interest rates	9.5	10.6	11.3	10.7	10.1	9.6	9.3

Market forecast rates as at 23/10/2023



Following on from the medium-term forecast above, minimum revenue provision on new capital expenditure based on a 25-year asset life and income, expenditure and reserves all increasing by inflation of 2.5% p.a. This is shown in the chart below together with the maturity profile of the Authority's existing borrowing.

2. Maturity Structure of Borrowing

This prudential indicator is set to control exposure to refinancing risk. Arlingclose, the Council's external advisers, described Bury's actual maturity profile, shown on the graph

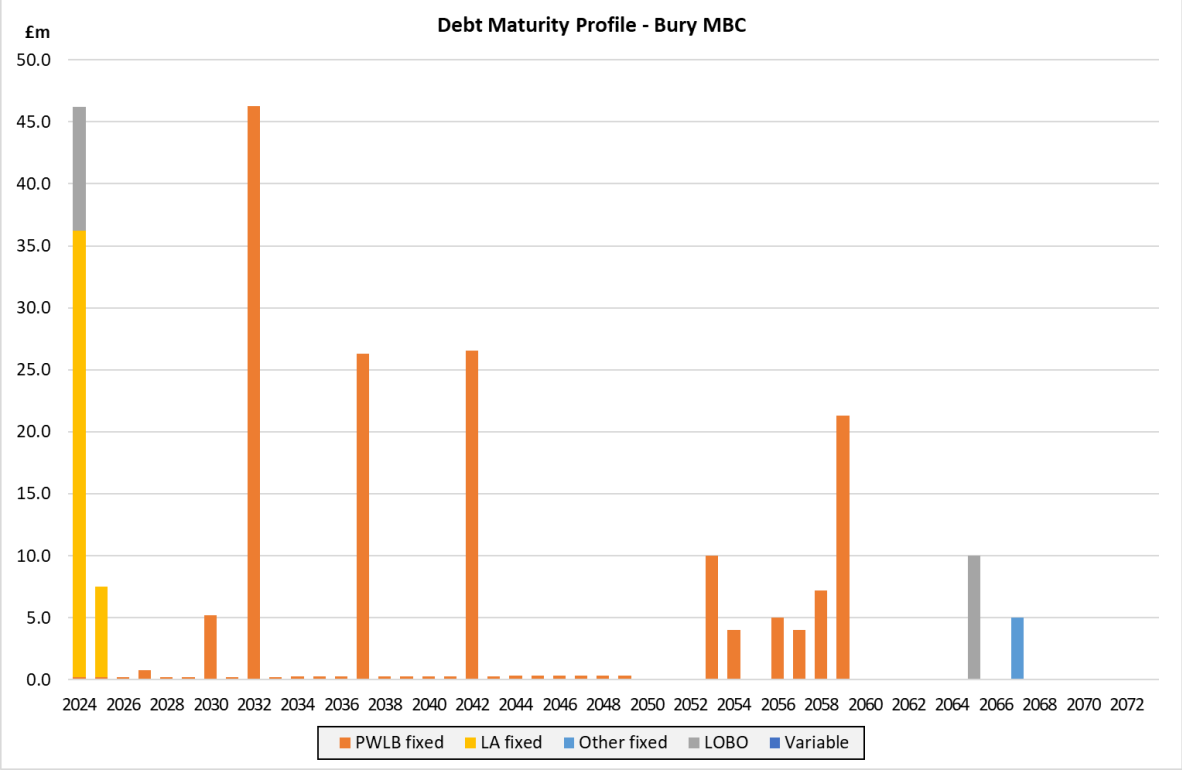
below, as 'unusual'. This is because a material amount of debt falls due for repayment over a short period of time (e.g.in 2024, 2032, 2037, 2042).

If interest rates are high at that time, the Council will be exposed to increasing costs which may in turn create pressure on the revenue budget.

Note that the spike in debt falling due in 2037 was unavoidable because it relates to borrowing required for refinancing the Housing Revenue Account in 2012 for 25 years.

The reasons for spikes in other financial years will be reviewed periodically to check whether reprofiling is both possible and financially viable. The Council will seek to reduce maturity profile risk by borrowing in those years in which it has little or no borrowing at present and the borrowing cost represents value for money.

In the 6 months from October 2023 to March 2024, loans of £37 million will need to be re-financed by Bury and this may increase to £45 million if Dexia call the LOBO for £8 million on the due date of 27th March 2024.



Time periods start on the first day of each financial year. The maturity date of borrowing is the earliest date on which the lender can demand repayment.

The upper and lower limits on the maturity structure of all borrowing will be defined in Bury's Treasury Management Strategy for 2024/25. This will help reduce the Council's exposure to refinancing risk in future years.

Monitoring of the value-weighted average [credit rating] *or* [credit score] of the investment portfolio is calculated by applying a score to each investment (AAA=1, AA+=2, etc.) and taking the arithmetic average, weighted by the size of each investment. Unrated investments are assigned a score based on their perceived risk.

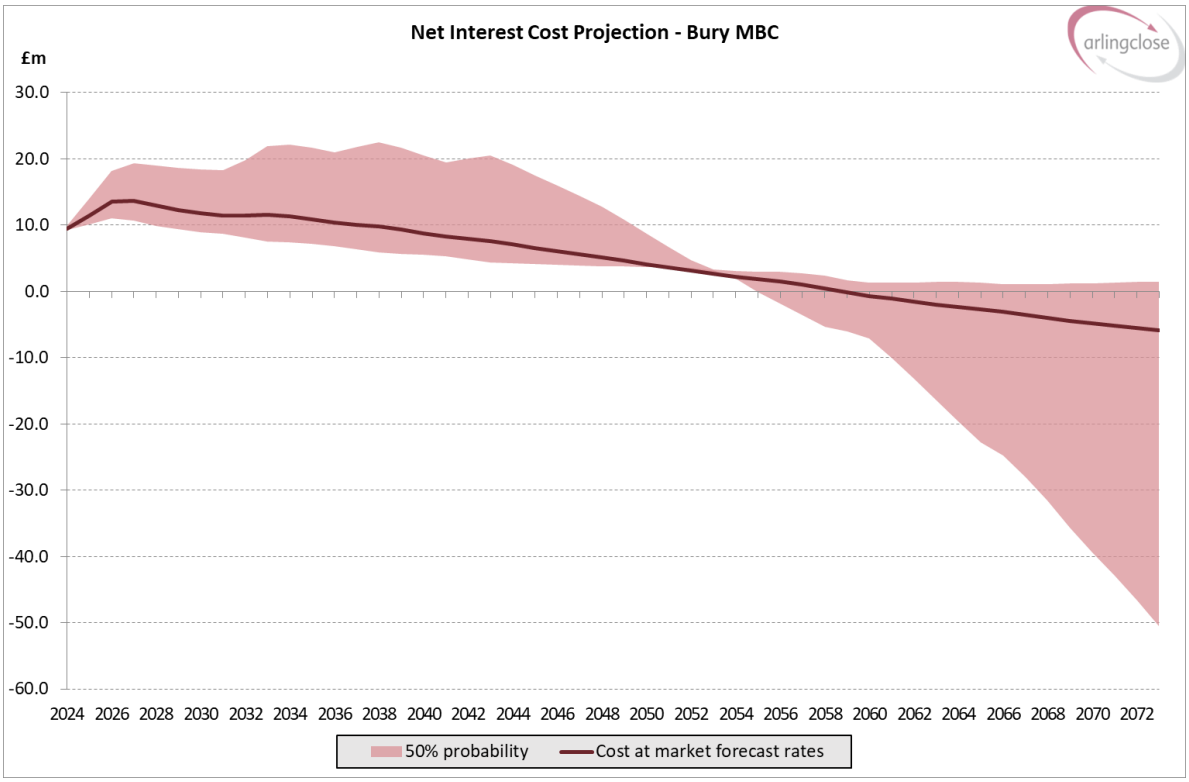
Interest Rate Exposures: This indicator is set to control the Authority's exposure to interest rate risk. Bank Rate rose by 1% from 4.25% on 1st April to 5.25% by 30th September.

Interest rate risk indicator	**2023/24 Target**	**30.9.23 Actual**	**Complied?**
Upper limit on one-year revenue impact of a 1% rise in interest rates			
Upper limit on one-year revenue impact of a 1% fall in interest rates			

For context, the changes in interest rates during the period were:

	31/3/23	30/9/23
Bank Rate	4.25%	5.25%
1-year PWLB certainty rate, maturity loans	4.78%	5.69%
5-year PWLB certainty rate, maturity loans	4.31%	5.22%
10-year PWLB certainty rate, maturity loans	4.33%	5.26%
20-year PWLB certainty rate, maturity loans	4.70%	5.64%
50-year PWLB certainty rate, maturity loans	4.41%	5.43%

The impact of a change in interest rates is calculated on the assumption that maturing loans and investments will be replaced at new market rates.



APPENDIX A

FURTHER DETAIL FROM THE ARLING CLOSE REPORT ON THE ECONOMIC CONDITIONS AFFECTING BURY'S BORROWING AND INVESTMENTS.

Economic background

UK inflation remained stubbornly high over much the period compared to the US and euro zone, keeping expectations elevated of how much further the Bank of England (BoE) would hike rates compared to the regions. However, inflation data published in the latter part of the period undershot expectations, causing financial markets to reassess the peak in BoE Bank Rate. This was followed very soon after by the BoE deciding to keep Bank Rate on hold at 5.25% in September, against expectation for another 0.25% rise.

Economic growth in the UK remained relatively weak over the period. In calendar Q2 2023, the economy expanded by 0.2%. However, monthly GDP data showed a 0.5% contraction in July, the largest fall to date in 2023 and worse than the 0.2% decline predicted which could be an indication the monetary tightening cycle is starting to cause recessionary or at the very least stagnating economic conditions.

July data showed the unemployment rate increased to 4.3% (3mth/year) while the employment rate rose to 75.5%. Pay growth was 8.5% for total pay (including bonuses) and 7.8% for regular pay, which for the latter was the highest recorded annual growth rate. Adjusting for inflation, pay growth in real terms were positive at 1.2% and 0.6% for total pay and regular pay respectively.

Inflation continued to fall from its peak as annual headline CPI declined to 6.7% in July 2023 from 6.8% in the previous month against expectations for a tick back up to 7.0%. The largest downward contribution came from food prices. The core rate also surprised on the downside, falling to 6.2% from 6.9% compared to predictions for it to only edge down to 6.8%.

The Bank of England's Monetary Policy Committee continued tightening monetary policy over most of the period, taking Bank Rate to 5.25% in August. Against expectations of a further hike in September, the Committee voted 5-4 to maintain Bank Rate at 5.25%. Each of the four dissenters were in favour of another 0.25% increase.

Financial market Bank Rate expectations moderated over the period as falling inflation and weakening data gave some indication that higher interest rates were working. Expectations fell from predicting a peak of over 6% in June to 5.5% just ahead of the September MPC meeting, and to then expecting 5.25% to be the peak by the end of the period.

Following the September MPC meeting, Arlingclose, the authority's treasury adviser, modestly revised its interest forecast to reflect the central view that 5.25% will now be the peak in Bank Rate. In the short term the risks are to the upside if inflation increases again, but over the remaining part of the time horizon the risks are to the downside from economic activity weakening more than expected.

The lagged effect of monetary policy together with the staggered fixed term mortgage maturities over the next 12-24 months means the full impact from Bank Rate rises are still yet to be felt by households. As such, while consumer confidence continued to improve over the period, the GfK measure hit -21 in September, it is likely this will reverse at some point. Higher rates will also impact business and according to S&P/CIPS survey data, the UK manufacturing and services sector contracted during the quarter with all measures scoring under 50, indicating contraction in the sectors.

The US Federal Reserve increased its key interest rate to 5.25-5.50% over the period, pausing in September following a 0.25% rise the month before, and indicating that it may have not quite completed its monetary tightemrpning cycle.

Having fallen throughout 2023, annual US inflation started to pick up again in July 2023, rising from 3% in June, which represented the lowest level since March 2021, to 3.2% in July and then jumping again to 3.7% in August, beating expectations for a rise to 3.6%. Rising oil prices were the main cause of the increase. US GDP growth registered 2.1% annualised in the second calendar quarter of 2023, down from the initial estimate of 2.4% but above the 2% expansion seen in the first quarter.

The European Central Bank increased its key deposit, main refinancing, and marginal lending interest rates to 4.00%, 4.50% and 4.75% respectively in September, and hinted these levels may represent the peak in rates but also emphasising rates would stay high for as long as required to bring inflation down to target.

Although continuing to decline steadily, inflation has been sticky, Eurozone annual headline CPI fell to 5.2% in August while annual core inflation eased to 5.3% having stuck at 5.5% in the previous two months. GDP growth remains weak, with recent data showing the region expanded by only 0.1% in the three months to June 2023, the rate as the previous quarter.

Financial markets

Financial market sentiment and bond yields remained volatile, with the latter generally trending downwards as there were signs inflation, while still high, was moderating and interest rates were at a peak.

Gilt yields fell towards the end of the period. The 5-year UK benchmark gilt yield rose from 3.30% to peak at 4.91% in July before trending downwards to 4.29%, the 10-year gilt yield rose from 3.43% to 4.75% in August before declining to 4.45%, and the 20-year yield from 3.75% to 4.97% in August and then fell back to 4.84%. The Sterling Overnight Rate (SONIA) averaged 4.73% over the period.

Credit review: Having completed a review of its credit advice on unsecured deposits at UK and non-UK banks following concerns of a wider financial crisis after the collapse of Silicon Valley Bank purchase of Credit Suisse by UBS, as well as other well-publicised banking sector issues, in March Arlingclose reduced the advised maximum duration limit for all banks on its recommended counterparty list to 35 days. This stance continued to be maintained at the end of the period.

During the second quarter of the period, Moody's revised the outlook on Svenska Handelsbanken to negative from stable, citing concerns around the Swedish real estate sector.

Having put the US sovereign rating on Rating Watch Negative earlier in the period, Fitch took further action in August, downgrading the long-term rating to AA+, partly around ongoing debt ceiling concerns but also an expected fiscal deterioration over the next couple of years.

Following the issue of a Section 114 notice, in September Arlingclose advised against undertaking new lending to Birmingham City Council, and later in the month cut its recommended duration on Warrington Borough Council to a maximum of 100 days.

Arlingclose continued to monitor and assess credit default swap levels for signs of ongoing credit stress and although no changes were made to recommended durations over the period, Northern Trust Corporation was added to the counterparty list.

Heightened market volatility is expected to remain a feature, at least in the near term and, as ever, the institutions and durations on the Authority's counterparty list recommended by Arlingclose remains under constant review.

Appendix B:

Approved Lending List Criteria: Bury Council Durational and Money Limits applying to Specific and Non-Specified Investments

Treasury Management Practice (TMP1) – Credit and Counterparty Risk Management

SPECIFIED INVESTMENTS: All such investments will be sterling denominated, with **maturities as specified in the table below**, meeting the minimum 'high' quality criteria where applicable.

NON-SPECIFIED INVESTMENTS: These are any investments which do not meet the specified investment criteria. A maximum of 100% will be held in aggregate in non-specified investment

A variety of investment instruments will be used, subject to the credit quality of the institution, and depending on the type of investment made it will fall into one of the above categories.

The criteria, time limits and monetary limits applying to institutions or investment vehicles are:

Counterparty	Minimum credit criteria / colour band	Short Term Fitch/Long Term MoodyRating	Max £ limit per institution	Arling Close Duration	Maximum Maturity Period
Debt Management Office Deposit Facility (DMADF)– UK Government	yellow	F1+u/Aa3	Unlimited	50 years	50 years

UK Banks Term Deposits		F1/A1	£25 million	6 months	35 days
UK Local Authorities		F1/A1	£20 million	2 years+	2 years
UK Building Societies		F1/A1	£20 million	1 year	35 days
Unrated Affiliated Bodies working capital *		N/A	Subject individual circumstance	Case by Case	N/A
Unrated Affiliated Bodies Capital Expenditure Loan *		N/A	Subject individual circumstance	Case by Case	N/A

- Unrated affiliated bodies such as: arm's length companied, wholly owned subsidiaries, joint ventures, registered providers, service providers.

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Appendix 4

National Non-Domestic Rates debt write offs

The following 12 business rates accounts require Cabinet approval for write off as they are over £50,000 in value. A number of the accounts span multi years and all have been pursued through the various debt recovery processes of the Council.

Members will be aware that during the pandemic all Councils were unable to pursue any recovery action through the courts or external enforcement agents and as a consequence following the pandemic there was an increase in the volume and value of debt and the number of businesses who became non-payers. This cessation of debt collection by creditors along with the mid and post pandemic economic downturn, is also likely to have led to a delay and an increase in the number of businesses applying for bankruptcy or going through insolvency procedures.

Due to the age of this debt all of it is fully provided for within the bad debt provision and therefore there is no impact on the in year position.

Debt Value	Liability Year	Write Off Reason
£93,546.23	2018-2022	Bankruptcy/Administration/Liquidation
£82,718.42	2019-2020	Bankruptcy/Administration/Liquidation
£79,474.76	2012-2017	Bankruptcy/Administration/Liquidation
£76,987.68	2011-2017	Bankruptcy/Administration/Liquidation
£73,260.00	2016-2017	Not viable to collect (Advice from Legal)
£70,013.37	2018-2020	Bankruptcy/Administration/Liquidation
£69,658.27	2012-2017	Bankruptcy/Administration/Liquidation
£69,268.00	2015-2017	Bankruptcy/Administration/Liquidation
£64,565.00	2017-2019	Bankruptcy/Administration/Liquidation
£59,020.54	2011-2013	Bankruptcy/Administration/Liquidation
£58,699.00	2019-2020	Bankruptcy/Administration/Liquidation
£53,525.33	2018-2019	Not viable to collect (Advice from Legal)

Reason	Number Of Accounts	Debt Value
Bankruptcy/Administration/Liquidation	10	£723,951.27
Not viable to collect (Advice from Legal)	2	£126,785.33
Total	**12**	**£850,736.60**

Procedures have been put in place within the service to bring forward write off requests for Business Rates and Council Tax on a quarterly basis. This will ensure that write offs and the necessary governance that entails is performed in a timely manner to prevent large volumes of unviable debt building in the debt profile.

Improvement measures are also currently being implemented within the service which will support more expedient and efficient collection and recovery processes, helping to mitigate against aged debts being rendered uncollectible due to subsequent insolvency of the business. This is in parallel with the new pathway that seeks to ensure all businesses are claiming all grants and subsidies that they are entitled to thereby reducing their liability.

Agenda Item 8

Classification:	Decision Type:
Open	Non-Key

Report to:	Cabinet	**Date:** 07 November 2023
Subject:	Radcliffe regeneration, interim service arrangements	
Report of	Leader and Cabinet Member for Strategic Growth	

1 Summary

1.1 The Radcliffe Regeneration Framework is a plan to invest in new facilities in the Town. This includes the construction of a new school, the opening of a new Leisure Centre and Library as part of the new Radcliffe Hub and the redevelopment of the current Radcliffe Library into an Enterprise Centre. Overall, this represents a welcome improvement to service provision and is a significant investment to the Town.

1.2 This report is an update on the interim service arrangements required in Radcliffe to enable the implementation of these schemes.

1.3 Vacant possession of the Spring Lane site is required by March 1st so that work can begin on the construction of the new school. The affected services are the Leisure Centre and the Pupil Referral Unit. (PRU). The Leisure Centre will need to close on 10th December 2023 to meet this requirement and the PRU will need to vacate their site during February half term 2024. Any delay is vacating the Spring Lane site will attract a financial penalty for the Council of £2.4m.

1.4 A grant from UKSPF will enable the redevelopment of Radcliffe Library into an Enterprise Centre by April 2025. There will be some disruption to Library Services whilst the construction work is undertaken in 2024 and during the decant from the current building to the Hub between April 2025 and Autumn 2025. A further report will be brought forward once more details about construction and decant are known following the December 2023 Regeneration Board.

1.5 A full programme plan for Radcliffe will be produced before Christmas setting out all the interdependencies, affected staff will be briefed beforehand and a full communications plan with be developed to keep service users, residents, Members, and staff informed of progress.

2 Recommendation(s)

That Members agree the following:

2.1 Agree that the Leisure Centre in Radcliffe will close on 10th December 2023 to enable the handover of the site for the construction of the new school on the Spring Lane site.

2.2 To note the temporary arrangements which will be put in place prior to the opening of the new leisure facility in Radcliffe in late 2025.

2.3 To note that the PRU will vacate the Spring Lane site in February half term 2024 and options to proceed with alternative arrangements are underway and will be approved subject to further work on costs and programme planning. A further report will be brought forward once this work is completed.

2.4 To note recent progress with the development of the Enterprise Centre and a proposal to bring forward a further report setting out details of decant and library services.

3 Reasons for recommendation(s)

3.1 Any delay is vacating the Spring Lane site will attract a financial penalty for the Council of £2.4m.

3.2 Various options have been explored to re-provide a full-time sports hall and gym in Radcliffe and the service has worked closely with local Members and the community and voluntary sector to identify suitable locations. This has not been possible as the community venues are required for other activities throughout the week such as church services and it would not be possible to move the gym equipment to accommodate.

3.3 It is not possible or affordable to re-provide a temporary swimming pool in Radcliffe.

3.4 The new Community Wellness Activity Plan is an appropriate next step following the development of the 2023 Wellness Strategy and is an excellent demonstration of the ambitions of the Let's do it Strategy, working together to deliver for the local community.

3.4 The PRU will need to vacate the site during February half term 2024 to hand over the site for the construction of the school. The option to relocate to Spurr House has proved too expensive and not achievable within the timescales so further options are under discussion.

3.5 The financials have been agreed to turn the current Radcliffe Library into an Enterprise Centre by April 2025 and the work is underway to tender for a construction partner and operator. When the construction programme is agreed a further report will be brought forward after December 2023 Regeneration Board to set out the operational impact on the current Library.

4 Alternative options considered and rejected.

4.1 An options appraisal was carried out looking at assorted options to re-provide the sports hall and gym in community venues and by renting or buying a portable building, but this proved to be unaffordable in the current climate, there was a lack of available alternative sites and a shortage of portable buildings nationally due to RAAC issues elsewhere in the UK.

4.2 An alternative long-term option for the PRU relocation was considered at Spurr House although costs have risen significantly against the Cabinet approved budget. This option has been discounted as a short-term solution as the construction programme does not align with offering vacant possession of Spring Lane to the DfE.

4.3 An options appraisal was carried out looking at potential alternative locations for the library once the construction work on the Enterprise Centre commences. It has not been possible to identify a vacant building in Radcliffe that is large enough or at an affordable price to relocate the whole library to. Options around providing a portable building on the car park were investigated but there is a lack of availability of these buildings nationwide due to the current RAAC crisis in schools across the Country and the costs were unaffordable. The architect and developer will work up a series of options for the December 2023 Regeneration Board for the continuation of Library Services in conjunction with the Library Service during this period.

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Background

5 New school

5.1 Bury Council, working with Star Academy and the Department for Education, (DfE), continue to progress plans that will see the establishment of the Star Leadership Academy, Radcliffe's new secondary school. Star Academy Radcliffe have appointed a principal Designate for the school who will attend the Bury Secondary Headteacher meetings. The school is on track to open in temporary accommodation for September 2024 and then into its permanent home by September 2025.

5.2 The new school will be built on the site of the former Coney Green High School at Spring Lane. The council has recently approved admission arrangements for its secondary schools for the 2024/25 academic year, including the arrangements that will apply for the new school.

5.3 Construction is expected to start on site in late 2023. The school will open to its first group of year 7 pupils in September 2024. The construction of the new school in Radcliffe on the Spring Lane site requires the relocation and reprovision of both the Leisure Centre and the PRU. The Department for Education (DfE) have confirmed that they require vacant possession of the Spring Lane site to make way for the demolition of the existing buildings starting in Spring 2024, that will make way for the construction of the new Radcliffe Academy. There is a financial penalty of £2.4m if vacant possession is not offered up on the 1st March 2024.

6 Leisure Centre

6.1 Improved Leisure facilities have been planned to open at the new Radcliffe Hub in late 2025. This will provide a state-of-the-art gym, studio space and a rooftop fitness space as well as swimming facilities, a changing village, library, café, community meeting space and a clip 'n' climb centre. A new secondary school will open in 2024 and the current Library will be repurposed into an Enterprise Centre. This represents a huge investment and improvement in services for the town.

6.2 A two-month period is required to decommission the existing leisure centre buildings including closing down all services, removal and storage of equipment, fixtures, and fittings to be retained as well as relocating where possible, existing customers and user groups. A separate decommissioning plan is being prepared to oversee the decommissioning tasks.

6.3 An options appraisal was developed to see whether the gym, sports hall, fitness, and wellness provision could be retained in Radcliffe until the new Hub opens in late 2025. It was assumed that a temporary swimming pool could not be provided due to costs. The swimming pool at Radcliffe Leisure Centre closed on 25th August due to on-going maintenance and repair issues which were becoming too costly to maintain in the short term. Alternative arrangements to relocate swimming provision to Ramsbottom and Castle Leisure Centres have been made available and Radcliffe Swimming Club have agreed to relocate to Castle Leisure Centre in the interim period. Community Learn to Swim and school swimming lessons are also being re-provided.

6.4 In order to vacate the site for the school by 1st March 2024, it is recommended that the remaining gym, studios, and sports hall at the Leisure Centre close on

10th December 2023 to give enough time to vacate the building and hand it over. It has not been possible to identify an alternative site in Radcliffe for the sports hall and gym and additional provision at Castle Leisure Centre will be provided including an additional female only space which will reduce the costs of storage of gym equipment.

6.5 Bury Council has developed a Wellness Strategy in partnership with Sport England. This is a groundbreaking innovative approach to getting inactive people moving more and participating in preventative health programmes which reflects the Sport England Future of Public Leisure Report 2023. Delivery is through four new neighbourhood Wellness Teams which will go live on 13th November 2023. The teams will work with the community, faith, and voluntary sector as well as other partners particularly in the NHS to deliver a full and enriched programme of activities in community settings.

One of the neighbourhood Teams will be based in Radcliffe which will enable wellness and fitness services to remain in Radcliffe. This will be a full programme of activity spread across seven days at convenient community locations. Venue hire will be at no additional cost to the Council and will be funded by the participation fees for each session. We would like to thank various organisations in Radcliffe that have tried to accommodate us including Radcliffe Football Club and several Churches. We will work with these organisations to deliver the Community Wellness Activity Plan.

6.6 It is proposed that a communication plan will be put in place as soon as possible.

- All leisure members will be notified by email and the planned closure will be highlighted via the website and Bury Leisure phone lines and social media channels.
- Draft copy is ready for the regeneration newsletter which will be published the week commencing 20th Nov.
- A meeting has taken place with Leisure Centre staff with support from HR and the TU and there will be a further meeting with Radcliffe Library staff on 31st October.
- The next meeting of the Radcliffe Regeneration Forum is on 14th November.

7. The Pupil Referral Unit

7.1 The current PRU is also located on the Spring Lane site. This site will have to close during February half term 2024 and the operation moved to another site to allow vacant possession to be offered up to the DfE. A project to relocate the PRU function to Spurr House in Unsworth has been ongoing although has been affected by increasing costs and programme delays.

7.2 To facilitate the relocation of the Pupil Referral Unit, plans had been developed and dialogue advanced for the procurement of a preferred contractor to convert the Council owned Spurr House site. Walker Sime Consultancy were appointed to do a project review and their report was received in October 2023. The main findings were that the project was not deliverable within the required timescale or affordable against the budget. Following advanced dialogue and discussion, it has become clear the necessary construction work at Spurr House cannot be completed in the timescales required.

7.3 The Land and Property Team have explored several alternative sites across the Council owned portfolio. Further options are being reviewed for the development of an interim facility with the senior leadership team of Oak Learning Partnership, the identified sponsor for the Spring Lane PRU. A further report will be brought back to Cabinet with a proposal for this site.

8. The Enterprise Centre

8.1 The scheme aims to convert Radcliffe Library, located within Radcliffe Town Centre and adjacent to the Levelling Up regeneration activity (part of the Radcliffe Regeneration Framework) to a flexible, multi-functional Enterprise Centre. The space will provide a range of private offices and bookable hot desks to facilitate up to 100 occupiers. The end goal is to create a vibrant, flexible space that will enhance footfall in Radcliffe Town Centre further igniting additional investment into a location on the cusp of reinvention. This will nudge further investment and confidence in the town, providing additional business rates revenue to the Council and a reason to visit and invest in Radcliffe for businesses and house builders. Nine out of ten Bury businesses employ less than nine people and whilst there is some private provision in Bury, this is in high demand. The Council-owned Bury Business Centre is also almost fully occupied, further demonstrating demand to support additional small-scale workspace. A pivotal part of Radcliffe's levelling up ambitions are to increase footfall in the town centre where businesses have access to required services.

8.2 Community access to the facility will be a key element of the project and bookable meeting space will be available to rent by both business and community users, subject to funding outputs requirements (businesses supported) being met in the first instance.

8.3 A grant from UKSPF and investment from Bury Council will enable the redevelopment of Radcliffe Library into the Enterprise Centre by April 2025. There will be some disruption to Library Services whilst the construction work is undertaken and during the decant from the current building to the Hub. A further report will be brought forward following the December 2023 Regeneration Board with options to ensure the continuation of the Library Service during this time.

8.4 The construction programme is planned to begin in September 2024 for a 24.5-week programme of work. Site mobilisation and any required library decant should commence in August 20024. Two options are being considered and costed for the library during this period. Working with the construction contractor, once we have more detail on the construction methodology, we will consider whether we can retain partial opening hours/days for the library by dividing the ground floor into two halves via an acoustic wall. Secondly, we will seek to use any available space in the existing Market Hall for parts of the library, including options potentially to move the children's library there in the interim.

8.5 These are high level proposals now and will require a more detailed construction programme and discussions with the Library Service and the impact of the work on the service before any decisions can be taken. There will be discussions with stakeholders including:

- Internal design phase including engagement with library staff and Members.
- Internal sign off at the December 2023 Regeneration Board
- Public consultation which will be promoted across all communication channels including the Radcliffe Regeneration newsletter.

8.6 There may be disruption to the library once the Enterprise Centre opens in April 2025 until the new Radcliffe Hub opens in Autumn 2025 although this period coincides with the period the library would have been packing up and decanting from the current building to the Hub.

9 Links with the Corporate Priorities:

9.1 The new draft Community Wellness Activity Plan is a comprehensive programme of activities, support, and access to services across the entire week in Radcliffe. The principle is to use the LET's Strategy to bring together in one place, what is happening across Radcliffe and across all areas of wellbeing.

9.2 Using the LET's principles the Activity Plan, led by the Radcliffe Wellness Team will show how the community, Council and NHS partners are working **together** to get moving more, what sessions need support and what sessions need to be provided. The Radcliffe Wellness Team will bring that specialist knowledge, such as getting blood pressure checks, smoking cessation advice, grant finding/applying and act as local co-ordinator with partners across the NHS and social prescribing.

9.3 The hire of community venues to deliver the Plan's activities will bring a spotlight to community venues and income generated from venue hire. This will support the voluntary, community and faith organisations to directly benefit

from the programme, build on their **strengths** and further anchor them into the life of the Town.

9.4 The development of the Enterprise Centre will focus on the **Enterprise and strengths** principles and provide managed workspace and business support within a local neighbourhood. This will provide opportunities for community wealth building through new business start-ups, increased local spend and the adoption of new skills.

9.5 The relocation of the PRU will enable the construction of the secondary school. This will in turn provide employment opportunities for local people and bring enhanced secondary school facilities to Radcliffe.

10 Equality Impact and Considerations:

10.1 A draft EA is available for the Leisure interim arrangements. Whilst there will be some disruption to the provision of Leisure Services during this interim period, Radcliffe Swimming Club, community learn to swim and school swimming can be re-provided at other pools and discussions have taken place with stakeholders to deliver this. Additional female only gym provision will also be made available at Castle Leisure Centre using some of the gym equipment currently at Radcliffe. This will enhance provision in response to protected characteristics around gender and race. The development of the Community Wellness Activity Plan will provide new and enhanced Wellness activities in Radcliffe which will reach more people and support residents to be more active and healthier.

10.2 EAs for the relocation of the PRU and the development of the Enterprise Centre will follow as part of the reports that will be brought forward later.

11 Environmental Impact and Considerations:

11.1 Bury Council has a pledge to be Zero Carbon by 2038. This means that the current estate needs to be rationalised and modernised. This Enterprise Centre scheme presents the opportunity to introduce a flexible and innovative workspace into the heart of a highly sustainable town-centre, reducing the need to commute to a place of work. The library building itself is of a certain age and the opportunity for refurbishment and redevelopment will enable the estate to reduce its carbon footprint over time.

11.2 The closure of the current Leisure Centre provision will reduce the amount of energy expended on site and the reprovision of fitness and wellness activities in Radcliffe within walking distance of residents' homes will increase the amount of active travel in the Town with no need to travel to Ramsbottom or Castle Leisure Centres.

11.3 The environment impact of the new school has been set out in previous

reports to Cabinet.

12 Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
There is a risk of a DfE fine if the Spring Lane site is not vacated by 1st March 2024	Plans are in place to vacate the Leisure Centre on time and work is underway to progress the interim site of the PRU. Strong programme management will be required and close attention to progress monitored at the Regeneration Board.
There is a risk that a solution cannot be found for the interim continuation of Library Services during the construction period for the Enterprise Centre	Mitigations can be put in place once the construction methodology is known, and options will be brought to the December Regeneration Board.

13 Legal Implications:

Failure to vacate the site will result in a financial penalty for the Council, Members are asked to agree to the closure date of 10th December to facilitate vacant possession of the site. Earlier agreements with the DfE which have been reported to Cabinet penalties will be incurred if we cannot meet the terms of this agreement. Cabinet will receive further reports in relation to the proposed Enterprise Centre and library pre provision.

14 Financial Implications:

There is a financial penalty of £2.4m if the site for the new school is not vacated by the 1st March 2024 therefore it is essential that this work is progressed. Previous reports have been brought to Cabinet with indicative budgets for the refurbishment of Spurr House to accommodate the relocation of the PRU. This budget is still within the Education capital programme until the final solution and costs are confirmed.

The costs of the works required for the Enterprise centre are funded through a UK shared prosperity fund grant and the Council Capital programme, any additional costs required to decant the library during the works will be worked up and brought forward to the Regeneration Board in December 2023. This will require the identification of additional funding.

15 Appendices:

None

16 Background papers:

None

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

Term	Meaning
PRU	Pupil referral Unit
DfE	Department for Education
UKSPF	UK Shared Prosperity Fund
EA	Equality Assessment
RAAC	Reinforced Autoclaved Aerated Concrete

Agenda Item 9

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 07 November 2023
Subject:	Mill Gate Strategic Regeneration Framework	
Report of	Leader and Cabinet Member for Strategic Growth	

Summary

1.1 The Council acquired the Mill Gate shopping centre and wider estate in April 2022 with Joint Venture (JV) partner Bruntwood. The site was acquired to operate the asset and develop it for the future.

1.2 Following Cabinet approval (July 2023) to undertake initial public and stakeholder engagement and thereafter to develop a draft Strategic Regeneration Framework, this work has been undertaken by the Mill Gate Joint venture.

1.3 A draft SRF document has therefore been produced which as stated in the earlier cabinet report will provide a greater level of structure and flexibility to govern the development process for the Mill Gate.

Recommendation(s)

It is recommended that Cabinet:

2.1 Provide approval for the Mill Gate JV to carry out a formal period of public and stakeholder consultation on the draft strategic regeneration framework.

2.2 Note that following the public and stakeholder consultation, a full review of consultation feedback will be undertaken and required amendments will be made before the Strategic Regeneration Framework is brought back to Cabinet for formal adoption in Spring 2024.

Reasons for recommendation(s)

3.1 It is important for the JV to continue to engage with the Public and other stakeholders in order to refine the emerging vision for the Mill Gate estate via the Strategic Regeneration Framework.

3.2 Public and Stakeholder consultation and development of the Strategic Regeneration Framework for Mill Gate enables large scale development to progress in accordance with the emerging vision of the Mill Gate Joint Venture vehicle and the strategic objectives set out during the acquisition of the asset.

Alternative options considered and rejected

4.1 Not Applicable

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Background

5.1 The Council acquired the Mill Gate Shopping Centre and wider estate alongside joint venture (JV) partner Bruntwood in April 2022 following approval by Cabinet in November 2021.

5.2 A competitive tender exercise was undertaken by the JV concluding in August 2022 to secure the services of an architectural and master planning consultant. BDP Architects were successful in this tender process, and they were instructed to undertake a review of the Mill Gate estate and establish a vision and highlight opportunities to unlock the potential for the Mill Gate and secure its long-term future.

5.3 The architect's brief was clear in its direction to consider the pre-existing Bury Town Centre Masterplan and the principles of the Councils Vision 2030, 'Let's Do It!' strategy, in addition to statutory and best practice design guidance.

5.4 The work undertaken to date has involved local stakeholders and Council officers to provide a clear ambition and delivery plan for the introduction of new homes but also to deliver a sustainable town centre retail asset for the future. The reimagined Mill Gate will add to the existing town centre and create space that local people will be proud of, and visitors will be keen to use.

5.5 The proposed regeneration of the Mill Gate Estate is highly aspirational and over the next 15 – 20 years will enable the delivery of a successful new neighbourhood for Bury. This has the potential for the joint venture to deliver one of the North West's most ambitious regeneration projects.

5.6 Permission was granted by Cabinet in July 2023 for the JV to undertake engagement activity over the summer period to introduce the emerging masterplan for the Mill Gate estate and the associated development principals.

5.7 Cabinet also approved the JV to procure resources to deliver a draft Strategic Regeneration Framework for the Mill Gate estate. This draft document has now been completed and is appended to this report. Public engagement events took place in the Mill Gate on 21st and 22nd July 2023. A retailer event briefing was also held prior to this. The objectives of this were centred around visioning and undertaking a listening exercise. The feedback from these events has been collated and represented within the draft regeneration framework. The engagement event was well attended, and JV representatives spoke to many members of the public who completed surveys on site or took away paper surveys. An online survey sat alongside the engagement events.

5.8 Future engagement and consultation will be undertaken in line with the joint venture consultation strategy and plan which has been directly informed by the Council Statement of Community Involvement (2023).

Links with the Corporate Priorities:

6.1 The evolving vision for the Mill Gate leans heavily on the 'Let's do it!' strategy and aspirations. It also directly refers to other projects currently in development or delivery in the town, defined and managed under the Bury Town Centre Masterplan. Significant input has been received from a variety of stakeholders and there has been particular reference to the Council's Housing Needs and Demand Assessment, community strategies and inclusive growth agenda.

6.2 The regeneration of Bury Town Centre supports delivery of the 'Let's Do It!' strategy and the five themes that underpin this vision. 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. The five themes are summarised below and how they link into the vision for Bury Town Centre:

- **Healthy Communities**: The acquisition of the Mill Gate provides options for providing new community infrastructure including adult learning, civic facilities and other health related services will be a true connection to the community. The implementation of active travel, walking and cycling routes connecting people with local amenities and increasing the availability of public open space will enable the community in Bury Town Centre and surrounding suburban to reconnect and thrive.

    - **Carbon neutral**: We need to use every opportunity to ensure that development in Bury Town Centre on our land is carbon neutral and prioritises active travel.

- **Inclusion**: making sure that everyone's voice is heard, this will absolutely be a focus through the consultation of the regeneration work.

- **Digital first**: the full fibre roll out has enabled access to faster speeds and future-proofed infrastructure. This presents an excellent opportunity for the businesses and community with Bury Town Centre being the ideal location to cultivate new business growth, encourage start up SMEs, promote digital growth, and deliver tech enabled employment space.

- **Inclusive Growth**: the regeneration scheme at the Mill Gate in Bury Town Centre will include investment in physical infrastructure (roads, cycle ways and public transport); creating more flexible and innovative/digital workspaces to encourage more businesses to open and remain in Bury; to ensure residents have the best chance to access good jobs.

Equality Impact and Considerations:

7.1 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:

- Eliminate discrimination, harassment, victimisation, and any other conduct that is prohibited by or under this Act.
- Advance equality of opportunity between persons who share a relevant protected characteristic and persons who do not share it.
- 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. If proposals are brought forward to Cabinet in due course for comprehensive redevelopment, a full resident and wider community engagement strategy will be included.

7.2 An Equality Impact Assessment (EIA) will be developed alongside the creation of the Strategic Regeneration Framework document and will be updated as the regeneration project moves forward. The EIA will be made available for the consideration of Elected Members when approval is sought from Cabinet to adopt the SRF itself. The overall vision for the Mill Gate development is to deliver inclusive growth opportunities for Bury residents and the development process will adhere to specific duties required under the Equality Act 2010, alongside related statute, and policies.

Environmental Impact and Considerations:

8.1 The Council has a pledge to be Zero Carbon by 2038. This means that the current estate needs to be rationalised and modernised.

8.2 Bury Town Centre is a highly sustainable location, with a major transport interchange which links to the 100-station Manchester Metrolink system, the town centre is also a major bus hub for north Greater Manchester and contains cycling and walking infrastructure. The Mill Gate Estate itself is on a 15.2-acre brownfield site in the centre of the town. This presents the opportunity to introduce a significant residential capacity in the heart of a highly sustainable town-centre, one which is not car-dependent. The Centre itself is of a certain age and the opportunity for refurbishment and redevelopment will enable the estate to reduce its carbon footprint over time.

8.3 Sustainability remains a key theme for the joint venture, and this runs through the work undertaken as part of the SRF. There is the opportunity to repopulate the town centre and promote sustainable town centre living.

8.4 Along with environmental consideration of new build accommodation there is the opportunity to decarbonise existing buildings within the Mill Gate estate.

Assessment and Mitigation of Risk:

9.1 The development of the SRF will advance the design and business justification for investment in the Mill Gate asset. This will guide the delivery strategy for the development. The creations of the SRF does not pose a risk to the overall project, although the additional development/design activity will be used to identify specific risk(s) to regeneration delivery and operation of the asset in the medium to long run.

Legal Implications:

10.1 The draft SRF is a non-statutory document so there are no statutorily prescribed procedures for consultation. It is for the Council to determine the most appropriate consultation methods ensuring fairness and compliance with the Council's Statement of Community Involvement.

Financial Implications:

11.1 The strategic regeneration framework seeks to establish the long term vision in order to understand the future development opportunities for the Millgate estate. It is an essential tool to help to inform future decision making by both the joint venture and the Council. These future decisions on any particular developments and subsequent required investments will then be subject to future Cabinet papers and JV Board papers. The Council and the JV will also

seek to secure external funding and grants to support this investment wherever possible.

Appendices:

Draft: Bury Millgate Regeneration Framework

Background papers:

Acquisition of Mill Gate - November 2021
https://councildecisions.bury.gov.uk/ieDecisionDetails.aspx?ID=3667

Bury Town Centre Masterplan – Cabinet March 2022
https://councildecisions.bury.gov.uk/ieListDocuments.aspx?CId=126&MId=3262&Ver=4

Mill Gate Shopping Centre & Estate: Joint Venture update and development principles - Cabinet July 2023

Mill Gate Shopping Centre Estate - Joint Venture update and development principles.pdf (bury.gov.uk)

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

Term	Meaning
SRF	Strategic Regeneration Framework
JV	Joint Venture

bruntwood × Bury Council

Mill Gate.

BURY MILL GATE REGENERATION FRAMEWORK

draft.



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Prepared by | Checked by | Date

P06 // updated draft issue // WL // MB // 27/10/23

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Introduction.

1

1.1 Introduction

1// Mill Gate Entrance (Market Street)
2// Library Gardens
3// Bury Market
4// The Rock Shopping Centre

The Mill Gate Shopping Centre ("the Mill Gate") sits at the very heart of Bury and its successful regeneration will be a major step forward for the Bury Town Centre Masterplan (2022). This Mill Gate Regeneration Framework ("the Framework") seeks to deliver "homegrown" regeneration that builds upon the area's existing strengths and unique assets, capturing the spirit of Bury in plans to revitalise the area.

This will be achieved through physical improvements to buildings and public realm; reconfiguration of the retail offer to make Mill Gate one of Greater Manchester's most attractive shopping and leisure destinations; harnessing and celebrating the local identity and character of the town; and growing the town centre's residential community. In this way, the Mill Gate can create sustainable inclusive growth opportunities for Bury's residents over the short, medium and long term.

The Framework sets out a vision and set of place based regeneration principles that seek to establish the Mill Gate as a vibrant mixed-use hub that meets the needs of the local community and stimulates future investment in the town centre. It also includes an illustrative masterplan, which imagines how the Mill Gate could look in the future if the vision is achieved.

The Framework vision and guiding principles are founded on an in-depth understanding of the Mill Gate, its interface with Bury Town Centre and local communities, and its location within the Borough and Greater Manchester.

This includes recognising and complementing the town centre's existing role and character, including its established retail function, a strong local entrepreneurial spirit epitomised by the nationally recognised Bury Market, rich historic cultural offer of museums and galleries, and strong regional transport connections, which are being enhanced by the new Bury Interchange.

In doing so, the Framework seeks to deliver genuine social and economic benefits for local people, which address the specific challenges and identified needs of the local community. This includes recognising the need to deliver improved local health outcomes; within the context of the Mill Gate's town centre location this requires new, innovative solutions and enhancements to integrate in with the existing infrastructure, such as active travel networks (e.g. Greater Manchester's Bee Network).

The Framework is being brought forward by Bury Metropolitan Borough Council ("the Council") and Bruntwood, who jointly acquired the Mill Gate shopping centre in 2022 ("the JV").









Mill Gate Today

Today, the range of uses and quality of environment in and around the Mill Gate are not maximising the town centre's potential. The Framework Area includes a variety of buildings that have been delivered on a piecemeal basis over the years. This has resulted in a lack of any cohesive architectural quality or style, under-utilised public realm, and poor connections, which collectively undermine the town centre's attractiveness as a place within which the local community and visitors want to spend time.

The current amount of retail floor space within the Framework Area is unsustainable due to the significant shift towards online shopping and new, less traditional, forms of retail and leisure. The area lacks a wider mix of uses and insufficient access to high quality, mixed tenure, multi-generational housing. This limited housing provision prevents the town centre from being a community of choice for those wanting to live in one of Greater Manchester's most vibrant town centres.

1// Parade at The Rock Shopping Centre
2// Parade at The Rock Shopping Centre
3// Bury Market
4// Bury, Mill Gate

The solutions to the full range of challenges and opportunities are multi-faceted and cannot be solved by this Framework alone. However, by identifying key regeneration drivers, the Framework can establish a series of 'golden threads' that run through the vision and objectives, place based principles, and the illustrative masterplan.

Overall, the Framework seeks to establish the long-term vision, objectives and development principles, which will ultimately provide the community with a clear understanding of the future potential for the Mill Gate and inform future decisions by the JV, the Council and those investing in the town centre.









1.2 Purpose of the Regeneration Framework



The Framework area is a prime example of a late 20th century retail development, and this Framework represents a unique opportunity to revitalise the significant, underutilised asset in Bury Town Centre. The purpose of the Framework is summarised as:

A Catalyst for the Town Centre

- The Framework is a central component of delivering Bury's Town Centre Masterplan and supports the Council's aims and objectives around inclusive economic growth in Bury's 2030 Let's Do It! Strategy.
- The Framework has been developed from an in-depth understanding of the Framework area, its interface with Bury Town Centre and local communities, and its location within the Borough and Greater Manchester. It has been directly informed by the Local Development Plan, Places for Everyone and other material considerations such as the Bury Town Centre Masterplan and Bury's Let's Do It! Strategy.

A Long-Term Vision

- The Framework provides a clear long term vision for the Framework area which aligns to key stakeholder expectations, objectives and priorities.
- A range of guiding principles are established within the Framework which underpin the overarching vision and objectives for a future-proofed Mill Gate, that supports the long term vitality Bury Town Centre.

A Guide for Future Development

- The Framework provides the strategic basis to guide the coordinated delivery of future development phases to maximise the environmental, economic and social potential of the town centre.

1.3 Structure of the Regeneration Framework

Report Navigation

This Strategic Regeneration Framework follows the below structure:

Section 01: Introduction

- Sets out the surrounding context and purpose of the SRF, including introducing the Vision and Objectives.

Section 02: Drivers for Regeneration

- An overview of the underlying factors that support the regeneration and investment opportunity.

Section 03: Site Analysis

- A summary assessment of key local considerations that have informed the Framework and will also inform future development proposals.

Section 04: Development Principles

- Outlines the detailed place-based development principles that will guide future development proposals.

Section 05: Illustrative Masterplan

- An indicative representation of how the area could be developed over the regeneration period, including presenting key urban design strategies.

Section 06: Landscape

- An overview of the landscaping and public realm guiding principles.

Section 07: Phasing & Delivery

- Sets out the indicative phasing and delivery strategy for bringing forward future proposals within the Regeneration Framework Area, including identifying key delivery considerations.



1.4 Framework Area

The Framework area covers 10.9 hectares in the heart of Bury Town Centre.

The Framework area is bound by Angouleme Way to the south, Bury Interchange to the southwest, Kay Gardens and Market Street to the west, The Rock to the north, and The Rock Shopping Centre to the east.



Regeneration Framework Extents


Mill Gate.
Key
Mill Gate Regeneration Framework
Bury Town Centre Masterplan
Conservation Area
N


C1
C2
C3

1.5 Challenges

A number of challenges facing Bury Town Centre and the Mill Gate Shopping Centre have been identified and informed by a detailed understanding of the Framework Area and its surrounding context. These challenges have provided the starting point for developing the Framework and its overarching vision, objectives and guiding development principles.

These key challenges are summarised below:

- **Retail** – the existing mix of retail within the Mill Gate is unsustainable, with an oversupply in the value led offer. Data indicates that Bury's town centre offer is only attractive to 25% of Bury's residents. The limited market opening days also means that for large parts of the week (daytime and evening) footfall is therefore reduced.
- **Residential** – Existing lack of housing mix and diversity within the town centre mean that Bury Town Centre is not a desirable location for people to live.
- **Public Realm** – the existing areas of public realm have been delivered on a piecemeal basis, with no underlying strategy. This has resulted in low quality spaces that local residents, workers and visitors only uses these spaces to pass through.
- **Poor Connectivity** – connectivity within the Framework area and beyond to other parts of Bury Town Centre and the surrounding communities is poor. This is exacerbated by a poor quality environment that hinders way finding and legibility.
- **Covered Mall** – the existing Covered Mall within the Mill Gate closes at 7pm which creates a blocker to the town centre, both physically and in terms of the evening economy.









1.6 Opportunities

In response to the challenges facing Bury Town Centre and the Mill Gate Shopping Centre, there is clear, established opportunity to deliver an enhanced and future proofed town centre through the regeneration of the Mill Gate.

A number of key opportunities have been identified:

- **Creation of a Mixed-use hub** – Curate a retail, residential and leisure mix that meets the demands of a broader cross section of Bury's residents and creates a unique and attractive destination for visitors from across the region. This should include introducing varied leisure and F&B operators to support the evening and night time economy, and delivering a variety of new high quality homes to increase the town centre residential population.
- **Improve Local Opportunities and Outcomes** – deliver inclusive growth to support broader social and economic ambitions and opportunities for the community. This includes maximising socio-economic outcomes locally and improving the quality of life of Bury's residents and workers.
- **Catalyst for Future Regeneration** – the Framework represents the first major opportunity to bring forward catalytic investment in the Town Centre. It will align with improvement plans at the Interchange and will form the basis for enhancing connections with the wider town centre in all directions.
- **Celebrate the Market** – recognise the important role of the market as a key part of Bury's heritage and identity. Enhancing the surrounding environment to support the market's long term success through delivery of a complementary retail offer.
- **Improving the Built Environment** – deliver future development phases that are aligned with a cohesive masterplan and support the creation of one of the most attractive town centres in Greater Manchester. Provide attractive, safe and accessible routes and public spaces.











1.7 The Vision + Objectives



To enhance Bury Town Centre's role as a mixed use hub for the Borough and Greater Manchester that: supports local business and enterprise; fosters strong local identity and civic pride; meets the needs of the local community; delivers attractive and well connected spaces; and attracts investment to deliver sustainable and inclusive growth.

The Vision and it's supporting objectives provide the golden thread running through the Framework. The key objectives underpinning the Vision are as follows:

1. Deliver **inclusive growth** that seeks to maximise opportunities and social outcomes for Bury's residents.

2. Embed **environmental sustainability** into the design delivery and long term operation of Mill Gate.

3. Increase and **enhance the housing offer** to support a vibrant residential community in the heart of the town centre, whilst knitting in with the existing local communities.

4. Refresh and **diversify the town centre offer**, introducing more varied uses to meet current and future demands.

5. **Celebrate and enhance Bury's iconic market**, to secure its long term success and destination maintain its role in the town centre.

6. Deliver **high quality public realm and connections** to improve access, function and vibrancy of outdoor spaces.



CATALYTIC REGENERATION + INCLUSIVE GROWTH

- Strengthen Bury's prime role within the region and borough as a mixed use town centre hub, to become one of Greater Manchester's most attractive destinations for residents, workers and visitors.
- Engage with the local community to shape the future of the Mill Gate and seek to address local needs.
- Deliver meaningful, measurable social impact, including through the delivery of improved health and wellbeing outcomes and opportunities for existing and future residents.
- Integrate the masterplan with the existing town centre and identify future strategic interventions to support on-going investment in Bury.
- Serve the needs of the local community and the surrounding towns through a clear focus on social impact, which is centred around the following themes: Strengthening the local economy by supporting local businesses, local employment, and local spend; furthering the inclusion and community cohesion agenda in Bury; addressing health disparities in and around the town centre; and strengthening community safety.
- Support future growth by strengthening the town centre's reputation as sustainable and attractive place for future investment.
- Successfully deliver the Framework's regeneration programme to support future strategic considerations and opportunities outside of the Framework Area, including supporting potential longer term infrastructure, funding and land assembly requirements.

A VIBRANT RESIDENTIAL COMMUNITY

- Deliver new high quality, residential accommodation that responds to local housing need and supports the diversification and vitality of the town centre.
- Catalyse a self-sustaining housing market that can deliver high quality homes of choice, facilities and amenities for all stages of life and income.
- Develop affordable housing options that cater to the needs of lower-income families and indivuiduals, ensuring that those who need it most have access to safe and secure housing within the town centre and surrounding areas.
- Seek to create a diverse, mixed and sustainable residential community that makes a positive contribution to the town centre.
- Identify opportunities to integrate existing and new residential communities within the town centre and beyond.

HIGH QUALITY PUBLIC REALM + CONNECTIONS

- Create a network of distinctive, high quality and well-connected spaces and routes that have a clear and unique role and function.
- Provide accessible and permeable routes for all and positively contribute towards the cycling and walking infrastructure network,
- Deliver a placemaking strategy that positively responds to Bury's heritage and identity, and strengthen the town centre's connection with the natural environment.
- Improve safety and security across the Framework Area, ensuring it is attractive and inclusive for all members of the community.

The Objectives.

The objectives build on the Vision and leverage the existing success of Mill Gate and Bury Town Centre to enable the delivery of a future proofed inclusive and sustainable town centre.

REFRESHED AND DIVERSE TOWN CENTRE

- Support the crucial role of the retail, leisure and cultural sectors and complement the existing town centre offer (including Bury Market, The Rock and the cultural quarter).
- Diversify Mill Gate's offering by introducing new uses that bolster and revitalise the town centre.
- Deliver a retail, leisure and visitor strategy that curates a vibrant mix of occupiers, which serve local needs and attract visitors.

EMBEDDING ENVIRONMENTAL SUSTAINABILITY

- Establish and commit to sustainability principles that run through the design, delivery and long term operation of all future proposals.
- Seek to deliver a bio-diversity net gain across the masterplan.
- Prioritise the natural environment to maximise community wellbeing benefits.

ENHANCING THE MARKET

- Improve the access, function and vitality of the market to secure its long term success and maintain its role in the town centre.
- Be sensitive to existing operations and ensure temporary arrangements maintain the quality and viability of the market throughout the delivery of the masterplan.

1.8 Planning Policy + Guidance

It will be essential for any future planning applications to accord with planning policy and consider guidance, to ensure that future proposals are in line with these. A detailed overview of the planning policy and guidance is provided at Appendix 01. This section provides an overview of the currently adopted policy and guidance at a national, regional and local level, which future applications will need to consider:

The Development Plan currently comprises:

- Bury Unitary Development Plan (Saved Policies) - 1997
- Places for Everyone (Main Modifications Draft) - 2023 (due to be adopted 2024)

The Bury UDP will be superseded by the adoption of the emerging Bury Local Plan. At the point of adoption this Framework will be reviewed to ensure consistency with the new policies outlined within the Local Plan.

The following documents comprise material planning considerations in the determination of planning applications within the Framework Area:

National planning policy and guidance, including:

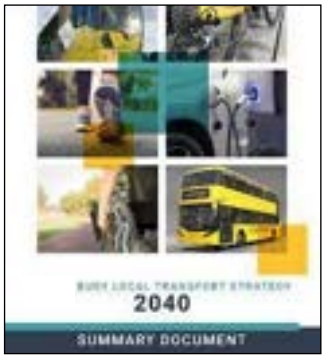
- National Planning Policy Framework (2023)
- National Planning Practice Guidance
- National Model Design Code (2021)

Regional and sub-regional policy and guidance, including:

- Greater Manchester Strategy 2021-2031
- Places for Everyone Publication Draft (2021)
- Greater Manchester Transport Strategy 2040,
- Greater Manchester Work and Skills Strategy 2022-2027
- Greater Manchester's Walking and Cycling Investment Plan (Bee Network) 2020.

Local Planning Policy and Guidance, including:

- Bury Supplementary Planning Guidance
- Bury Town Centre Masterplan (2022)
- Bury Transport Strategy (2023)
- Bury Housing Strategy 2021 – 2026
- Bury 2030 Vision – Let's Do It! Strategy
- Emerging Bury Local Plan













Planning Policy and Guidance Front Covers

1.9 Engagement

Two public engagement events have taken place to date, in Autumn 2022 and most recently in July 2023. These public engagement events provided an early opportunity to hear the views of the local community. Feedback from both engagement events has been collated, reviewed and considered, during the preparation of the draft Framework. This has provided a valuable opportunity for the JV to listen and engage with the local community, and to ensure that local voices have been considered and represented in shaping the future of the Mill Gate.

Future proposals within the Framework area will continue to be subject to extensive public and local community engagement to ensure that the regeneration of the Mill Gate delivers an accessible, safe and attractive place, that meets the needs of both existing and future communities.





1// Mill Gate Engagement Event (2023)
2// Place on Tour: Bury - Mill Gate Site Visit
3// Mill Gate Engagement Event - Mind Map

1.10 Status of the Regeneration Framework

This draft Framework has been published for public consultation. Following the consultation period, the responses received will be considered and, as required, the Framework will be updated.

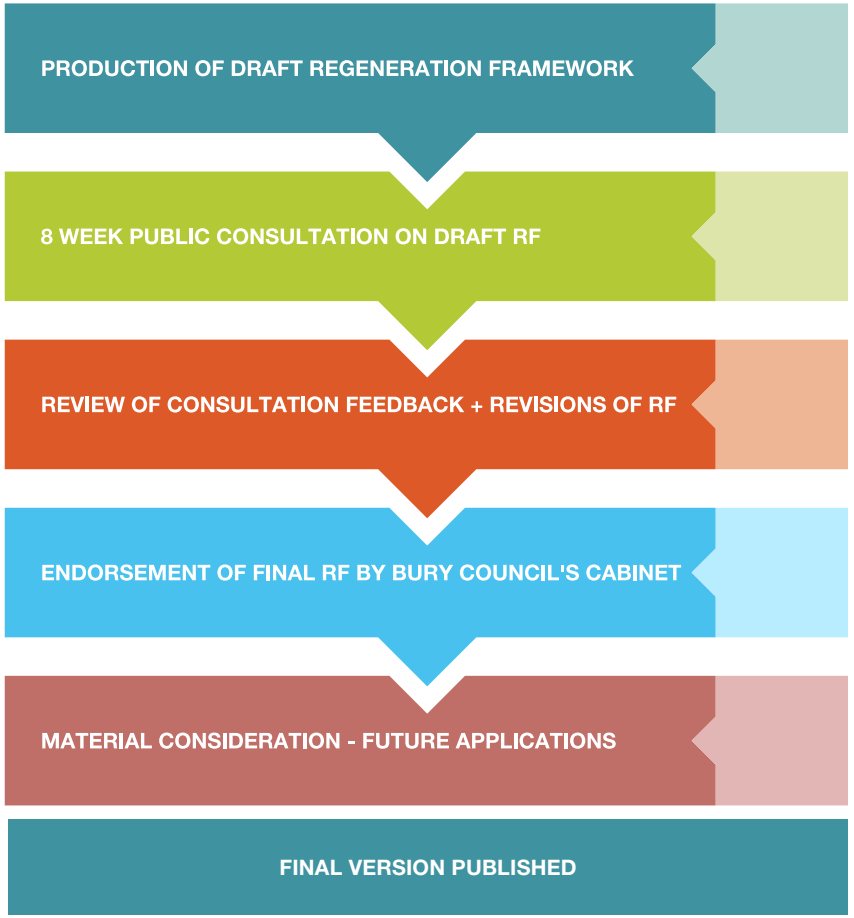
The updated Framework will then by considered by Bury Council's Cabinet for endorsement.

Once endorsed by Bury Council, the Mill Gate RF will act as a material consideration (with significant weight) for the Local Planning Authority in the determination of future planning applications that fall within the Framework area.

Notwithstanding this, future proposals will continue to be determined through the statutory planning process. This will include a full and robust assessment in accordance with national, regional and local planning policy, as well as any other material considerations.

Flexibility //

The Framework provides the foundation for future development regeneration proposals, whilst ensuring that the necessary flexibility is provided to enable the detailed design of each plot to be refined. The flexibility of the Framework is important to allow future development to respond to changing market conditions, technological advancements, design innovation, technical analysis and environmental considerations, throughout the long-term delivery phase.



1.11 The Team

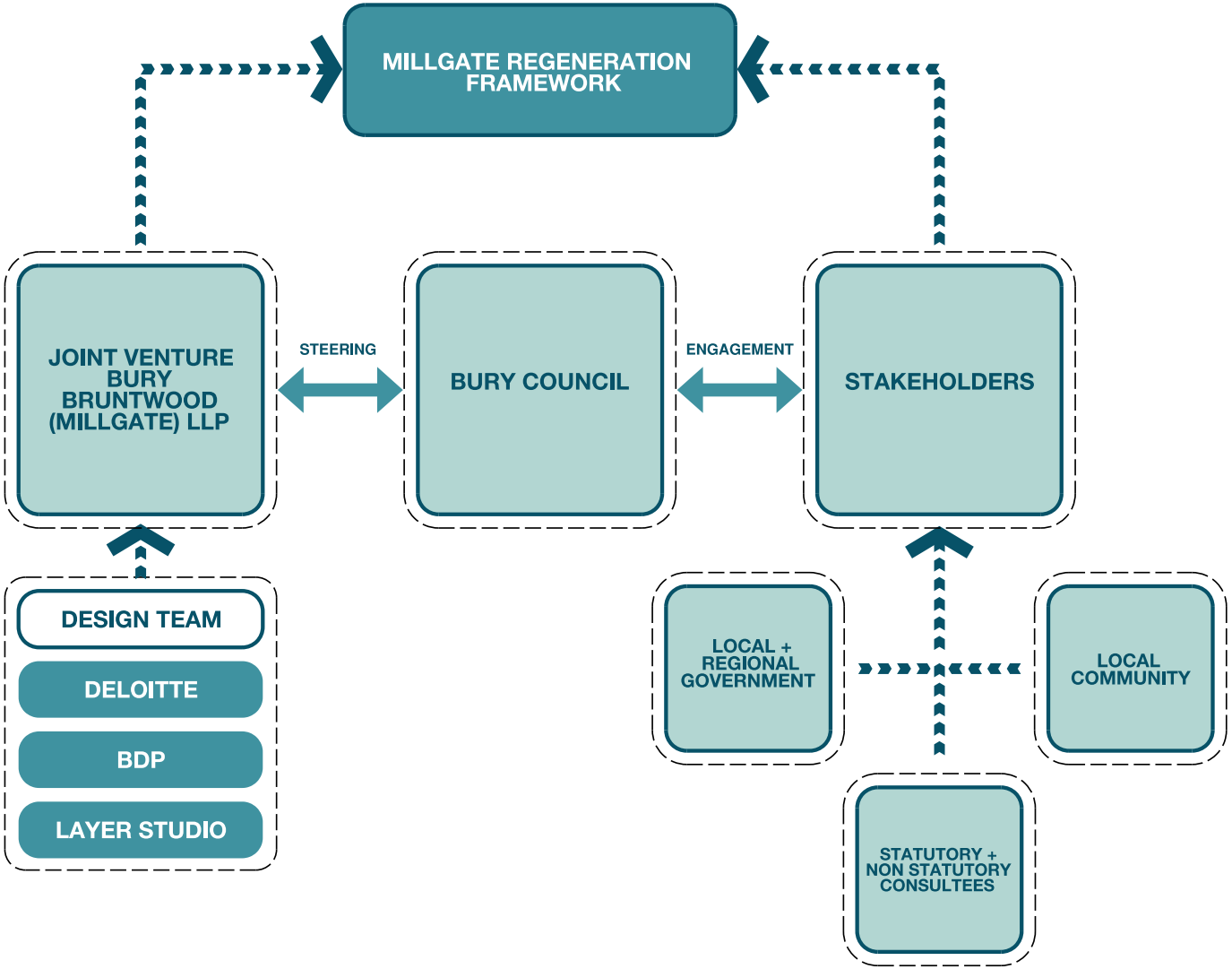
Project Team

The Framework has been brought forward by Bury Bruntwood (Mill Gate) LLP (a Joint Venture between Bruntwood and Bury Council).

The Framework has been informed by discussions with Senior Officers at Bury Council. This collaboration with the Local Authority has sought to ensure that the Framework aligns with Bury Council's strategic objectives and that is provides a suitable level of detailed guidance to inform future proposals.

The Framework has been prepared by an appointed multi-disciplinary team, including:

- BDP
- Deloitte
- Layer
- Curtins
- Crookes Walker Consulting
- Hatch





Drivers of Regeneration.

2

2.1 Strategic Regeneration

Strategic Regeneration

Investment in the Framework Area is essential to support a sustainable future for Bury Town Centre and provide local residents with opportunities for beneficial outcomes. The Levelling Up agenda is committed to reducing geographical inequality in the UK, while GMCA Devolution gives Greater Manchester new tools and responsibilities to drive growth and enhance the local economy, services, and infrastructure. These objectives are consistent with the National Planning Policy Framework (NPPF), which emphasizes a positive approach to managing and adapting town centres to unlock inclusive economic growth.

Improved rail infrastructure, the Northern Powerhouse initiative, and Greater Manchester's future economic growth will all contribute to the region's future prosperity. Greater Manchester's Places for Everyone Plan (PfE) recognises the need to deliver high levels of economic growth to support the prosperity of the city region, and specifically identify substantial opportunities across the North-East and Wigan-Bolton growth corridors.

Bury Town Centre's Masterplan, within which the Mill Gate sits, represents a key opportunity to unlock inclusive growth and support the broader regeneration, economic, and social ambitions and opportunities for Bury Town Centre. The Mill Gate can therefore help Bury Town Centre reach its full potential.

The commitment to promoting equality of opportunity and driving investment across the North has been key priority for successive Governments, and serves as a golden thread that runs through all Levelling Up initiatives.

The Mill Gate represents a significant regeneration opportunity, to deliver a mixed-use town centre hub that supports the needs of the existing and future community. This section provides an overview of the primary drivers of regeneration. For additional detail please refer to Appendix 03.







1// Bury Interchange - Metrolink
2// Manchester Piccadilly Station
3// The Rock -Northern Powerhouse Study

2.2 Role of the Highstreet

The retail market has experienced a significant downturn due to the expansion of the online market share, resulting in a rapid decline in sales densities and the loss of major high street retailers. To support their long-term vitality, town centres should adapt by introducing a more diverse range of uses to generate footfall and activity. Evening and night-time activity can also play a crucial role in boosting activity and creating more diverse employment opportunities in town centres while enhancing their reputation as attractive visitor destinations.

As the sub-regional centre for the Borough and a key retail and commercial destination, Bury's retail offer has evolved over the last couple of decades. Historically, the Mill Gate shopping centre was the town's premier shopping destination up until the opening of The Rock in 2010. This resulted in changes to the Mill Gate offering, within the shopping centre becoming home to smaller, more local retailers as well as budget, low-value brands. Today, retail units within the Mill Gate struggle to attract high-quality occupiers which is exacerbated by the over provision of traditional retail and the high proportion of charity shops and smaller budget-focused brands. To address this, there is an opportunity to reduce existing duplication and vacancy by introducing more mid-range national brands and expanding dine-in food and beverage options to enhance the appeal of Mill Gate to a broader customer base.

Similarly, Bury Market, a nationally renowned cornerstone of Bury heritage and identity, would also benefit from reduced duplication and the introduction of more varied local businesses and entrepreneurs to enhance its attractiveness and the visitor experience. Despite this, the Market and Bury's new Flexi-Hall project have received Levelling Up funding which will seek to better integrate this area into the wider town centre.

The town centre needs to adapt and respond to changing circumstances by rationalising traditional retail floorspace and offering more 'experience-driven' retail, leisure, and food and beverage offerings to support the Mill Gate's long-term vitality. By doing so, the Mill Gate can be a key component of Bury Town Centre reaching its full potential by acting as a catalyst for future investment in the town centre.

1// High Street Amenity Spaces
2// High Quality Homes
3// Places to Work
4// Town Centre Regeneration









2.3 Education + Employment

The Northern Powerhouse initiative aims to tackle barriers to productivity and unlock the economic potential of the North. Despite Greater Manchester's strengths, the city region's productivity has remained 10% below the UK average for the past two decades. At a local level, Bury's economic growth lags behind Greater Manchester, highlighting the need for further investment and improved productivity. While Bury Town Centre is a key employment hub, it has shown lower employment growth than other Greater Manchester localities.

The Mill Gate represents an opportunity to increase job opportunities across a range of sectors and skill levels within the town. Investment in higher-level skills is crucial for residents to access job opportunities, and so the Borough should seek to invest in the skills base of its workforce to maintain and further develop a competitive skills supply offer.

Bury Town Centre currently accounts for over a quarter of all businesses in the Borough, with a higher-than-average proportion of small businesses, highlighting the Borough's entrepreneurial activity. However, this also indicates that the business base may be highly exposed to economic shocks.

To address this, there is a need to support the delivery of flexible and affordable workspaces, support and create more local employment opportunities, attract higher-paying employment opportunities, which can help to encourage younger residents to stay or relocate, and stimulate wider economic growth through increased local expenditure.



2.4 Residential Demand

The UK is facing a housing crisis, with many individuals struggling to access suitable and affordable housing. The Government and NPPF recognises the need to increase the supply of new homes, including affordable homes, and ensure that they are built faster and in the right locations. Residential development in town centres plays an import role in increasing the supply of new homes, whilst supporting town centre vitality and providing easy access to essential services.

Bury is facing significant housing demand and affordability challenges due to sustained population growth, with house prices increasing by 57% in the last decade. The limited supply of new high-quality housing has resulted in affordability challenges, restricting the town's potential to attract and retain skilled young people, and contributing to elevated levels of outward migration for higher-skilled individuals. Similarly, there is high demand for housing from people who work outside the Borough, and whose incomes are generally higher than those that work and live within Bury. Therefore, there is a need to deliver a range of high-quality housing, including Build to Rent, to meet local housing need and increase the draw of the town centre as an attractive destination to live and work.







Residential images

2.5 Sustainability

The planning system strives to achieve sustainable development by delivering economic, social, and environmental benefits together.

To achieve a clean, carbon-neutral, climate-resilient place, the Greater Manchester Combined Authority's 5-year Environment Plan and Bury Council's Climate Action Strategy (2021) and Action Plan (2023) aim to progress to carbon neutrality by 2038. At both a national and regional level, the importance of the is recognised as playing a crucial role in improving health and well-being outcomes for communities, while also reducing reliance on public sector services.

The provision of sustainable transport options will contribute to achieving these targets, by reducing emissions from personal vehicle usage and a decreasing levels of air pollution. Future proposals at Mill Gate offer the opportunity to promote sustainable and active travel by expanding green routes and improving connections to other parts of the town centre; through this, residents and visitors will be encouraged to practice active travel and reduce car dependency. Low-carbon development at Mill Gate also presents an opportunity to support the Greater Manchester and Bury's net-zero carbon goals. The JV is developing a sustainability strategy to ensure all new and existing buildings exceed or meet local and national targets, ensuring that the growth of Bury Town Centre is both sustainable and prosperous.











Sustainability Images

2.6 Inclusive Growth



Inclusive growth is at the forefront of Greater Manchester's PfE and Bury's 2030 "Let's Do It!" strategy. Within Bury, there are significant disparities and inequalities between residents, with the Borough characterised by a range of socio-economic barriers which disproportionately impact residents' quality of life.

Communities around Bury Town Centre are still marked with pockets of deprivation, with Bury featuring higher levels of poverty than the national average. This is illustrated by neighbourhoods, particularly to the east and west of the town centre, which display lower-than-average household income levels, poor quality (often private rented) housing and limited access to public services and employment opportunities.

Bury is one of the worst-affected locations in the North West with regard to housing affordability, with almost 70% of homes priced beyond the household income of the average resident. This presents is an opportunity to contribute to a more balanced housing market for the town centre by delivering mix of housing of diverse types and tenures, which are high-quality, futureproofed and affordable. This can seek to overcome reduced levels of social mobility, higher levels of preventative poor health, and a perceived lack of opportunities for residents, both in education and employment.

Residents who are in some of the most deprived parts of the Bury face some of the most significant health challenges, resulting in substantial disparities across Borough. This includes significant variation in life expectancy, whereby in a more prosperous location a resident is expected, on average, to live an additional 8 years when compared to a resident living in a more deprived area. The Borough is also characterised by a diverse population, most notably an ageing population which presents challenges in limiting the supply of labour in the morning age population and increasing demand for health and social care services.

Bury faces further challenges with health and well-being acting as a barrier into employment, with 31% of economically inactive residents being long term sick. In addition, the prevalence of childhood obesity and overweight around Bury Town Centre (within East Bury Ward) is higher than both the Borough wide and national average. This variation further reinforces the health inequalities and challenges facing the Borough.

The regeneration of Mill Gate and the town centre provides an opportunity to address the high levels of deprivation within the town centre and deliver improved health and wellbeing outcomes to address inequalities within the Borough. This can seek to promote social and economic diversity by providing homes and opportunities for people of different income levels and backgrounds, which plays an important role in reducing social segregation and promoting social mobility, interaction and cohesion. This will in turn support the establishment of more sustainable, mixed communities.



Site Analysis.

3

3.1 Site Overview

The Framework Area is located in the heart of Bury town centre, and comprises primarily of the Mill Gate Shopping Centre, Bury Market, The Rock, Kay Gardens and Market Place.

The primary component of the Framework Area, the Mill Gate Shopping Centre, opened in July 1992 following a £6m redevelopment project which transformed Bury's primary shopping precinct into a covered, then state-the-art shopping mall.

The Framework Area benefits from numerous interfaces with notable assets in the town centre, including the Interchange (which is subject to forthcoming regeneration proposals itself), Angouleme Way, Bury's historic quarter, and the new Rock shopping district.

Mill Gate.

Appendix 02 includes further details on the site's history and the surrounding context.



Bury Mill Gate Site Overview

3.2 Existing Uses, Building Heights + Environmental Conditions

Existing Building Uses



Retail Shopping

The Framework Area is characterised by a range of retail shopping and food and beverage uses, spanning from large high-street names (such as HMV, New Look and HMV) to smaller, family-run independent businesses that help to give Bury its distinctive, community-driven identity.

Over recent years, changing shopping habits and the opening of the Rock shopping district have resulted in significant challenges to traders across the Framework Area, particularly at the Mill Gate centre. To avoid vacant units blighting the retail experience within the Mill Gate, owners have prioritised occupancy over rental income, but this is not a long term approach to creating a sustainable shopping centre. This short term intervention has been relatively successful to maintain the area's vibrancy, however, it is not the suitable long-term solution to ensure the shopping centre's vitality.



Bury Market

Bury Market is an award-winning open-air market to the immediate south east of the Mill Gate shopping centre. To many, the town of Bury is synonymous with the Market, and it is considered a fundamental aspect of the culture and economy for the town and wider Borough. The Market not only provides vital trading opportunities for small-scale market sellers serving the local community, but is also a vital tourist attraction. It is often visited by coachfulls of tourists who visit to see "Britain's Favourite Market."

The Market is a crucial component of the Framework Area, and at the centre of Bury's continued national reputation as a thriving market town.



Leisure and Culture

The Met theatre, located in the Grade II Derby Hall, is a significant element of the Framework Area. It has been operating since 1979 by the charity Bury Metropolitan Arts Association. In 2022, the Met sold over 20,000 tickets across 225 events and generated over £335,000 to be reinvested into the Theatre and Charity. It is a well-known institution to Bury and surrounding residents, with 76.6% of visitors from Greater Manchester (and 45% of those coming from the Borough of Bury).



Other Uses

In addition to the range of retail and cultural offerings, the Framework Area is also home to;

- The Football College, a football-focused college operated by VLUK and The Uni Centre of Sport, offering Level 2 and 3 courses in Sports and Sports Coaching Development.
- Mill Gate Multi Storey Car park providing an important footfall generator.
- A small number of social rented dwellings in an isolated location.
- There are also a range of other ancillary town centre uses within the Framework Area, including opticians, pharmacies, Job Centre Plus, Post Office, and other experience-driven retail, including hair and beauty salons, bra fitting specialists and clothing alteration boutiques. These retail offerings cannot be easily replicated online, and therefore continue to be successful despite the growing dominance of e-commerce.

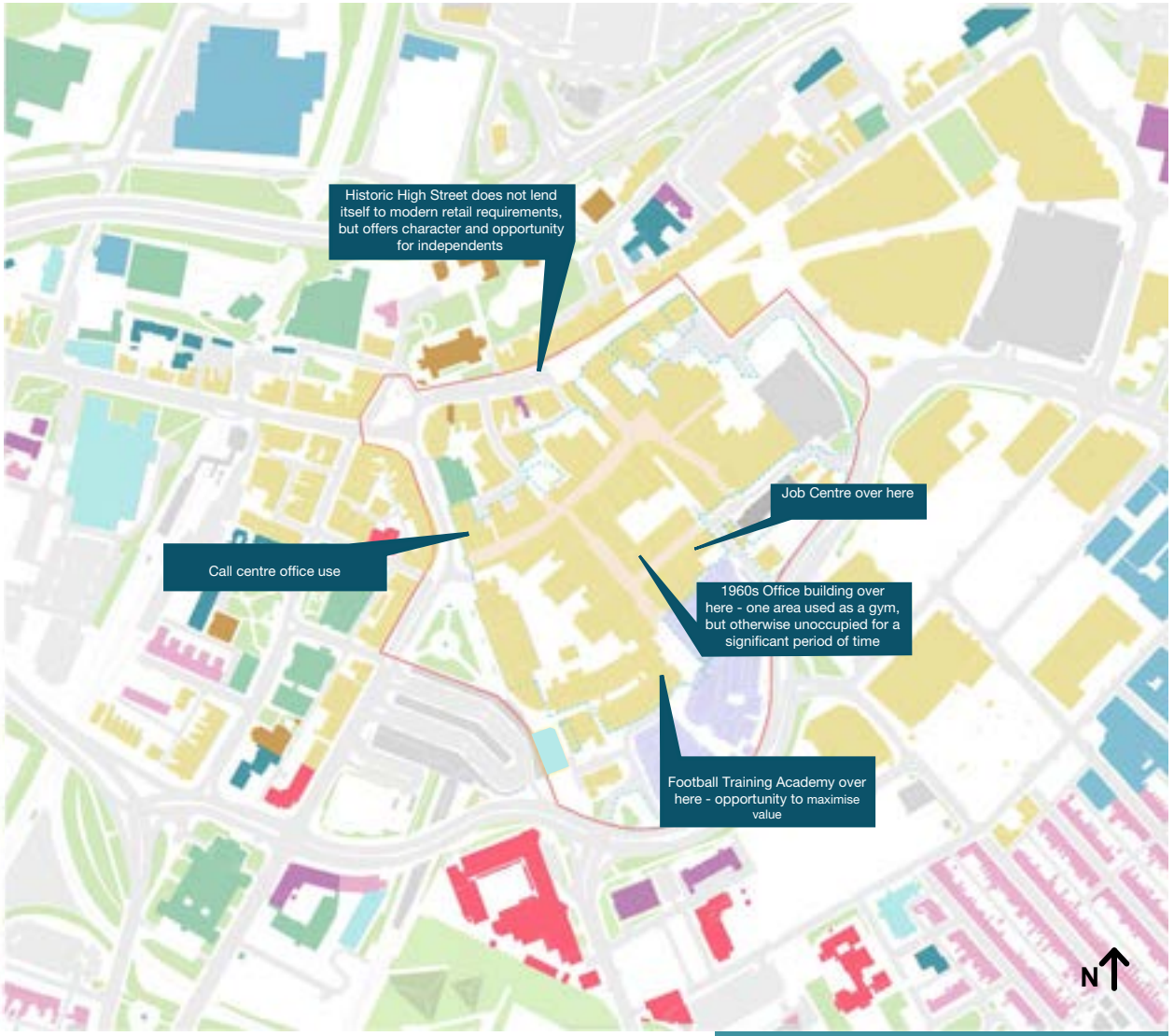
Land Use

The Framework Area is relatively singular in its use, with retail dominating the heart of the Mill Gate, with few exceptions as noted earlier.

Across the Framework Area, use becomes more varied with more civic functions being provided to the west, further retail to the east with the Rock, but with the addition of apartments, and a cinema and chain dining offer, and to the south is a big box retail park subdividing more traditional terraced housing.

It is evident within the heart of the Mill Gate that the retail offer and servicing strategy drives a hard townscape with little animation either outside of trading hours or within spaces between shopping malls.

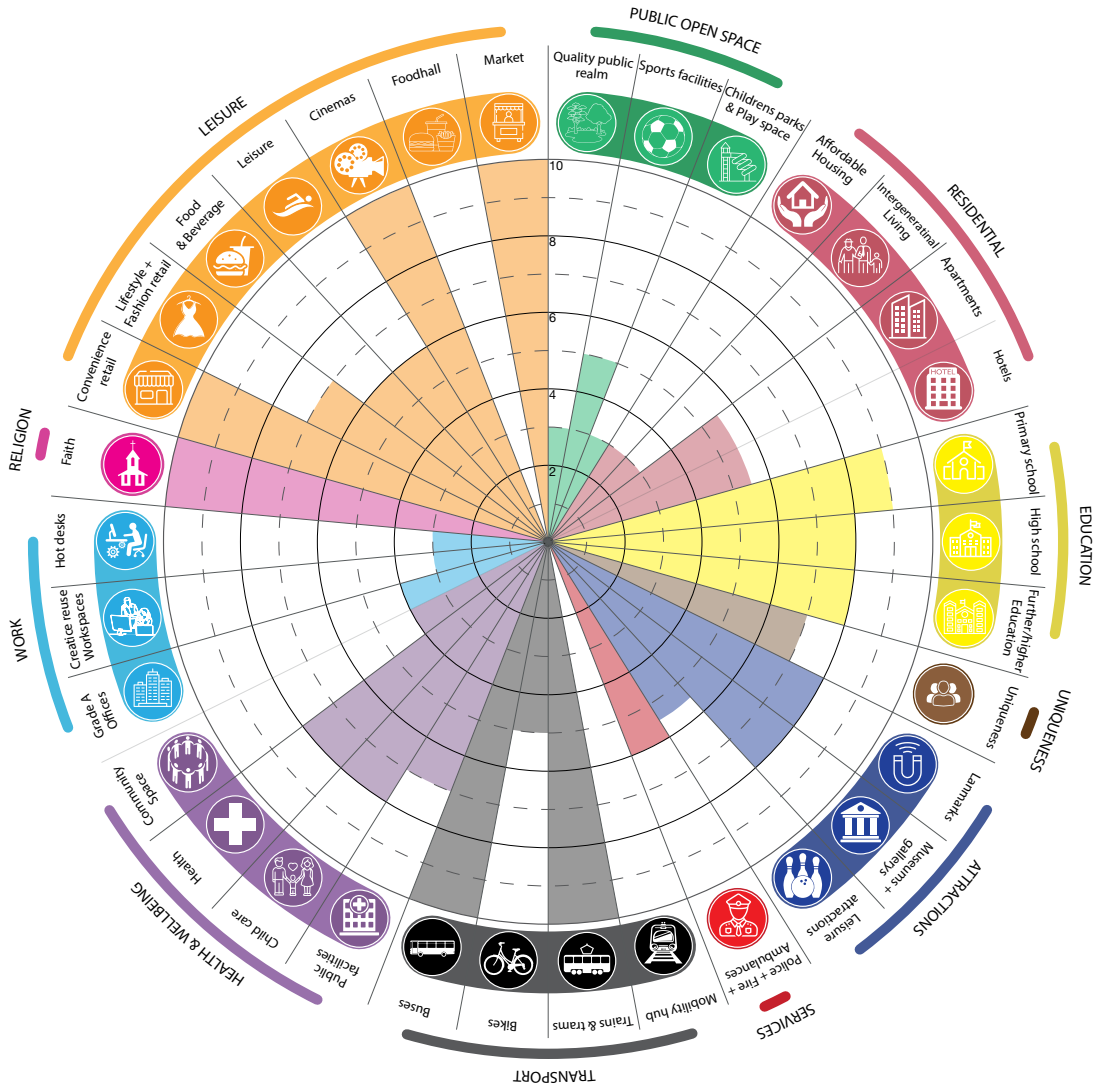
The approach of the Mill Gate to the south is most notable, with the impact of the arterial Angouleme Way compounding the feeling of being a back to the town centre when it is a place where many arrive.



Existing Building Use Analysis

The adjacent Town Centre analysis tool has been utilised to asses the existing land use against a series of parameters developed to understand if a place has all of the components to be a sustainable place to live with a focus on walking and cycling within a 20 minute radius.

A perfect town would complete a fully coloured dart board. The illustration for Bury represents a clear picture of where the opportunities are within the Mill Gate to provide benefit to both this area but also the surrounding neighbourhoods.

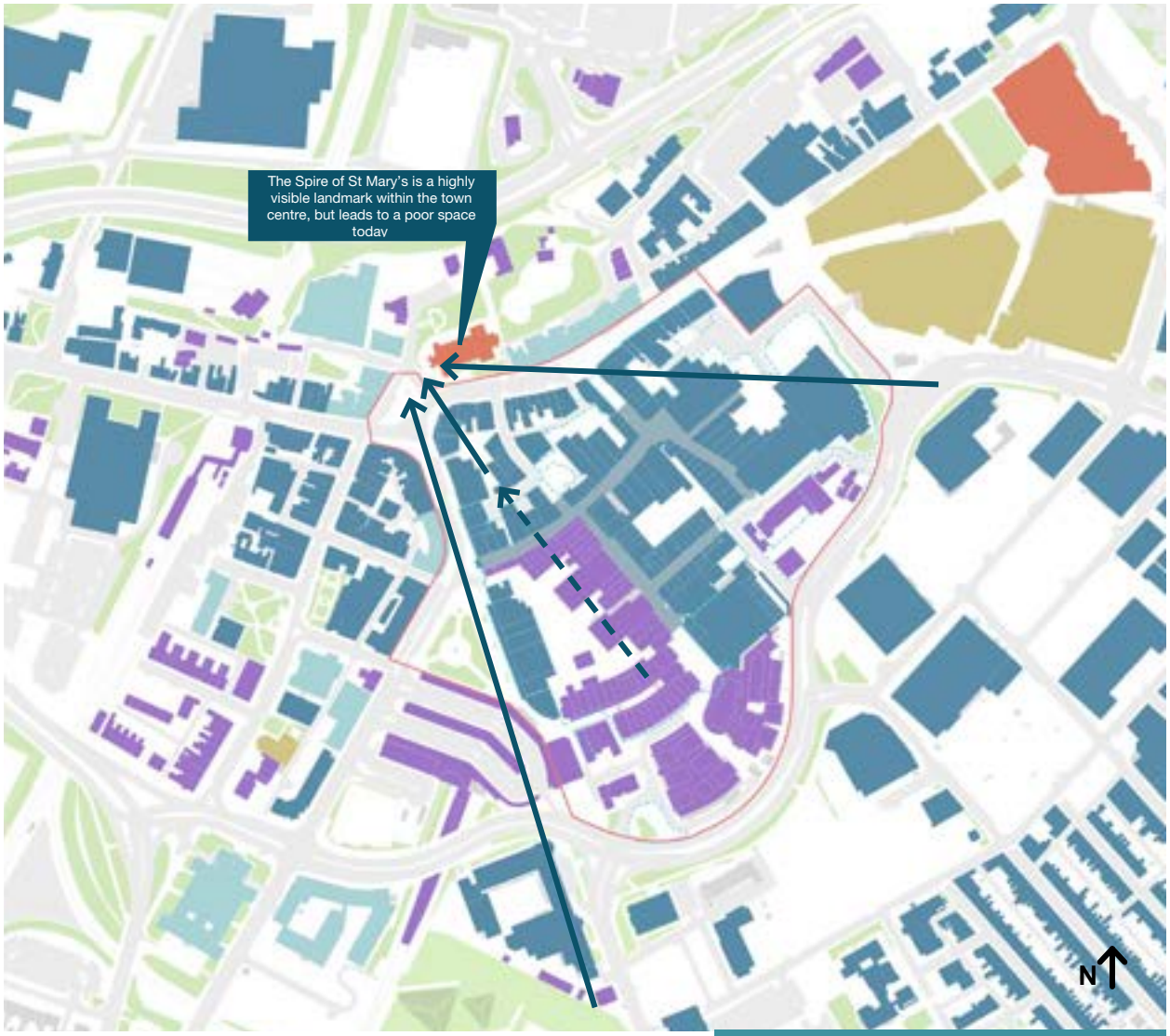


Building Massing and Scale

The Framework Area is comparatively low-rise for a highly connected town centre, with the majority of buildings ranging between 2 - 4 storeys. Across the Framework Area, heights generally increase towards the centre, rising up to five storeys at the eastern section towards the multi-storey car park and the Rock shopping district. Whilst largely low rise, the Framework Area comprises a relatively dense urban grain, resulting in few views across or into the site.

From street-level, the Framework Area is characterised by a variety of facades of differing scales. The heights, massing and layout of the more modern elements of the Framework Area (broadly comprising the Mill Gate shopping centre and Market) do not directly respond to the surrounding townscape, particularly the more historic parts of the town toward the west and north east of the Framework Area.

Across the Framework Area, facades are characteristically between 8 and 14m high, with the roof lines of the historic sections generally between 10 and 12m, whilst more modern sections are often between 8 and 10m. The different scales and heights are a result of the organic, uncoordinated growth of the town centre.



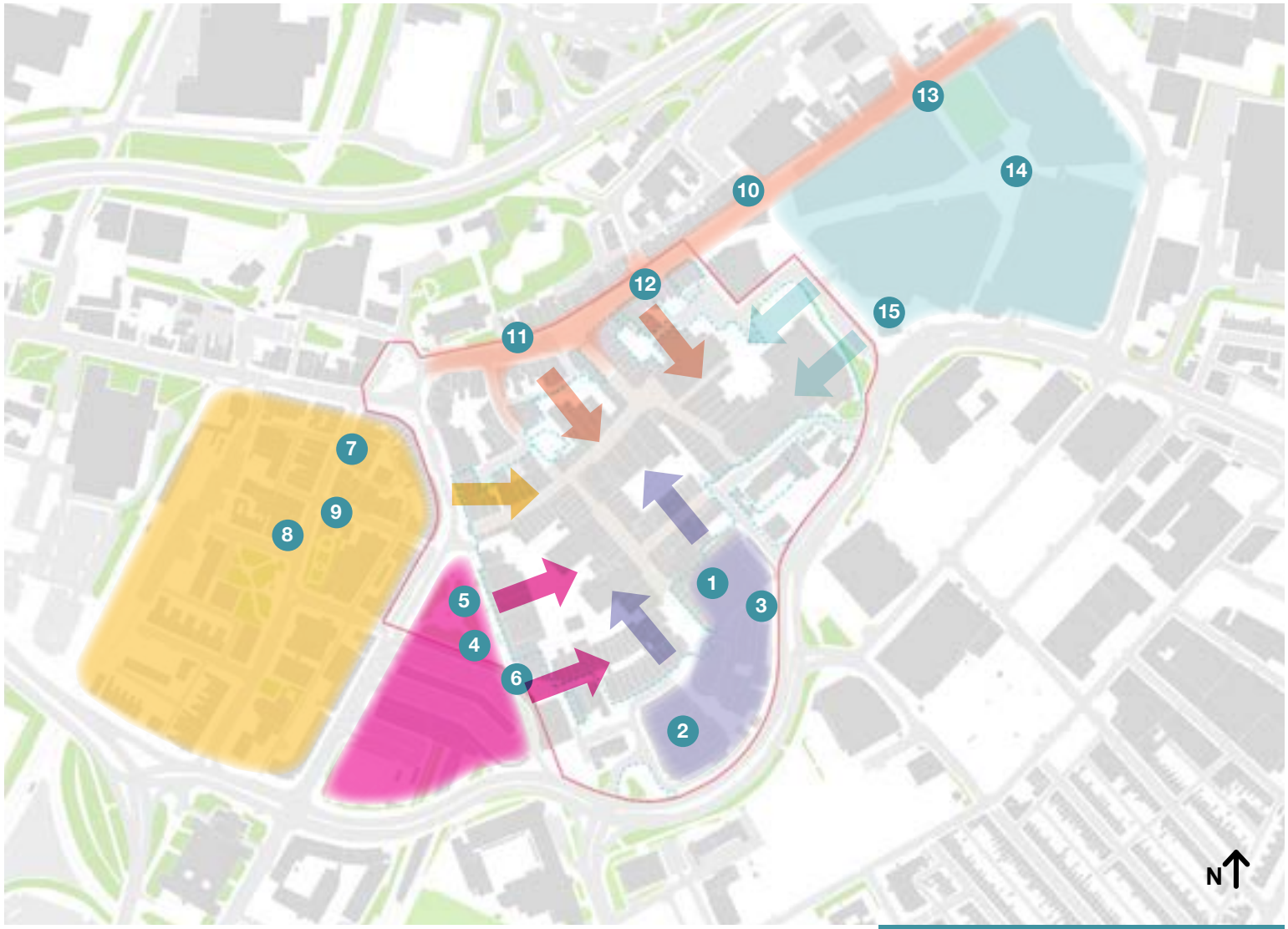
Building Heights

The Bury Palette

As described earlier in this section the site and surrounding context has a rich history and character that can help provide the Mill Gate redevelopment with several cues and inspirations from which to work.

Given that Bury Town Centre already has a quality and sense of place investigating the existing town centre can, for future development, provide a clear and responsible method to create a sense of place that is tied back to Bury. Reflecting patterns and rhythms of the surrounding buildings, roofscapes and tactility/solidity of the material can all be part of developing what we see as a site-specific sense of place.

Outlined in the following analysis is a summary investigation taken for each surrounding character area which can assist in the future architectural expression and placemaking of the Mill Gate masterplan.



Key

- Bury Market
- Kay Gardens
- Civic Garden
- The Rock High Street
- The Rock

BURY MARKET

MATERIALITY //
Metal / Curtain Walling

ROOFSCAPE //
Single Pitched / 'Bird - Wing'

ARCHITECTURAL STYLE //
Open Air / Arcade / Brutalist

KAY GARDENS

MATERIALITY //
Sandstone / Limestone / Brick (historic)

ROOFSCAPE //
Flat / Single Pitched / Punctuating Chimneys

ARCHITECTURAL STYLE //
Mixture of late Victorian / Nineteenth Century / Ornamented / Contemporary

CIVIC QUARTER

MATERIALITY //
Sandstone + brick (modern + historic)

ROOFSCAPE //
Ridged / Multi-Gable / Hip

ARCHITECTURAL STYLE //
Mixture of late Victorian / Nineteenth Century / Ornamented

THE ROCK HIGH STREET

MATERIALITY //
Sandstone / brick (modern + historic)

ROOFSCAPE //
Ridged / Multi-Gable / Hip / Half Hip

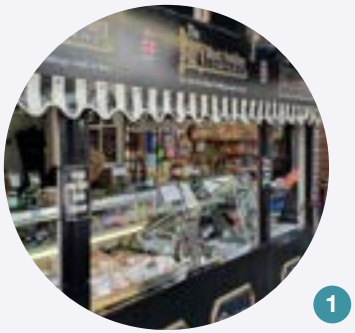
ARCHITECTURAL STYLE //
Contemporary / Victorian / Edwardian / Art Deco / Tudor

THE ROCK

MATERIALITY //
Brick / Metal / Timber / Curtain Walling

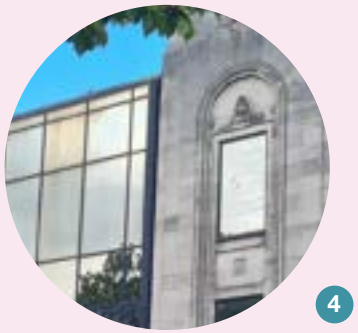
ROOFSCAPE //
Flat

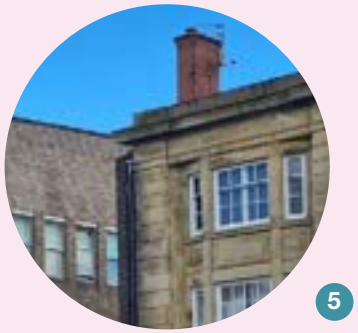
ARCHITECTURAL STYLE //
Contemporary


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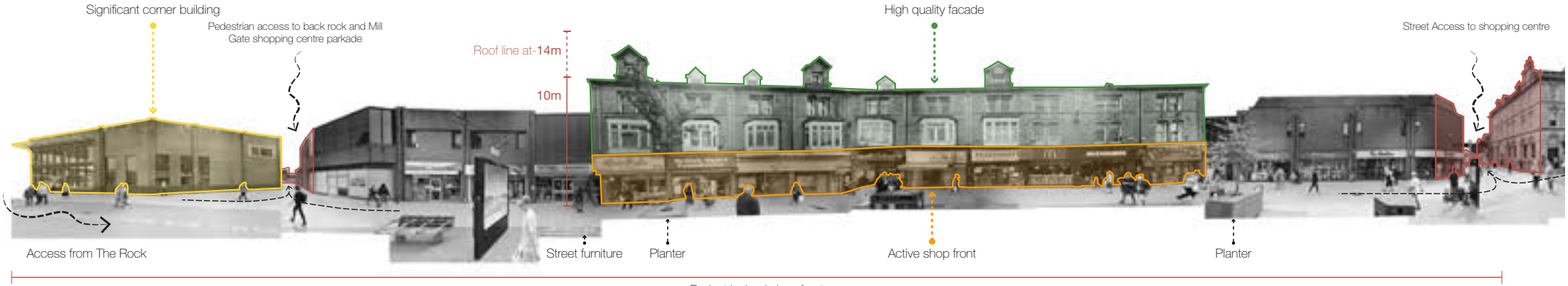

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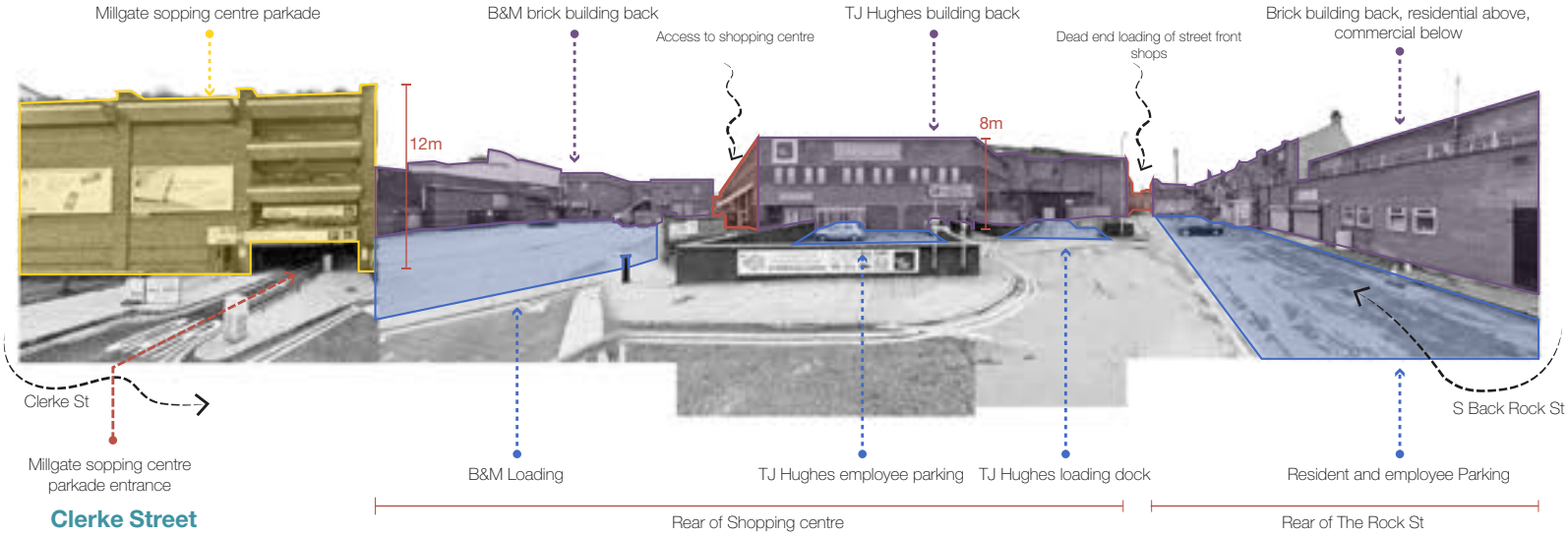

14


15

Existing Street Scenes



The Rock

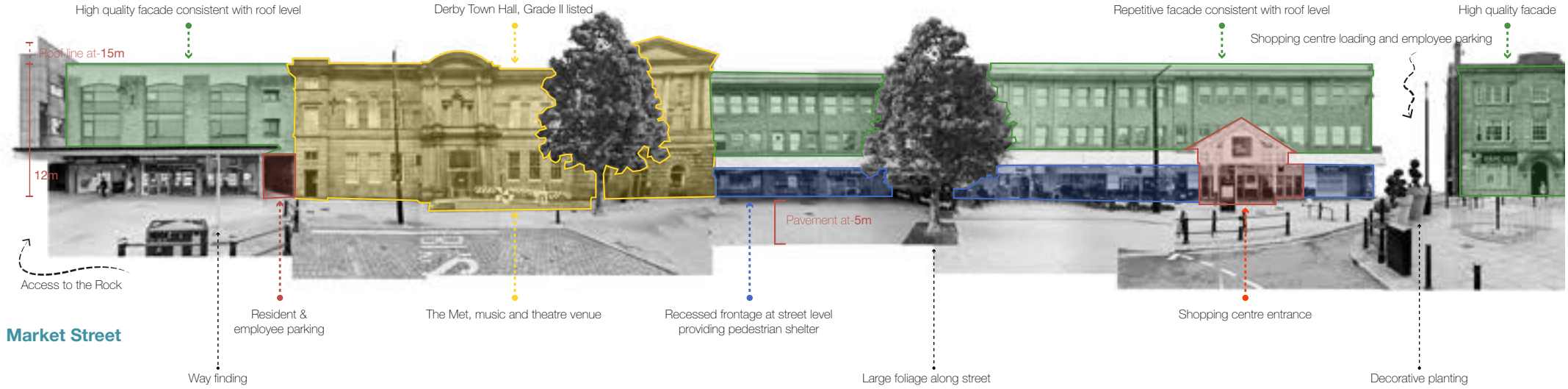


Clerke Street

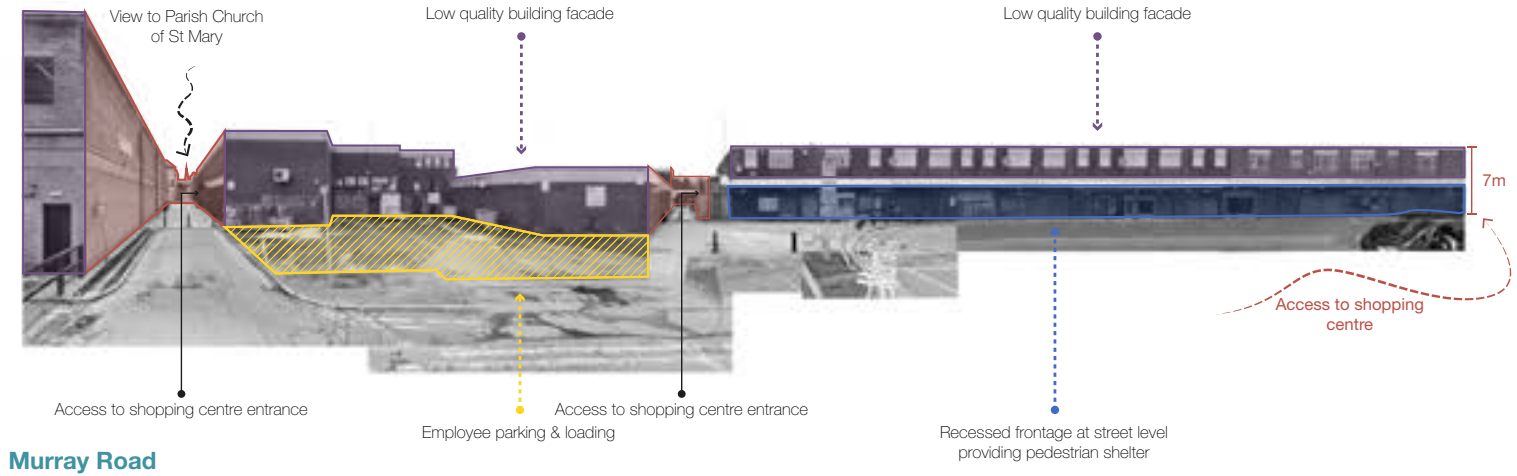


Street Scene Location Plan

Existing Street Scenes



Market Street



Murray Road



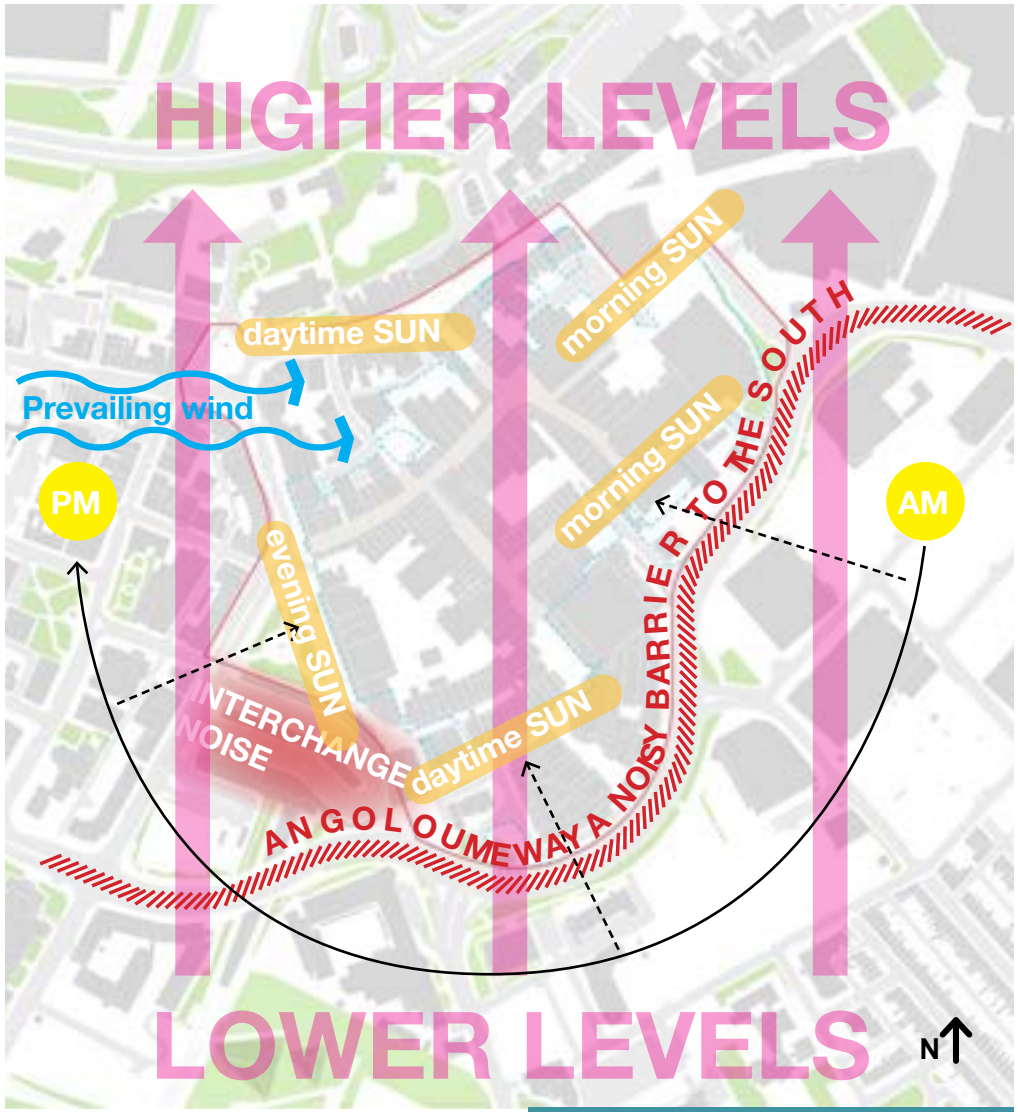
Street Scene Location Plan

Environmental Considerations

Analysis of the site's micro-climate is important to ensure maximum daylight is provided to both the external public spaces and the new buildings that are being proposed. The Mill Gate has areas that are very noisy and busy such as Angouleme Way, however the further north and east you travel into the site, it is much quieter – which is ideal for residential buildings. Wind analysis is important to ensure that any new tall buildings that are proposed do not have a detrimental effect on the pedestrian comfort due to increased wind speeds.

The key principles have been:

- Maximise views to the Church of St Mary the Virgin from Rochdale Road + Bury Market.
- Frame new public realm and squares from The Rock Development.
- Maximise South facing units.
- Balance the need for views with the need for shading and voiding solar gain.
- At high level maximise views to Kay Gardens and high-quality views of the Lancashire Hillside.
- Minimise north facing single aspect units to improve daylight.



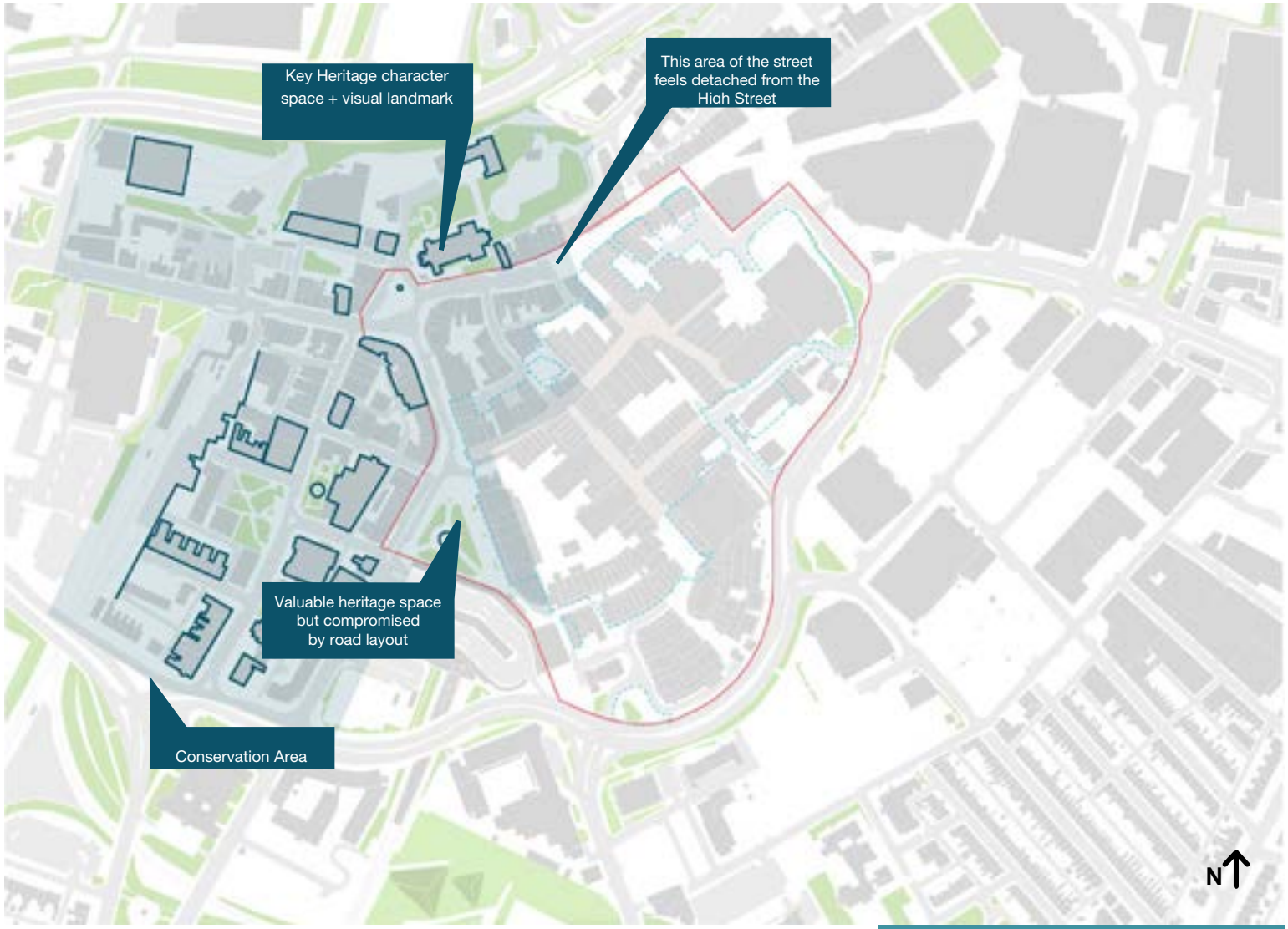
3.3 Heritage, Landmarks + Key Views

Listed Buildings + Conservation Areas

The Framework Area is partially located with Bury Town Centre Conservation Area, including sections of the Rock, Kay Gardens and Market Place.

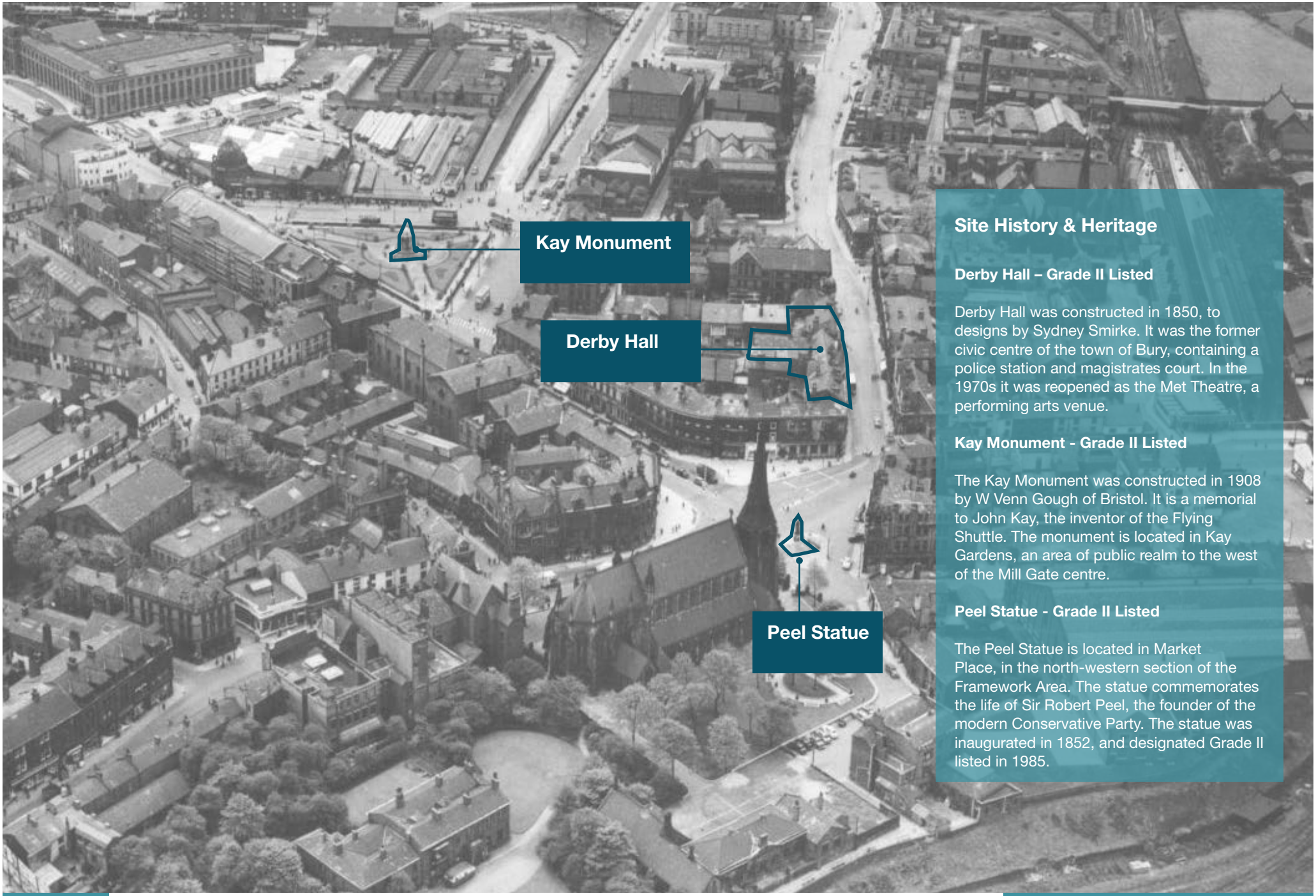
A testament to the town centre's industrial and military heritage, there are 30 Listed Assets (comprising 2 Grade II*, 26 Grade II, 1 Grade I and a Scheduled Monument) within 200m of the Framework Area.

Derby Hall, the Peel Memorial and Kay Monument are located wholly within the Framework Area.



- Listed building

- Conservation Area



Site History & Heritage

Derby Hall – Grade II Listed

Derby Hall was constructed in 1850, to designs by Sydney Smirke. It was the former civic centre of the town of Bury, containing a police station and magistrates court. In the 1970s it was reopened as the Met Theatre, a performing arts venue.

Kay Monument - Grade II Listed

The Kay Monument was constructed in 1908 by W Venn Gough of Bristol. It is a memorial to John Kay, the inventor of the Flying Shuttle. The monument is located in Kay Gardens, an area of public realm to the west of the Mill Gate centre.

Peel Statue - Grade II Listed

The Peel Statue is located in Market Place, in the north-western section of the Framework Area. The statue commemorates the life of Sir Robert Peel, the founder of the modern Conservative Party. The statue was inaugurated in 1852, and designated Grade II listed in 1985.

Landmarks

The Framework Area is partially located with Bury Town Centre Conservation Area, including sections of the Rock, Kay Gardens and Market Place.

A testament to the town centre's industrial and military heritage, there are 30 Listed Assets (comprising 2 Grade II*, 26 Grade II, 1 Grade I and a Scheduled Monument) within 200m of the Framework Area.

Derby Hall, the Peel Memorial and Kay Monument are located wholly within the Framework Area.

Derby Hall

Derby Hall is a Victorian neo-classical building situated on Market Street, and forms part of the Framework Area. The hall is a testament to Bury's industrial success, and is an example of the town's 19th century civic grandeur. However, the hall is flanked to its north and south by late 20th century extensions which attempted to architecturally replicate the scale and regular facade symmetry of Derby Hall, to varying levels of success.

Bury Market

Bury Market, which first opened in 1971, is a nationally-renowned, award winning open-air market, and is a key aspect of Bury's character. Whilst the market is not under any statutory protected status, it is covered by Bury UDP Policy S3/4, which supports proposals to seek to consolidate and enhance market facilities in Bury through environmental and physical improvements.
Despite its significance to the culture and economy of Bury, the market's last refurbishment came in 1999, and as a result the physical infrastructure is in vital need of investment. This includes the quality of public realm and its interface with the Interchange and Mill Gate shopping centre. In its current configuration, visitors must enter the Mill Gate and then cross an area of characterless, hard landscaping before entering the market through an unmarked entrance.

To facilitate improvements, £20m of the Levelling Up fund was allocated to Bury Market for the delivery of a new "flexi hall", a new oversailing canopy and improvements to access routes from Bury Interchange.

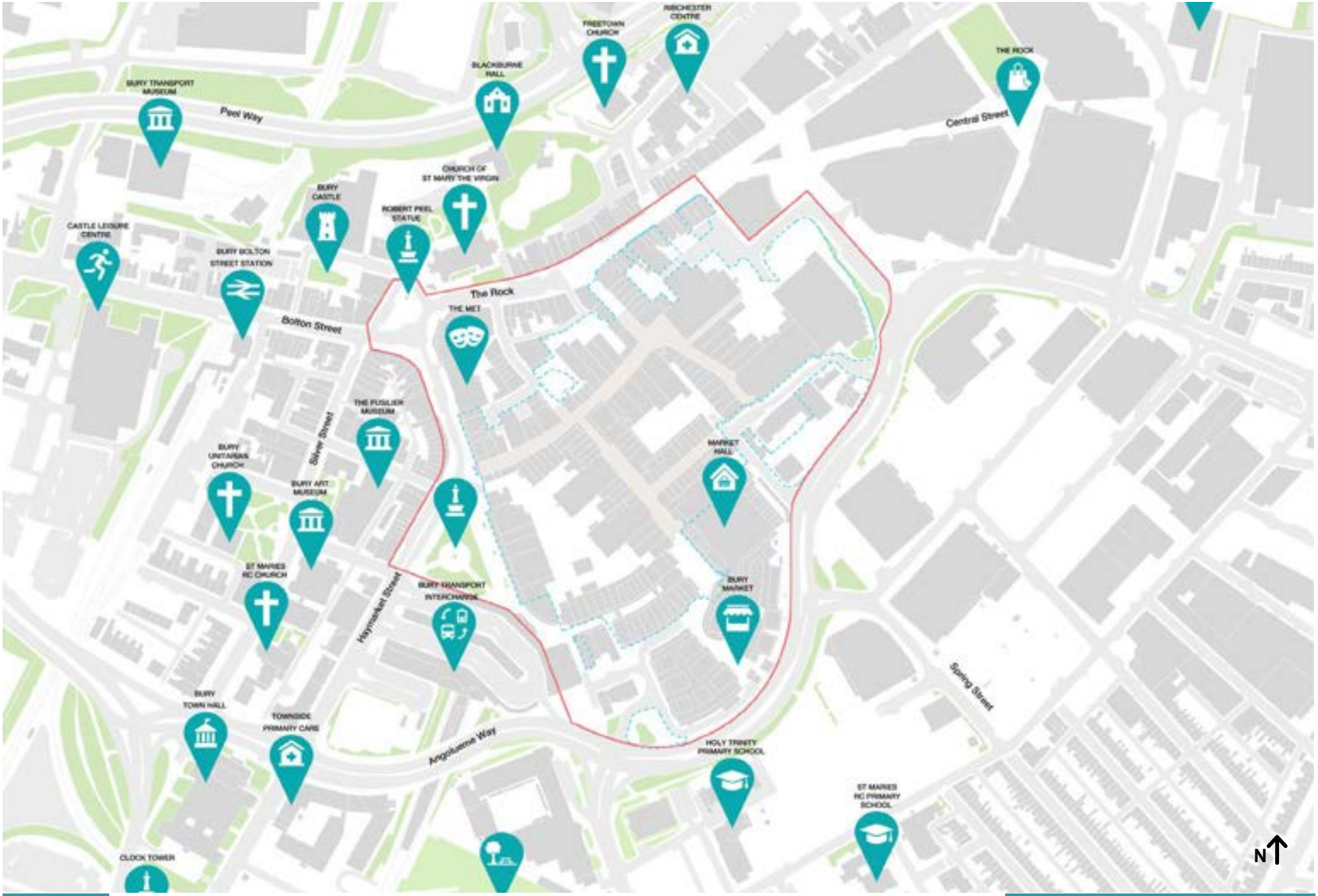
St Mary's Church

The Spire of St Mary's is a Grade I listed building and the highest point of the town centre. It has been the main ecclesiastic centre of the town since the 18th century, and is considered one of the main viewpoints for the town. Due to its location in the west of the town centre, it is mostly surrounded by 19th century buildings which respond well and complement the church's setting. However, as is common across a lot of the town centre, the Rock is characterised by 20th century buildings designed to recreate the patterns and symmetry of the older buildings but overall detract from the visual amenity of the historic buildings.

Bury Interchange

Bury Interchange is the major transport hub for the town, acting as a Metrolink, bus, taxi and bicycle interchange, facilitating access to wider Greater Manchester region and the rest of the country. However, in its current configuration the layout requires users to cross four lanes of bus traffic prior to entering the town centre, resulting in a poor visitor arrival experience. This is further exacerbated by the harsh, hard landscaped area of public realm by Kay Gardens, which is the first image visitors see of Bury after fully exiting the interchange.

This experience will be remedied with funding from the City Regional Sustainable Transport Fund. In 2023, a £45m redevelopment of the Interchange was announced which will improve the configuration and include full multi-modal integration for the station, including capacity for bus, cycle and active travel parking, Metrolink and vertical circulation upgrades.


BURY TRANSPORT MUSEUM
Peel Way
BLACKBURNE HALL
FREETOWN CHURCH
RIBCHESTER CENTRE
THE ROCK
Central Street
CASTLE LEISURE CENTRE
BURY CASTLE
ROBERT PEEL STATUE
CHURCH OF ST MARY THE VIRGIN
BURY BOLTON STREET STATION
Bolton Street
The Rock
THE MET
THE FUSILIER MUSEUM
Silver Street
BURY UNITARIAN CHURCH
BURY ART MUSEUM
MARKET HALL
ST MARIES RC CHURCH
Haymarket Street
BURY TRANSPORT INTERCHANGE
BURY MARKET
Spring Street
BURY TOWN HALL
TOWNSIDE PRIMARY CARE
Angouleme Way
HOLY TRINITY PRIMARY SCHOOL
ST MARIES RC PRIMARY SCHOOL
CLOCK TOWER
N





1// The Met
2// Church of St Mary
3// Bury Transport interchange
4// Bury Art Gallery
5// Kay Gardens
6// Bury Market
7// Bury Bolton Street Station
8// Robert Peel Statue













Key Views

There are a number of key views around the Framework Area, relating to the Spire of St Mary's Church and the hills of the Pennines. These are:

The view to the Spire of St Mary and Kays Garden from:

- Knowsley Street;
- Foundry Street; and
- Rochdale Road.

The view to the hills from Bolton Street.

The view to the hills from The Rock.

KEY

X - Views to hills

X - Views within site





















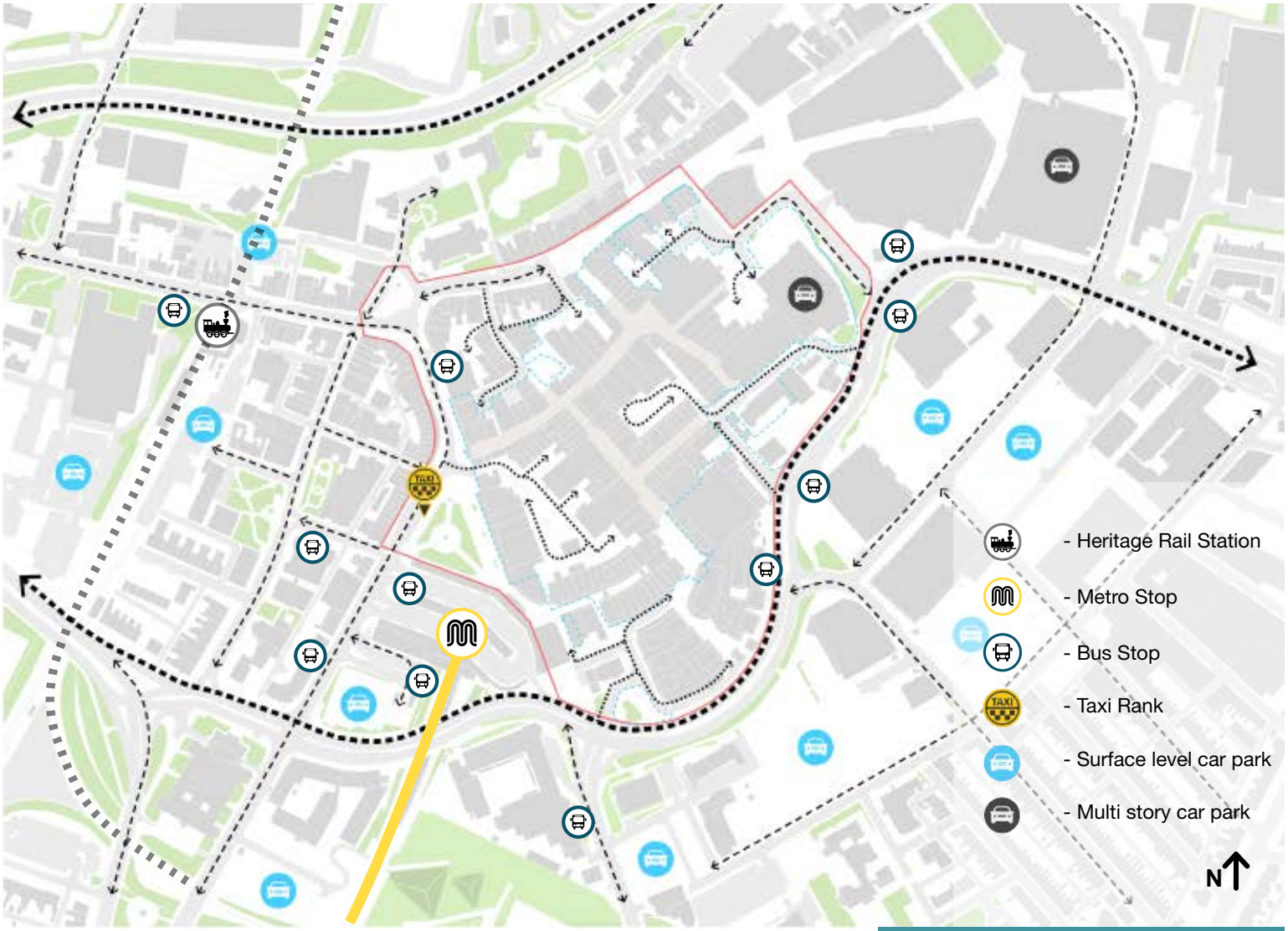
Key View Analysis

3.4 Connectivity + Public Realm

Existing Connectivity - The Framework Area benefits from excellent bus and Metrolink transport links. To the south-west of the Framework Area is Bury Interchange, an integrated bus and Metrolink transport hub. Additional bus stops to serve the Framework Area exist on Heymarket Street, the A58 and Bolton Street.

Vehicular Access - The Framework Area benefits from good vehicular access around the Mill Gate centre, with access to the multistorey car park from the A58. There are also surface level car parks south of the A58, which serve the Mill Gate shopping centre and Bury Market.

Taxi Ranks - Taxi ranks provide an invaluable function for those wanting to visit the town centre who may not be able to drive, or indeed afford a car; which is especially pertinent considering the demographic of visitors to the Framework Area (particularly the Mill Gate and Bury Market).



Vehicle Connectivity Analysis Plan

Service Yards

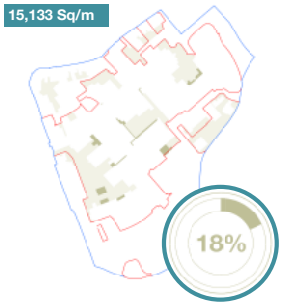
The Mill Gate is dominated by Service Yards, making up in the region of 18% of the site area. Some of these are very large designed to accommodate a higher frequency and demand by tenants on vehicle type that does not match modern retailer requirements.

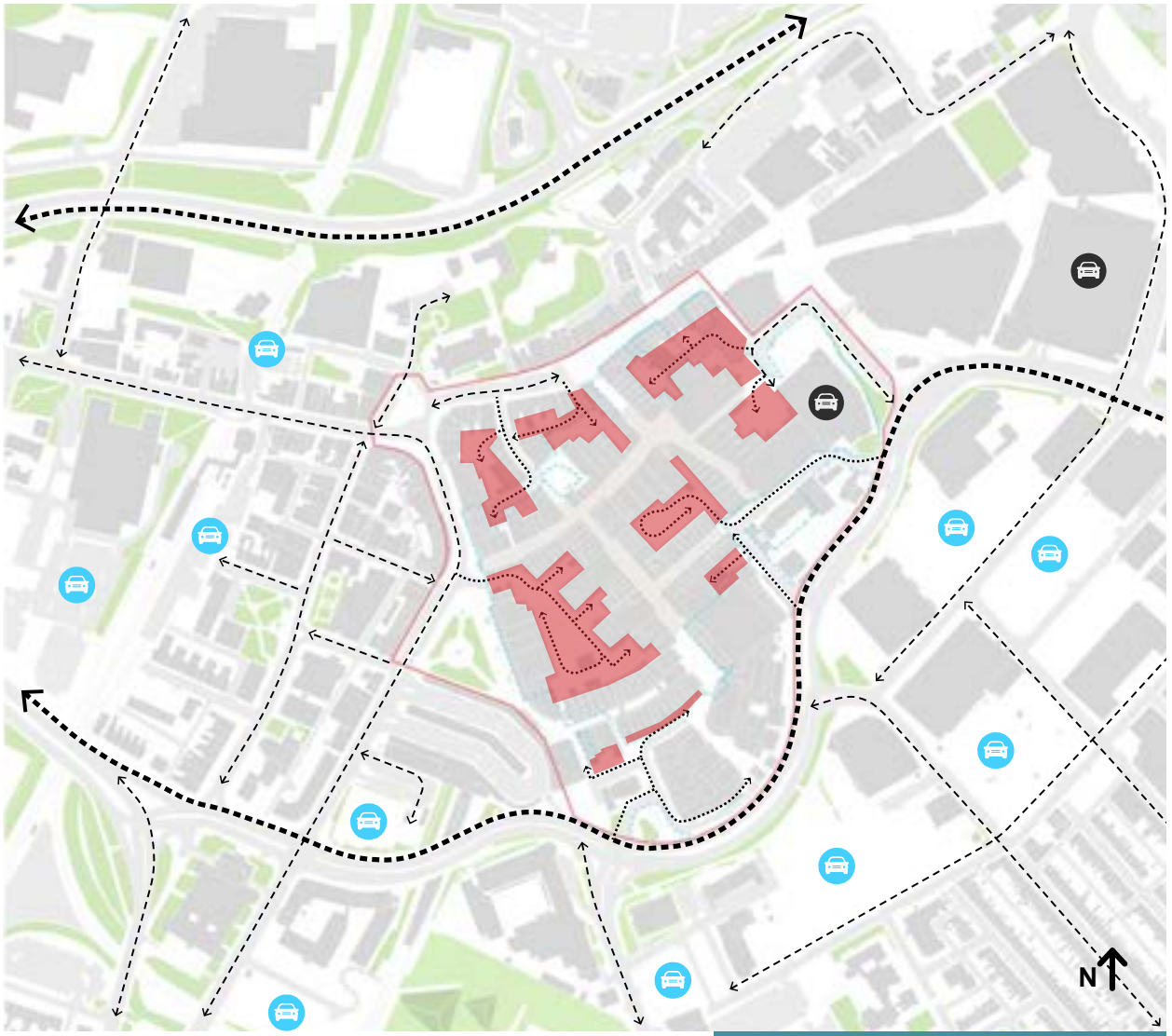
The Mill Gate includes an over-concentration of service yards and areas which detract from the quality of the environment. The extent of service areas impacts connectivity throughout the Mill Gate and hinders wayfinding and legibility.

The Market is served by the entrance to Market Parade from Angolume Way and is a key asset to ensure deliveries are not impacted by any redevelopment works. The 1960's Market Hall houses a large basement that is accessed via lift, one to the north as indicated on the plan, and the other within the market hall aligned to Market Parade access.

Existing Vehicle Service Zones

15,133 Sq/m





Pedestrian Permeability

Pedestrian permeability through the Framework Area is poor. Multiple entrances and exits into similarly looking arcades results in poor orientation for visitors who are not familiar with the shopping centre.

Cyclists and dog walkers cannot enter the Mill Gate, therefore for these visitors the Framework Area presents a significant barrier to movement through the town centre.

Cycle Infrastructure

There is no dedicated cycle infrastructure around the Framework Area. Market and Heymarket Streets do not have separate cycle and pedestrian paths, resulting in a mix of users on the footpaths.

Whilst the Rock, to the north of the Framework Area, is largely pedestrianised, there is currently no separation for pedestrians and cyclists. The public realm is also used by servicing vehicles for the Mill Gate, resulting in an unpleasant visitor experience.

The Mill Gate does not permit bicycles within the shopping centre, further restricting the cycling accessibility and permeability through the Framework Area. There is, however, a dedicated cycle parking hub at the Interchange, containing 39 secure cycle spaces.

Opening Hours

The Framework Area makes up a significant proportion of Bury town centre, particularly the Mill Gate and Market. However, these locations are constrained by relatively old-fashioned opening hours.

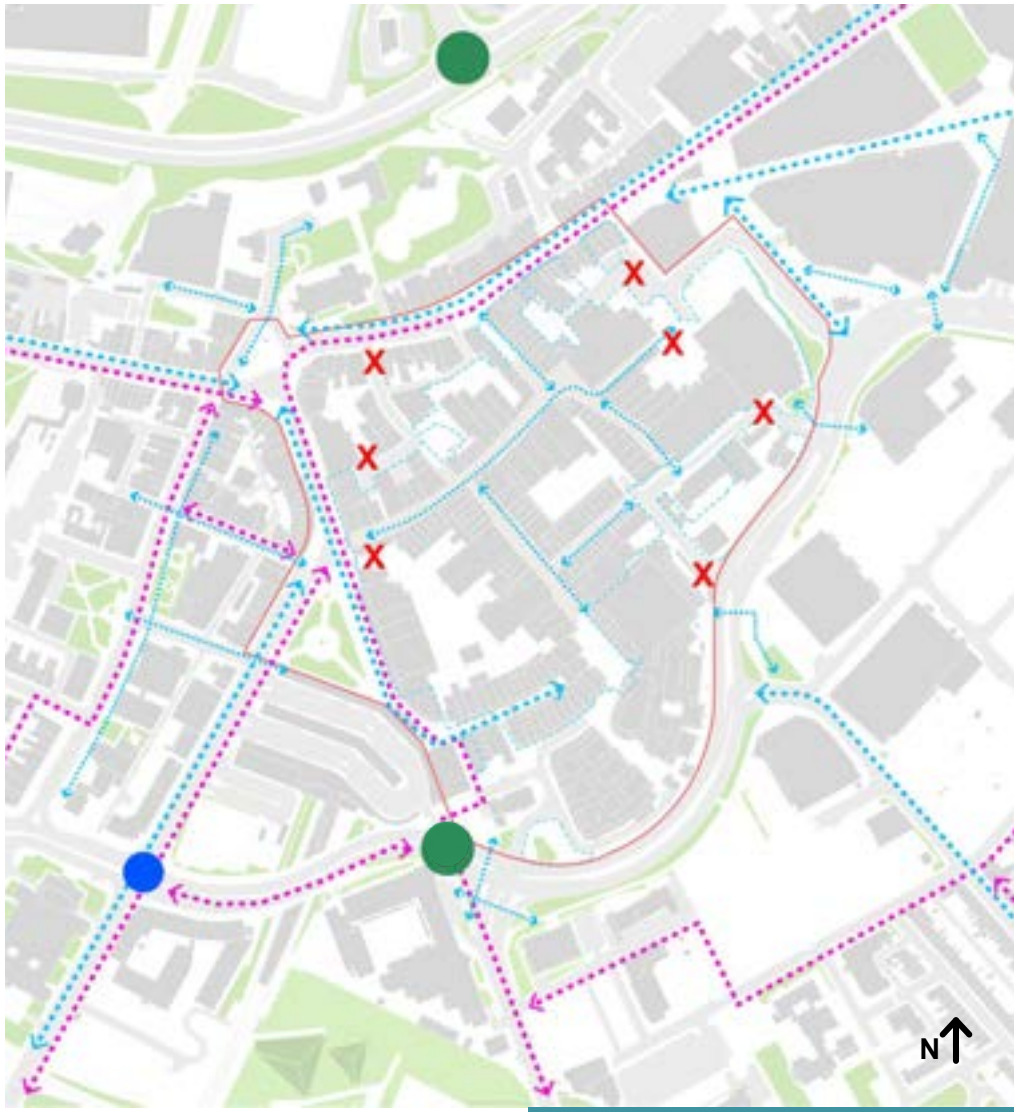
The Mill Gate is open between 09:00 and 17:30, which limits the leisure and food & beverage offerings which can be operated successfully within those fixed parameters. This opening time is shortened by a further hour on Sundays and Bank Holidays.

The Bury Market Hall is open for a similar length of time; between 09:00 and 17:00 on Monday to Saturday. The open-air market, which operates on Wednesday, Friday and Saturday, operates the same hours. All functions in the Market are closed on the Sunday.

These opening hours constrict the proportion of the town centre which can be visited following 17:00, and results in large portions of the town centre being impassable in the early mornings and evenings.

Key

- Opportunity to improve junction
- Plans to improve junction
- X - Weak Entrance to Mill Gate
- Pedestrian Route
- Future Bee Way Route



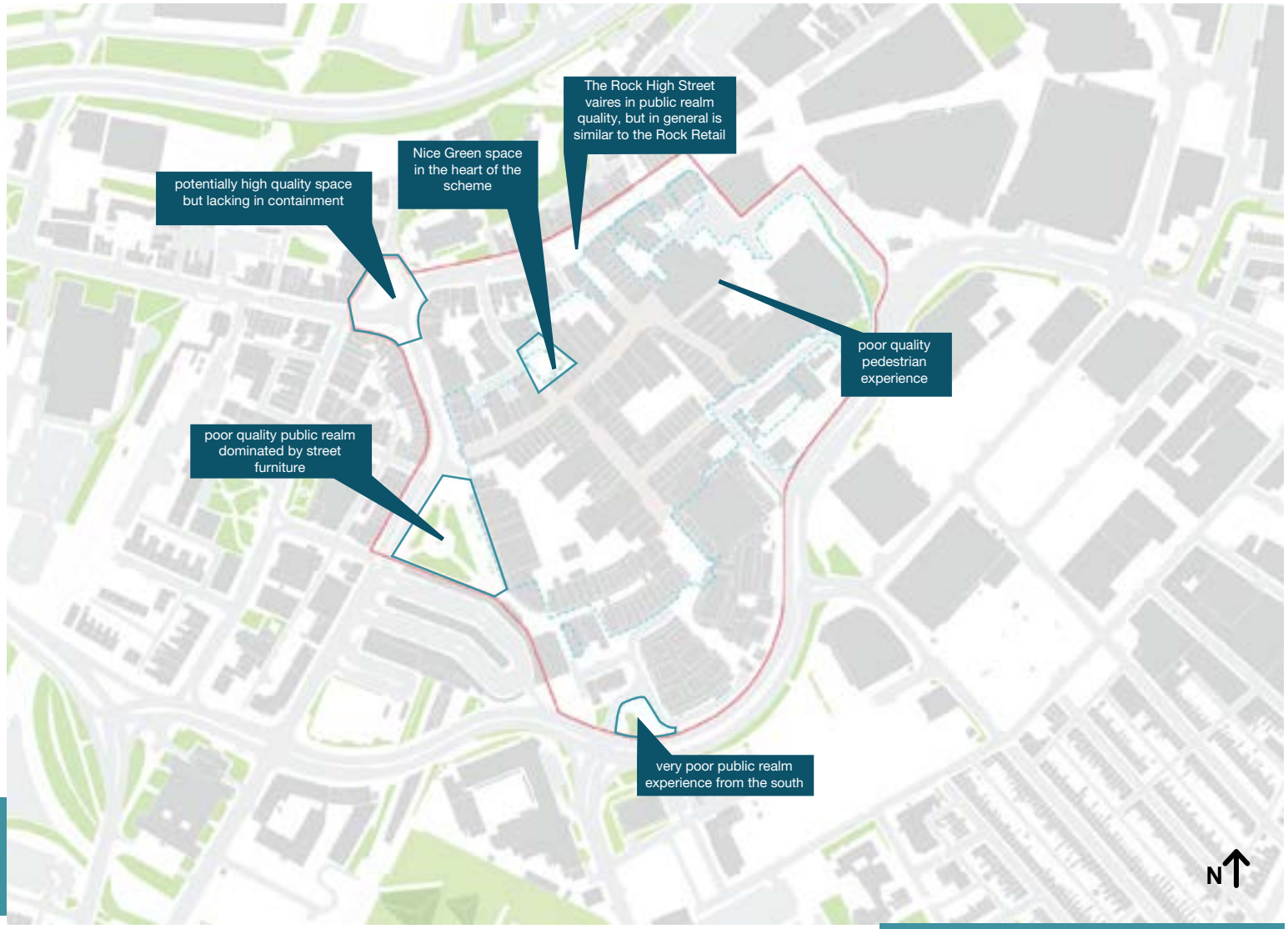
Pedestrian Connectivity Analysis Plan

Public Realm

To date, the Framework Area has limited high-quality public realm.

- **Kay Gardens,** to the west of the Mill Gate centre, features an over-provision of seat furniture and highway infrastructure with limited shelter for visitors. In its current configuration, the space lacks animation and is not regularly used. Antisocial behaviour is common in Kay Gardens.
- **Lions Gardens** is a small area of public realm in the north-west of the Mill Gate, however this comprises only of two low-quality trees and two benches on a hard landscaped platform, and is adjacent to a servicing yard and high walls containing plant machinery.
- **The Rock,** to the north east of the Framework Area, is pedestrianised and features a consistent architectural design with the Rock High Street, however this area is intercepted by vehicular access to the Mill Gate multistorey car park and does not permit access around the south-eastern perimeter of the Framework Area.

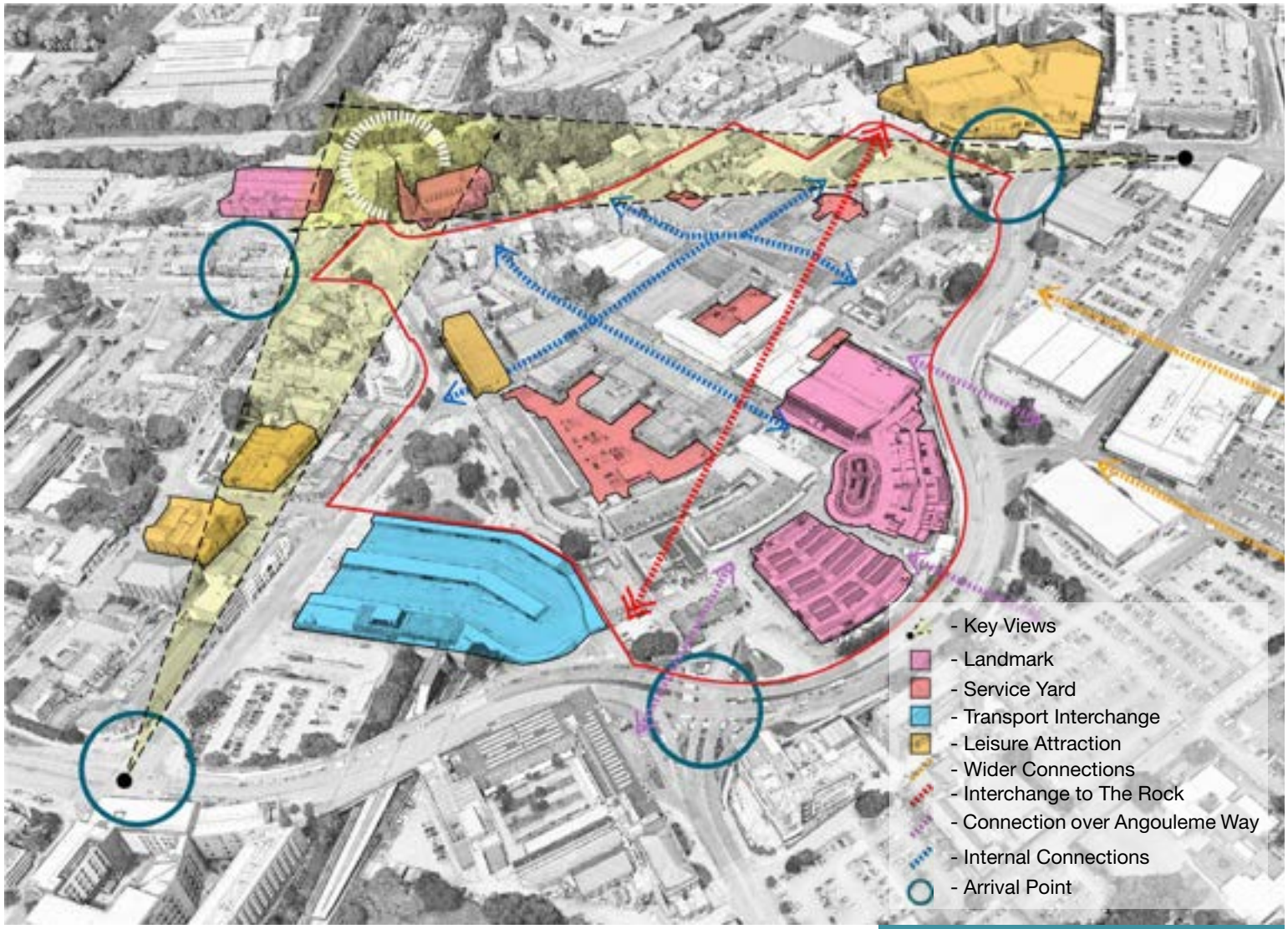
Overall, the public realm around the Framework Area results in a poor quality pedestrian experience.



3.5 Site Opportunities

The following opportunities have been identified:

- Enhance link to The Rock and pedestrian experience.
- Address the overprovision of retail space, and introverted nature to connect with the wider streets.
- Reduce the extent of service delivery yards
- Enhance the unique Mill Gate identity with links to Bury landmarks.
- Diversify retail and small provision of leisure.
- Create unique interface with the 'creative quarter' and independent market traders.
- Create a link to the college and education.
- Reduce the dominance of highways infrastructure to Kay Gardens and town centre.
- Enhanced connections across Angouleme Way.
- Enhance connections to wider communities drawing them into the centre.
- Address the poor arrival experience from the Interchange into the town centre.
- Diversify the evening and night-time economy – bringing in family orientated experiences.
- Address the dominance of hard public realm and lack of provision of open space to encourage people to dwell.





Development Principles.

4

4.1 Vision

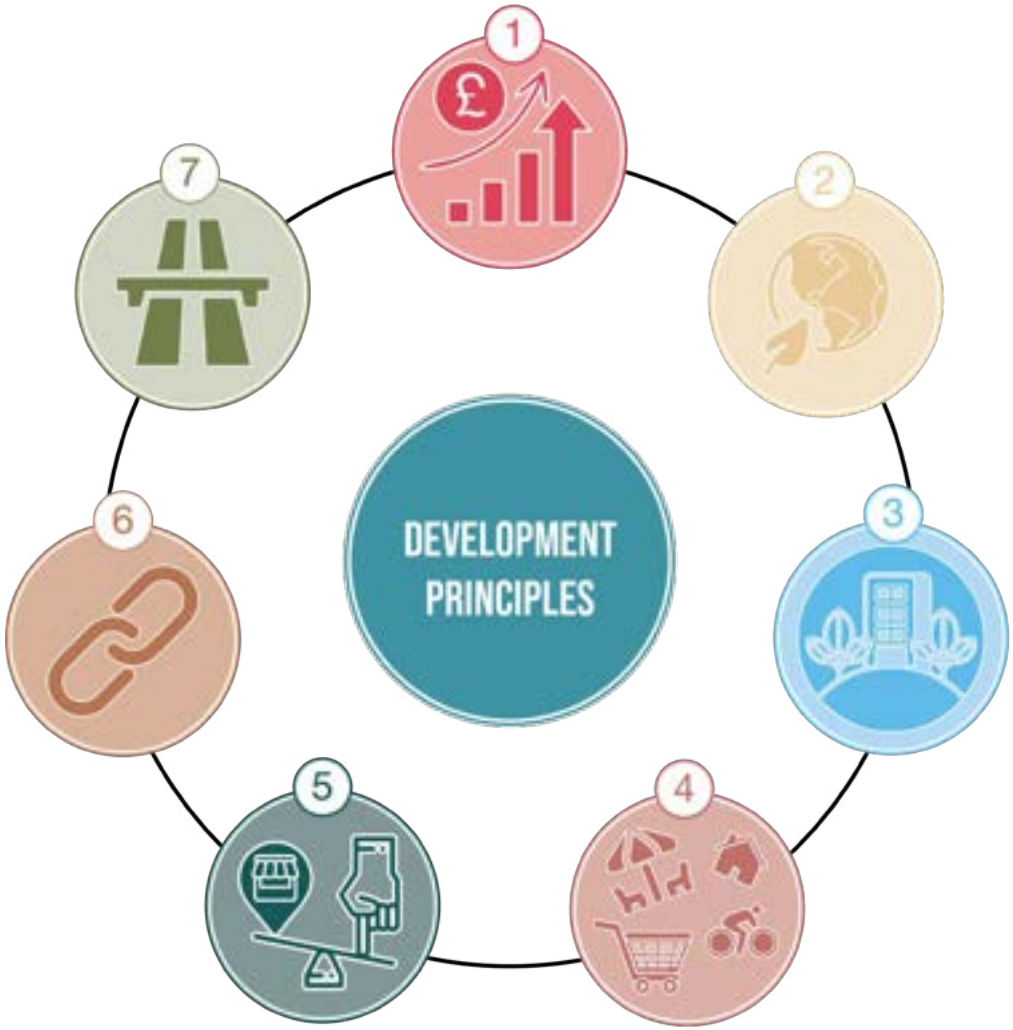
Key Development Principles

The Framework is underpinned by an illustrative masterplan, which does not seek to prescribe the exact scale and quantum of future development and interventions.

The illustrative masterplan is presented in the context of an overarching vision, key objectives and associated outcomes. The development principles seek to guide future proposals whilst providing sufficient flexibility to respond to the current and future market context and trends.

Development Principles fall within the following priority considerations:

1. Catalytic Regeneration Investment and Inclusive Growth
2. Embedding Environmental Sustainability
3. A Sustainable Residential Community
4. Diverse Town Centre Offer
5. Leveraging the market
6. Key Connections, Public Realm and Placemaking
7. Transport and Highways



Mill Gate.

Future proposals will need to consider and respond to development principles at an early stage in the planning process. Where there is a need to depart from these components, it will be necessary to justify why this is expected or appropriate, and how the proposed approach maintains or enhances the Framework's overall vision and objectives.

4.2 Catalytic Regeneration Investment + Inclusive Growth



The Mill Gate has and will continue to be a significant asset for the local community. The evolution of the Mill Gate and future investment represents a key opportunity for future proposals to unlock inclusive growth and support the broader regeneration, economic and social ambitions and opportunities for Bury Town Centre.

Opportunities to maximise inclusive growth should respond to Bury's Let's Do it! Strategy which establishes Bury's 2030 Vision to achieve rapid economic growth and reduce levels of deprivation. Future proposals should seek to maximise socio-economic benefits for the whole community, including enhancing the quality of life for existing and future residents and workers.

The Framework seeks to enhance Bury's strategic role within Greater Manchester by creating an attractive and vibrant town centre hub through the delivery of sustainable development that blends a dynamic retail, leisure and residential offer. The evolution of the Mill Gate will support future growth by strengthening the town centre's reputation as sustainable and attractive place for future investment within and beyond the Framework boundary.

To maximise inclusive growth and deliver catalytic regeneration , future proposals must consider and contribute to the following:





RESPONDING TO LOCAL NEED

- Future proposals should build upon the success of the existing town centre and established local community, informed by local voices and evidence. Proposed uses will need to complement and not compete with existing town centre uses to ensure the continued success of the wider town centre.
- Opportunities should be maximised to provide flexible buildings and public spaces that adapt to the changing needs of the community over time.
- Future proposals will be expected to demonstrate how they will support the Council's 'Let's Do It Strategy 2030'. Proposals will be encouraged to identify opportunities to address identified socio economic needs of the existing and future community through appropriate provision of social infrastructure on-site, or exploring options to work with social infrastructure providers.

Opportunities for positively addressing social infrastructure needs may include:

- Provision of new high quality homes;
- Expanded retail offer that appeals to all members of our community;
- Supported pathways to education and employment;
- Facilities to improve community health and wellbeing; and
- Integrating with an accessible sustainable transport network within the site and beyond the Framework's boundaries.



QUANTUM AND UPLIFT

- Future proposals should be designed to support the delivery of other development plots, and future investment opportunities, with careful consideration given to: building orientation; location of entrances; introduction of active frontages; and the role and function of the public realm.
- Explore opportunities to strengthen permeability and connectivity with existing and future communities, by ensuring key routes, connections and entrances are appropriately designed and located. This includes needing to ensure that as part of future proposals connections are future-proofed to support the continued regeneration of the town centre across all phases of the Framework, and wider future phases beyond the Framework area.
- A critical mass of uses is expected to ensure the beneficial impacts of the regeneration proposals can be maximised across the Framework area and the wider town centre. Current target quantums per use for the masterplan are as set out as follows - these quantums are based on the indicative (illustrative) masterplan and associated analysis, and this amount of floorspace and mix of uses is overarching vision and objectives underpinning the Framework.
- Residential Units: 700 units
- Ground Floor Commercial: 7,000 sqm

N.B. existing commercial floorspace: 20,000 sqm

Please note these quantums are indicative targets.

- Whilst the quantum per use may flex over the long term delivery of the masterplan to respond to evolving demands, market trends and site specific considerations (including townscape), the proposed quantum reflects the current optimum based on strategic context and market dynamics to support the vision and objectives whilst ensuring viability and deliverability.



HEALTH AND WELLBEING

- Prioritise health and well-being by providing opportunities for recreation, promoting active travel and enhancing connections with nature. This should be achieved via a network of defined high quality public realm and amenity spaces, delivering key pedestrian and cycle routes and natural landscaping.
- Residential proposals should support the delivery of a range of safe and accessible spaces that encourage play, physical activity and social interactions, whilst responding to the needs of all current and future members of the community.
- Ensure that the needs of the future residential community can be met through a clear understanding of existing social infrastructure (health care and education) capacity and delivering additional provision, where there is an identified need and where feasible to provide- recognising the importance of a healthy community in underpinning a sustainable, successful and vibrant place.
- Future proposals will seek to recognise the need to support improved health outcomes for the local community to overall health and wellbeing. Future proposals therefore should explore opportunities to deliver innovative, creative solutions and infrastructure to improve the physical health of the local community e.g. public spaces designed to encourage physical activity.



DIGITAL INFRASTRUCTURE

- Consideration should be given to incorporating digital infrastructure into the public realm, to improve the function and management of these spaces.
- Where possible, proposals should seek to support and enable the upfront delivery of digital infrastructure, such as fibre optics, electric vehicle charging and Wi-Fi and 5G services for public spaces.



CONNECTIVITY - INTEGRATED AND FUTURE PROOFED

- Future proposals should show how they will help achieve the objectives of the Town Centre masterplan. This means that proposals should be designed in a way that considers future development sites and opportunities both within the Framework Area and the wider town centre. The Mill Gate masterplan should seek to make best use of existing assets and high quality development within the Framework Area, to enhance the town centre's reputation as the most attractive, accessible and vibrant town centre in North Manchester. In this context, proposals will need to:

» Explore opportunities to strengthen physical and visual connectivity to surround communities to ensure proposals integrate with the existing town centre and surrounding communities by exploring opportunities to strengthen physical and visual connectivity.

» Increase connectivity and permeability across the Framework Area to strengthen links with other parts of the town centre. Where connections are not possible in the short term, proposals should demonstrate how they have been designed to facilitate future strategic connections when these opportunities come forward; such as improving permeable connections across Angouleme Way to communities to the south and east of the Framework boundary.

- Ensure proposals integrate with the existing town centre and surrounding communities by exploring opportunities to strengthen physical and visual connectivity.
- Future proposals should carefully consider the incorporation of active frontages, building entrances and orientations to ensure an integrated and future-proofed approach is taken. Proposals should seek to explore opportunities to address the following challenges:



CONNECTIVITY - INTERGRATED AND FUTUREPROOFED

» Enhance the arrival experience around Kay Gardens and the Interchange.

» Increase pedestrian and cycle infrastructure between the Interchange / western parts of the town centre and the Rock in the east.

» Improve the arrival experience and entrances to the south of the Framework to soften the existing hard boundary resulting from the dominance of Angouleme Way.

» Rationalise servicing yard and surface car parking provision, where possible, and improve access arrangements into the Mill Gate multi-storey car park, to encourage reduced vehicle movements within the town centre



EDUCATION AND TRAINING OPPORTUNITIES

- Provide ongoing opportunities for community engagement, to deliver active participation that positively shapes and the masterplan and future proposals. Active local engagement and collaboration should be promoted throughout all stages of the planning process, including early design development

- Accessible and inclusive engagement opportunities should be provided to maximise participation, to allow and encourage all members of society. This approach should seek to ensure a fair and accurate representative of local voices.



ENGAGING LOCAL VOICES

- Proposals should enhance the relationship where possible with the existing community, whilst responding to future redevelopment and regeneration opportunities. Future proposals should carefully consider the incorporation of active frontages, building entrances and orientations to ensure an integrated and future-proofed approach is taken.

  Proposals should seek to explore opportunities to address the following challenges:

- Enhance arrival experience around Kay Gardens and the Interchange.

- Increase pedestrian and cycle infrastructure between the Interchange / western parts of the town centre and the Rock in the east.



DELIVERING SOCIAL IMPACT

- Proposals should adhere to an overarching social impact strategy to be produced for the Mill Gate, which will provide a focus on social outcomes, that is focused on the following values: environmental sustainability, a fair society, cultural vibrancies and, health and well-being.

- Future proposals should demonstrate measurable outputs against the Mill Gate's social impact strategy. This should include drawing out how future proposals respond to the following development principles: responding to local need, health and wellbeing, connectivity (integrated and future proofed), education and training opportunities, engaging local voices, homes of choice, supporting infrastructure, function of the public realm, connectivity and permeability, sustainable and active travel.

4.3 Embedding Environmental Sustainability

Bury Council has set a target for the Borough to be carbon neutral by 2038. To help, Bury's Climate Action Strategy, identified a number of actions required to achieve its targets, including:

- Generating and sourcing all our local energy needs form zero-carbon and renewable sources.
- Ensuring all our buildings are carbon neutral
- Facilitating a complete transition to fossil fuel free local travel.
- Buying, using and disposing of goods in a sustainable way.
- Increasing woodland cover and protecting and enhancing soil environments and natural habitats.
- Helping our businesses to transition to carbon neutrality.



KEY PRINCIPLES

Future proposals must consider and comply, as encouraged, with the following sustainability principles:

- Connections to surrounding green spaces and waterways should be maximised.
- Ensure the built environment and open spaces are future proofed by delivering durable and flexible solutions that can respond to changing behaviour patterns and market demands.
- All development should be carbon neutral.
- Opportunities to retain the existing built form should be explored. Proposals should support the decarbonisation and adaptive reuse of existing buildings. This should include installing renewable technologies to enhance energy efficiencies.
- Renewable energy and low carbon technologies must be assessed and incorporated as feasible – this should include exploring opportunities to introduce solar panels, solar water heating, air, water and ground source heat pumps and hybrid /dual energy use heating systems.
- Electric vehicle parking spaces must be included in all new developments that include car parking.
- All proposals must consider future climate change challenges and impacts, including those associated with more extreme weather events to ensure climate resilience.
- In the interest of resilience, the public realm must have longevity and be flexible enough to change with habits of users whilst responding to climate crisis.
- Landscaping and building materials must be durable and carbon-conscious.
- Explore opportunities to maximise the functionality and use of digital infrastructure to optimise building efficiencies and reduce operational emissions from the built form.
- Future proposals must deliver a robust and future proofed sustainable drainage strategy, that responds to flood risk and drainage issues. The strategy should ensure that a coordinated approach is taken across the Framework area, which must ensure that the requirements and opportunities within future plots are suitably considered and accounted for.
- The hierarchy of attenuation should be applied with opportunities to incorporate rain gardens, swales and permeable paving being supported. The incorporation of attenuation tanks should be limited to where absolutely necessary.

HABITAT ENHANCEMENTS + BIODIVERSITY

- Proposals will be demonstrate a minimum 10% biodiversity net gain ('BNG') from January 2024 as a requirement of the Environment Act 2021which PfE includes a policy. It is anticipated that the different phases will have varying levels of opportunity to deliver a greater or lesser BNG. When considered overall, it is considered that the masterplan will deliver a betterment of the regulatory requirement for 10% BNG.

- Proposals to enhance the public realm at Kay Gardens, Market Place and Market Square should explore opportunities for urban greening to enhance biodiversity and ecological value. The planting of trees and soft landscaping should be carefully considering, recognising the potential to provide shade and shelter from the sun, wind and rain.













4.4 A Sustainable Residential Community







Proposals should seek to diversify the offer in Bury Town Centre, including through the introduction of new residential accommodation.

Future proposals should seek to ensure, where encouraged, that an appropriate quantum, mix and proportion of new residential accommodation is provided. This should include demonstrating clear consideration of the proposed residential offer's positioning within the Framework area.

As plots come forward within the Framework area, there should be an ongoing review of residential accommodation to be delivered or delivered to date. This should seek to ensure that the overarching vision and objectives, to deliver a mixed use town centre hub, are met. Consideration should also be given the proportion and quantum of residential development identified as part of the indicative masterplanning exercise, whilst recognising the illustrative nature of the Masterplan.



HOMES OF CHOICE

- Future residential developments should seek to provide the mix, tenure and amenities to create a multi-generational community and become home to members of the existing community, as well as people seeking to relocate from the city centre and other parts of the conurbation. This should seek to provide homes that are attractive to those at different stages of life and affordable to a range of incomes, by delivering a variety of homes including different types, sizes and layouts.
- Proposals should deliver multi-generational community housing, including provision to support the working population, young professionals and families to attract a more diverse residential population.
- Flexible, adaptable homes should be delivered to ensure accommodation is accessible to all, and resilient over time.

QUALITY

- Residential uses will be a core component of creating a sustainable mixed use town centre hub. Residential developments should optimise the use of development plots in order to make best use of the town centre's finite land supply, deliver new high quality homes, maximise their potential contribution to placemaking and help ensure proposals are deliverable.
- Higher density residential development will be encouraged within the framework. The scale and massing of residential development should enhance legibility, whilst protecting key views.
- New residential developments should be designed to raise the standard of new homes within Bury and serve to create one of the most attractive new residential areas in Greater Manchester. New residential development should demonstrate that the scheme will deliver high quality homes, as required by the local policy and guidance. To ensure the delivery of high quality residential development future proposals should have regard to the following key considerations:
  - » Optimal separation distances
  - » Building footprints
  - » Limiting continual building frontages
  - » Internal plot space for communal / shared amenity uses
  - » Building orientation to limit environmental impact – wind microclimate, daylight and sunlight, overshadowing (of public realm / public spaces)
  - » Building entrances
- Proposals should directly support the delivery of placemaking objectives through high quality landscaping, active frontages, outdoor amenity and playspaces.
- New homes should strive to be at the forefront of low carbon energy efficient design to reduce environmental impacts through both construction and occupation. Innovative design solutions and construction methods will be encouraged.
- High architectural quality and expression should support local identity and legibility, whilst responding to site specific environmental considerations.



AMENITY

- Future residential proposals should be considered in the context of delivering a cohesive masterplan, where residential streets successfully integrate with the wider retail and commercial function of the town centre, whilst preserving residential amenity and character. Careful consideration should also be given to the proximity of residential uses with other non-residential uses and infrastructure to protect the amenity of future residents.
- New development should have regard to privacy, microclimate (wind, sunlight, daylight, overshadowing), noise, refuse management, safety and vehicular movement to ensure residential amenity is maintained. Future proposals should also achieve appropriate separation distances and seek to avoid north facing single aspect units to protect amenity, ensure privacy and enhance sunlight and daylight penetration.
- Where active uses are proposed, careful consideration should be given to the location of any noise generating uses and occupiers to minimise amenity impacts on nearby sensitive receptors (including residents). This should be carefully considered alongside the benefits of promoting and maintaining a vibrant streetscape during the day and evening.



RESIDENTIAL STREETS AND SPACES

- Key routes and spaces around existing and new residential-led plots should be supported by ground floor uses that activate streets to encourage footfall and provide natural surveillance. Where active ground floor uses such as convenience retail and food and beverage uses are not appropriate, active frontage should be maximised through good design e.g. positioning of entrances and windows. This may include exploring opportunities to deliver duplexes and town houses to generation activation at the ground floor level.
- Residential proposals should ensure that future residents have access to sufficient provision of dedicated open space. Access should be provided to a range of safe and inclusive spaces that respond to the needs of a diverse residential community. This should provide opportunities for local residents to stay, play and interact, fostering social interactions and community cohesion.



SUPPORTING INFRASTRUCTURE

- Residential developments should be designed to maximise benefits of key connections, such as active travel routes, access to public realm and outdoor amenity spaces, as well as the close proximity to a range of facilities and services.
- Proposals for residential development should ensure adequate provision of convenience retail and social infrastructure is provided to respond the daily needs of the local resident community.

















5.5 A Diverse Town Centre Offer



SUSTAINABLE RETAIL AND LEISURE STRATEGY

Proposals should seek to diversify Bury Town Centre's offer, by supporting the consolidation of retail provision and introducing new uses such as residential, food and beverage, leisure, local amenities and workspace. Opportunities should be explored to create spaces that respond to the needs of local residents, workers and visitors, whilst providing opportunities for different groups to come together, to support social interactions and foster community cohesion.

Proposals should seek to enhance Bury Town Centre's reputation as a local and regional attractor as a key cultural, leisure and shopping destination, supported by existing anchors including Bury Market and the East Lancashire Railway.



Bury Town Centre is an established cultural, leisure and shopping destination, at a local and regional level. Future proposals within the Framework Area should seek to enhance this aspect of the Mill Gate Centre and Market, and bring forward regeneration that will help to underpin the long term vitality of the town centre.

Curated mix of uses //

- An overarching sustainable retail and leisure strategy should be prepared to ensure an appropriate quantum, mix and proportion of different retail and leisure uses within Mill Gate.
- Future units and spaces should carefully consider their positioning within an overall commercial occupier and lease strategy for the Mill Gate. The strategy should seek to attract a diverse range of occupiers which positively contribute to the vibrancy and identity of the local area.
- This should be reviewed periodically to ensure provision responds to changing demands and market trends.

Complementary offer //

- Future retail provision within the Mill Gate should seek to provide uses and services that are not readily available on the internet, such as specialist stores which are more experience driven to support the diversity, vibrancy and attractiveness of the town centre.
- Future retail provision should suitably respond and recognise the role and function of The Rock which is occupied by a number of chain high street brands.
- Future proposals should carefully consider existing leisure and food and beverage occupiers and how they will complement other leisure and retail areas within the town centre, such as The Rock and the Market.
- Proposals should acknowledge the need to retain existing occupiers and service providers that support the civic function and needs of the local community.

Daytime + night-time economy //

- A successful evening and night-time economy will enhance Bury Town Centre, helping to create a stimulating destination which will provide a safe, secure environment, with a vibrant choice and rich mix of entertainment and activities. Proposals should ensure that the introduction of evening and night-time uses are appropriately located and are attractive to a range of age groups, including families.
- Proposals should seek to contribute to a carefully curated mix of uses that enhances the existing daytime function of Mill Gate and introduces new uses and occupiers that support a vibrant evening and night time economy. These uses should seek to increase dwell time within the Mill Gate by introducing food and beverage and leisure uses that encourage activity at different times of day.



SUSTAINABLE RETAIL AND LEISURE STRATEGY

Flexible / accessible + affordable spaces

- Proposals should support a sustainable and inclusive economy by providing a range of floorspaces and unit types that are affordable and attractive to local start-ups and businesses.
- The design and flexibility of retail units should seek to maximise the potential to attract independents and ensure the long-term occupancy of spaces.



ACTIVE FRONTAGES

- Proposals should deliver ground floor uses that promote activity and vibrancy to draw people through the area at different times of the day.
- The provision of active street frontages should positively respond to the urban design principles, objectives of the Illustrative Masterplan and Public Realm and Landscaping Strategy. This should including aligning to the hierarchy of streets set out in this Framework.
- Proposals should ensure that streets and public spaces benefit from passive overlooking and incorporate active frontages to increase natural surveillance, deter crime and anti-social behaviour, and promote vibrancy at the ground floor level.
- This should include retaining existing areas of active frontage and maximising active frontages onto key routes and public spaces. Spill out space within key areas of the public realm (will be encouraged where this supports ground floor uses and the function of the public realm.
- Proposals will need to consider and respond to the hierarchy of streets and role and function of the public realm to ensure that active frontages are appropriately located.
- Proposals should ensure that adequate, curated lighting is provided to improve perceptions and feelings of safety by creating a welcoming, attractive environment for all.



VITALITY AND FOOTFALL

- Proposals should explore opportunities to attract new retailers and leisure occupiers, that will support the vibrancy and vitality of the town centre.
- Pop-up events and temporary meanwhile uses will be supported where these will enhance activation within the public realm. These should seek to positively contribute to local identity, social cohesion, inclusive growth and the health and wellbeing of the wider community. Pop up events and temporary uses provide low cost opportunities for local enterprises, businesses and community groups to engage with the wider public, creating an accessible and inclusive range of uses.
- Opportunities to activate key spaces and routes may include cultural / art installations to enhance the vibrancy and vitality of these spaces all year round.
- The Flexi-Hall will be a key asset for the local community, by providing a multi-functional event space that supports market stalls, pop up trading, live performance and community events. Proposals should recognise this and ensure opportunities to utilise the Flexi-Hall are maximised, for example by delivering complementary ground floor uses, and an enhanced area of public realm to maximise vibrancy and footfall in the surrounding area.







4.6 Leveraging the Market

There is an opportunity to build upon the success of the iconic Bury Market and strengthen Bury Town Centre's reputation as a local and regional destination for culture, leisure and shopping. The market plays a key role in the local economy, providing a space for local traders and start-ups to operate. Bury Market is a unique iconic part of the town centre's heritage. Future proposals should seek to enhance the role and function of the market by taking into account feedback from Mill Gate retailers, market traders, shoppers and visitors. This includes feedback received during the consultation of this document and further consultation to be undertaken as part of future detailed planning applications



ENHANCE FUNCTION

- The Market is an iconic part of Bury's heritage and identity, serving as a key attractor for locals. Future proposals should seek to enhance the role and function of the market through identifying the immediate and long term needs of traders, shoppers and visitors.
- The future retail strategy for the Framework Area will consider how best to support the market as a central component of the long-term success of the town centre, identifying key areas for investment to improve servicing and operational infrastructure, as well as ways in which the market's role in the town centre can be expanded through a more diverse offer and providing opportunities for home-grown businesses and entrepreneurs. In doing this proposals should seek to maximise opportunities to develop and grow Bury Market to increase wider footfall and diversify the potential customer base.
- Proposals should maximise opportunities to deliver active ground floor uses around Market Square; for example introducing food and beverage uses with associated spill out space in the public realm.
- Opportunities should be explored to promote increased activity on market and non-market days, capitalising on the strength of Bury Market's vibrant reputation. This may include a number of activation initiative to drive footfall, including pop-up events and meanwhile uses. This should seek to increase the days and hours of opening to expand the attractiveness and positive contribution to the vibrancy of streets during the week.
- Meanwhile uses and pop-up events should ensure that opportunities to utilise the Flexi-Hall are maximised. The Flexi-Hall will provide a key asset for the local community, by providing a multi-functional event space that supports market stalls, pop up trading, live performance and community events.
- Proposals should seek to enhance the function and identity of the market and its surroundings through public realm enhancements (e.g. soft landscaping) and other light touch interventions that create a more visible, prominent gateway into the town centre.
- Proposals should seek to improve the attractiveness and functionality of the public realm and ground floor uses around the indoor market, to unlock (potential) future investment to enhance the role and function of the indoor market.





LOCAL TRADERS AND START - UPS

- Proposals should support existing market uses and traders, whilst providing new opportunities for local traders and start-ups to operate. This may include the installation of new kiosks and stalls within the public realm to increase the provision of affordable and attractive trading spaces.
- Recognising the important role existing traders and stall holders play in reinforcing Bury Market's iconic reputation, future proposals will need to proactively engage with and consider the needs of this group.
- Proposals will need to recognise the importance of maintaining the existing market to support continued operations and minimise impact. Where proposals have potential to impact operations, there will be a need for proposals to demonstrate how they will maintain or enhance the function, accessibility and quality of the market – this should form part of detailed future planning applications.
- Where phased delivery results in direct impacts on the market proposals should provide temporary facilities to minimise impacts and maintain on-going operations.






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4.7 Key Connections, Public Realm + Placemaking





HIGH QUALITY ARCHITECTURE

The creation of a successful place is supported by a foundation of a well-connected network of public spaces, and a strong sense of local identity and character. The public realm plays a key role in enhancing local character and distinctiveness, providing health and wellbeing benefits and responding to environmental and climate change challenges. To harness local identity and distinctiveness there is an opportunity to celebrate local heritage by leveraging key assets and views.

- Future development should be of high quality design, and positively contribute towards local character and identity. Design should support the re-establishment of a rich urban grain and provide visual interest to the townscape to further reinforce a strong, attractive identity for the area.
- Proposals should avoid large areas of inactive, uniform frontages at the ground floor level.
- Proposals should be designed to provide a human scale and welcoming, intimate streetscape for residents, workers and visitors.
- Proposals should seek to ensure that a complimentary palette of materials is used, by undertaking detailed design studies as part of future planning applications. These design studies and supporting analysis should provide a contextual response on the site-specific proposals, in order to deliver sufficient diversity and local distinctiveness. This should be undertaken further to precedents shown in Section 5 (Illustrative Masterplan – Development Areas) of this Framework.
- Proposed materials palettes will need to carefully consider the historic environment, namely the relationship with the town centre conservation area and Listed Buildings.
- Proposals should support the establishment of a shopfront design guide or key design principles to ensure a sense of cohesion and strengthen local identity.
- As part of the design development process, future proposals should explore opportunities to deliver distinctive architectural styles that positively contributions to the quality and identity of the townscape. This could include providing variety in architectural rhythm and block form to vary the streetscape, and support the creation of well-connected high quality spaces for pedestrians and cyclists.
- The design of future proposals should respond to the function of spaces at the ground floor, with careful consideration should be given to building layouts and orientations. This should included appropriately positioning primary entrances, active frontages and back of house areas



6. Key Connections, Public Realm + Placemaking



CELEBRATE LOCAL HERITAGE

- Future development should be designed to integrate with, correspond and complement the historic elements of the town centre.
- The Framework presents an opportunity to create a key east-west route between Bury's historic quarter and the Mill Gate centre, allowing more accessible pedestrian permeability between historic assets such the East Lancashire Railway to the west of the town centre and the more recent retail development at The Rock, to the east of the town centre.
- There is an opportunity to celebrate Bury Market, as well as its history and contribution to the town of Bury, through phased redevelopment of the Framework Area, including the revitalisation of its public realm to encourage visitors and traders to spill out and animate the space.
- The design of future development should demonstrate that it contributes to the varied architectural character of Bury Town Centre, and should be specifically adapted to its context and setting



LEGIBILITY AND WAYFINDING

- Proposals should seek to celebrate key views and frame local landmarks and landmarks to aid legibility and enhance local identity.
- Architectural design should deliver a rich urban grain and townscape interest to provide a strong and attractive identity for the area. This should aid permeability and legibility within the area.
- Future proposals should explore opportunities to deliver new landmark buildings that support strong townscape principles and make a positive contribution to local character and identity.
- Any new landmark buildings should be located at gateway locations, key junctions or to terminate key views or vistas, to support wayfinding and legibility. Some buildings may be distinctive in their own right, for example through architectural design or scale, to support the creation of new local landmarks.
- Appropriate signage and wayfinding infrastructure should be located at key nodes and around key routes and spaces to support wayfinding and legibility. An overarching wayfinding and signage strategy should be prepared for the Framework area to ensure future proposals deliver a holistic and consistent approach.
- The incorporation of public art within the public realm will be promoted animate spaces, whilst supporting legibility and wayfinding. Landscaping features should also be included to support wayfinding and positively contribute to local identity



HIERARCHY OF STREETS AND SPACES

- A clear hierarchy of streets and spaces should be established to improve wayfinding and connectivity, and to encourage increased pedestrian and cycle movements. This may include exploring opportunities to deliver duplexes and town houses to generation activation at the ground floor level.
- The hierarchy should manage vehicle movements within the pedestrian realm whilst acknowledging the requirements of the emergency services, taxis and commercial service operators.
- Opportunities to rationalise service "loops" should be sought to minimise the frequency of vehicles within the public realm and create greater opportunity for traditional streets where "carriageway is king", to be replaced by servicing solutions that are subtly incorporated into the street scene. Beyond these service routes, future proposals should seek to ensure that access is be limited to emergency vehicles only. This includes public realm in the vicinity of the market where creating a safe place for pedestrians is a priority.

6. Key Connections, Public Realm + Placemaking



HIERARCHY OF STREETS AND SPACES

- The hierarchy of streets should provide a range of active travel routes whilst other key roles and functions of streets and spaces. Proposals should seek to prioritise pedestrian and cycle movements, in the context of supporting active and sustainable travel.
- Future proposals should seek to promote residential streets as being more compact than those with commercial frontage. Pedestrian amenity, including ground floor defensible space, should be prioritised in locations where residential uses are concentrated.
- In busy peripheral areas, the street hierarchy should embrace long term connectivity. Where proposals are located adjacent to Angouleme Way, opportunities should be explored to deliver well considered pedestrian nodes to support permeability with adjoining areas to create a welcoming arrival to the Mill Gate. At Market Street and Haymarket Street, a shift in priority should be sought to see the passage of vehicles through pedestrian realm rather than vice versa.



FUNCTION OF THE PUBLIC REALM

- Regardless of the mode of travel, the public realm should create a welcoming arrival and legibly guide visitors around the town centre.
- Urban greening should be a priority for all streets and spaces, ranging from individual specimen trees in constrained locations to strategic corridors of ecologically rich soft landscape where possible.
- Establish a well-defined and accessible pedestrian route connecting four pivotal anchors: The Interchange, The Rock, The Market and Mill Gate Shopping Centre.
- The public realm should relate to the identity and place characteristics of Bury and ground floor uses should be coordinated and complementary to the external environment.
- Proposals should ensure that the public realm is welcoming, accessible and inclusive by addressing the needs of all of the diverse community. This should include provision of play space, suitable seating and adequate lighting to create a comfortable and attractive environment.
- Develop proposals that prioritise inclusivity, catering to the diverse needs of the community. This includes the provision of play spaces, comfortable seating, and adequate lighting to create an inviting and attractive environment.
- Explore opportunities in the public realm design to encourage community engagement with green and blue infrastructure, thereby contributing to the well-being and health of residents.
- Design of the external environment should embrace opportunities to increase biodiversity across the Mill Gate.
- Meanwhile and temporary uses should utilise public spaces that are suitably designed to accommodate the short, mid and long term aspirations for the proposals.
- Create a public realm that encourages both visitors and residents to spend extended periods in the town, offering a diverse array of attractions, opportunities for shopping, socializing, play, and recreation.
- Seamlessly integrate the market within any new development proposals while allowing flexibility for the market to expand into outdoor spaces as needed.
- Create residential streets that are green spaces with a strong pedestrian focus, fostering opportunities for play and social interaction. These streets should maintain proximity to primary pedestrian thoroughfares while promoting a tranquil environment.

6. Key Connections, Public Realm + Placemaking



GREEN AND BLUE INFRASTRUCTURE

green infrastructure + the public realm //

- Future proposals should maximise the relationship with nature, wildlife and the outdoors, by providing opportunities for the local community to access and interact with existing green spaces beyond the Framework Area and through the creation of a series of well-connected green spaces.
- Proposals should explore opportunities to deliver natural play areas, outdoor education, growing spaces and outdoor events to maximise engagement and interaction with the natural environment.
- Proposals should ensure that the public realm is a comfortable and attractive place for local residents, workers and visitors to stay, play and interact. Microclimate (sunlight, daylight, overshadowing, wind) consideration should therefore be considered when determining building orientations and / or developing detailed landscape proposals.
- To maintain the quality of the public realm a long term management strategy should be prepared for the Mill Gate. Future proposals should ensure that the hard landscaping treatments are robust and durable, and that soft landscaping makes a positive contribution the space all year round.



CONNECTIVITY AND PERMEABILITY

- Proposals should seek to enhance connectivity and accessibility across the town centre and beyond in to communities beyond the boundary by integrating into the existing movement network, exploring opportunities to delivery more crossings and connections into Mill Gate.
- Proposals should seek to enhance pedestrian and cycle permeability by addressing existing barriers to access, which should include exploring opportunities to reduce street clutter and de-engineering of highway infrastructure.
- Vehicle movements into the Mill Gate should be limited and opportunities should be sought to actively remove vehicles from the Framework Area by appraising the width of streets, rationalising on-street parking, limiting the number, size and frequency of servicing vehicles, rebalancing the existing highways infrastructure (where appropriate) and creating a consistent and distinguished streetscape language and identity, where pedestrian movement is prioritised.



















4.8 Transport and Highways

To promote a well-connected, attractive town centre it will be important to concentrate vehicle movements around the edge of the town centre. Vehicle movements associated with servicing and waste and private vehicle usage therefore require careful consideration. The design and operation of proposals is therefore of fundamental importance to the success of the Mill Gate, in creating an improved environment that maximises permeability and connectivity. Interventions to de-engineer the highway network will also play a key role in maximising the quality and function of key public spaces and supporting connections between existing surround communities and the town centre.



SUSTAINABLE AND ACTIVE TRAVEL

- Future proposals should seek promote multi-modal sustainable travel by integrating into the public transport network, including by leveraging the benefits associated with the Interchange. Strong connections to tram stops and bus services should therefore be prioritised to encourage active travel and public transport usage. This will be important to promote low carbon movement and reduce reliance on private vehicle use.
- Future proposals should seek to ensure alignment with planned infrastructure by Bury Council and TfGM, including the new Interchange, segregated cycle ways, Quality Bus Corridors, Active Travel and Streets for All proposals.
- Future proposals should seek to enhance the active travel network by delivering pedestrian and cycle friendly routes that are accessible and attractive. This should include delivering increased cycle parking provision and infrastructure which should integrate into the Greater Manchester Bee Network and National Cycle Routes.

Future proposals should adhere to the following:

1. Provide high levels of sufficient, secure cycle parking provision for residents and workers.
2. Provide visitor cycle parking, which should be carefully integrated into the design of the public realm. All cycle parking provision within the public realm should be appropriately located to maximise passive surveillance.
3. Cycle parking should include provision for non-standard cycles (such as adapted cycles, trailer, tricycles, tandem bikes, cargo bikes etc.) and for charging e-bikes.

- Opportunities to deliver a mobility hub within the Framework should be explored. This should include dedicated secure cycle parking and parcel delivery function that serves local residents and workers.

HIGHWAYS

- Opportunities to de-engineer the highway within key public square should be explored to enhance the quality of these spaces. In particular, this should be explored as part of any public realm enhancements to Kay Garden and Market Place.
- Proposals to de-engineer the highway network should create improved gateways and connections into the town centre.
- Future proposals should explore opportunities to proactively engage and work with Bury Council and TfGM to fully explore the possible reprofiling of Market Street to provide a new access into George Yard and an enhanced pedestrian experience at Kay Gardens, Market Street and Market Place.
- Future proposals should seek to support and advocate future opportunities to reprofile Angouleme Way in order to significantly improve pedestrian and cyclist connections in the long-term.

7. Transport and Highways



SERVICING AND WASTE

- A new servicing and refuse strategy shall be produced and implemented for the Mill Gate. The strategy should maximise opportunities to reduce the amount of servicing space, restrict servicing and waste vehicle movements at certain times of the day, and simplify associated routing.
- Proposals should seek to ensure that servicing and waste arrangements not compromise the quality and function of public spaces.
- Opportunities should be explored to rationalise provision of servicing yards within the Framework area to improve permeability and connectivity, whilst also maintaining the function of servicing areas for retailers and traders. This should support the establishment of a clear of routes whilst providing a more pedestrian and cycle friendly environment.
- Main building entrances should usually be located on primary routes, with servicing and waste activities being directed to more secondary routes. This should promote the vibrancy of key streets and spaces.
- Where possible, servicing and waste arrangement should be focused at the peripheries of the Framework area, close to key arterial routes, such as Angouleme Way. This should seek to minimise servicing and waste vehicle movements within the Framework area and reduce conflict with pedestrian and cycle movement. Where necessary, servicing and waste activities should be directed to more secondary routes, away from primary routes to promote the vibrancy of key streets and spaces.



CAR PARKING

- It is expected that the existing MSCP will be retained to ensure accessibility and inclusivity where individuals may be unable to rely on more sustainable modes of travel. This approach recognises the key role Mill Gate and Bury Town Centre will continue to play as a central hub for surrounding communities.
- Opportunities should be explored to improve the quality of the environment around the existing MSCP. Proposals should seek to maximise opportunities to improve access and egress from the MSCP and minimise the impact of existing vehicle routes within the centre of the Framework area.
- Future proposals should demonstrate the parking demand and how alternative provision or solutions can be delivered that reduces reliance on private vehicles within the area over time. This may include retaining existing levels of car parking within the Mill Gate MSCP, reduce car parking provision within service yards should be and redirecting this to the MSCP.
- Any additional demand for car parking provision should be managed via management of existing assets and ambitious Sustainable Travel Plans. Where there is a clear identified, evidenced need for additional car parking this should be integrated into the design of buildings to limit visibility or visual impact from key routes and spaces.
- Parking provision should include appropriate accessible parking provision.
- Opportunities should be sought to provide of electric vehicle charging points within the Mill Gate MSCP.
- The potential to develop a Framework-wide parking strategy should be explored. This should present opportunities to reduce parking usage within the town centre and promote more sustainable travel. This may include the introduction of a car club which provides an effective way of reducing private car ownership and limiting associated parking.




Electric Vehicle Charging Station








#BeeNetwork







Illustrative Masterplan.

5

5.1 Work to Date

Baseline Analysis

The Framework provides the foundation for regeneration proposals, whilst ensuring that the necessary flexibility is provided to enable the detailed design of each plot to be refined. The flexibility of the Framework is important to allow future development to respond to changing market conditions, technological advancements, design innovation, technical analysis and environmental considerations, throughout the long-term delivery phase.

This chapter summaries how key constraints, opportunities and how surrounding developments have informed the masterplanning process. This has accumulated in identifying the possible forms and functions across the Framework area.



Bury Mill Gate - Aerial

5.2 Understanding the Opportunity

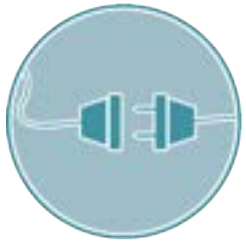


Key Considerations

The Framework has been developed to accord with national, regional and local planning policy and guidance.

This Framework has been published for public consultation. Following the conclusion of the consultation period, responses will be reviewed and considered. The illustrative masterplan will be updated, where required, to respond to public consultation comments.

The illustrative masterplan is one interpretation of how the vision, objectives and development principles detailed within the Regeneration Framework may come forward. On that basis, the illustrative masterplan does not represent a fixed or prescriptive position for future development proposals to accord with.



Disjointed town centre



Lacking sense of arrival



Poor pedestrian experience



Limited choice for pedestrians and cyclists



Vehicle dominated environment / dominance of service yards



Lack of sense of place to support wayfinding



Pre-dominant value retail led offer in the town centre and Mill Gate



Lack of engaging F&B, experience-led retail & Leisure



poor evening offer - lack of diverse evening activities

5.3 Developing the Masterplan

RF Evolution

Throughout the preparation of The Framework has been through an iterative design process which has been informed by a range of technical studies and engagement with key stakeholders. The illustrative masterplan has sought to respond to detailed site analysis and stakeholder feedback whilst according with The Framework's vision, objectives and development principles.

As part of the ongoing design development process for the illustrative masterplan, the following considerations have been worked through by the JV, design team and key stakeholders (including Bury Council officers):

- Retention and demolition of the existing Mill Gate shopping centre.
- Diversification and consolidation of the existing Mill Gate offer.
- Massing of the proposed residential offer.
- Refinement of the key block forms and layouts, around the existing service yards.
- Existing operational servicing and access arrangements and requirements for commercial occupiers within the Mill Gate.
- The servicing strategy and associated requirements for Bury Market (indoor) and Market Hall (indoor).



5.4 Illustrative Masterplan

Approach

The illustrative masterplan for the Mill Gate brings together important existing characteristics of the Framework Area alongside new considered design strategies that respond to key existing site problems. The proposed masterplan significantly enhances the area and helps it achieve high potential - contributing positively to Bury's 2030 Let's Do it! strategy place making aspirations.

The illustrative masterplan represents an approach to delivering the requirements of the JV, responding to the principles set out in the Bury Town Centre masterplan in 2022 and in response to community and stakeholder engagement throughout the Framework design process.



5.5 Urban Design Principles



VISION OBJECTIVES



Inclusive Growth



High Quality Public Realm and Connections



Enhance the Residential Offer



Diversify the Town Centre Offer



Celebrate and Enhance Bury Market



Embed Environmental Sustainability

DEVELOPMENT PRINCIPLES



Catalitic regeneration investment + inclusive growth.



Embedding environmental sustainability



A sustainable residential community.



A diverse town centre offer.



Leveraging the Market.



Key connections, public realm + placemaking.



Transport and highways.

URBAN DESIGN PRINCIPLES

1 A Connected Town Centre

2 A New Green Public Spine

3 Reinstating the Historic Urban Grain

4 Creating New Views

5 Diverse Town Centre

6 Clear Street Hierarchy

7 Consolidated Parking and Servicing

8 Enhancing Town Centre Movement

9 A new interface with the Market and Flexi-hall

10 An Enhanced relationship to The Rock

11 Enhancing the permeability to Angouleme Way

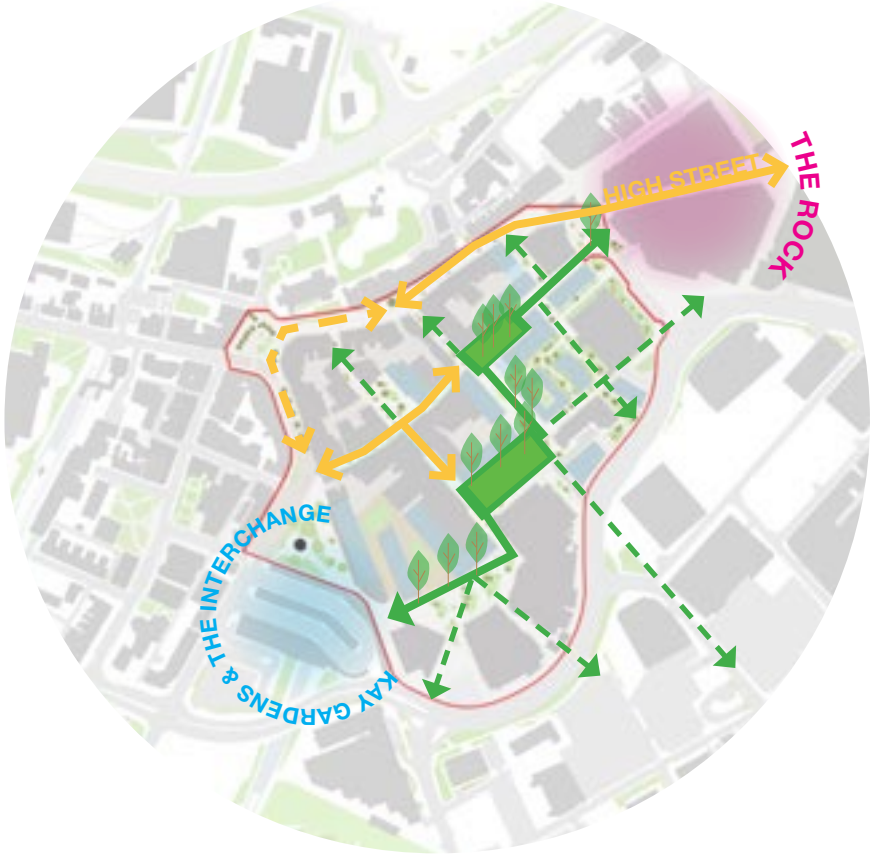
12 Re-purposing the Mill Gate

Key Interventions



1. A connected TOWN CENTRE

Mill Gate is at the heart of Bury but today is somewhere that doesn't feel like a part of the town rather a shopping centre which opens and closes - a key urban design principal is to make this part of the town act as a connector, drawing in surrounding streets and character areas, and become part of the town centre 24/7 365 days a year.



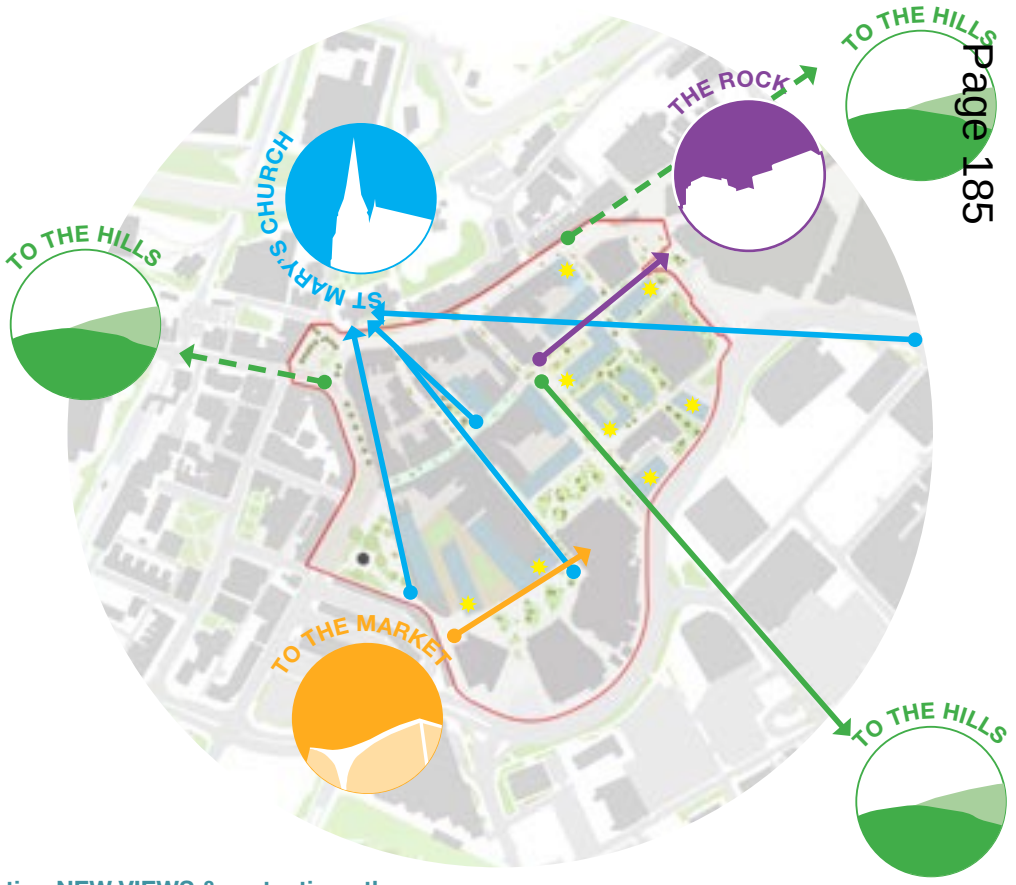
2. A NEW GREEN public spine

As part of this connected town centre a key design principal is to establish a new public route from the Rock to the Interchange creating new permeability and new circuits of movement. This is intended to offer a new green route in a place that today is dominated by buildings and service yards, creating a new public asset for the town and a connection from the hills to the market.



3. Reinstating the HISTORIC urban grain

The Mill Gate still holds some of the historic street pattern that connects to the wider surrounding streets. Through establishing a series of streets and squares, and reduction in the internal glazed mall and service yards, it is intended that these connections are re-established and a old piece of the town is reinstated.



4. Creating NEW VIEWS & protecting others

Key views have been identified to transform the Mill Gate from internal shopping centre, to somewhere that could only be in Bury. These include to the surrounding hills and key visual landmarks such as St Mary's Church, the 1960's Market Hall and Market, The Rock and Kay Gardens and the Town Hall. New Landmarks offer the ability to transform the sense of arrival at the Mill Gate and Bury Town Centre

✷ LANDMARK



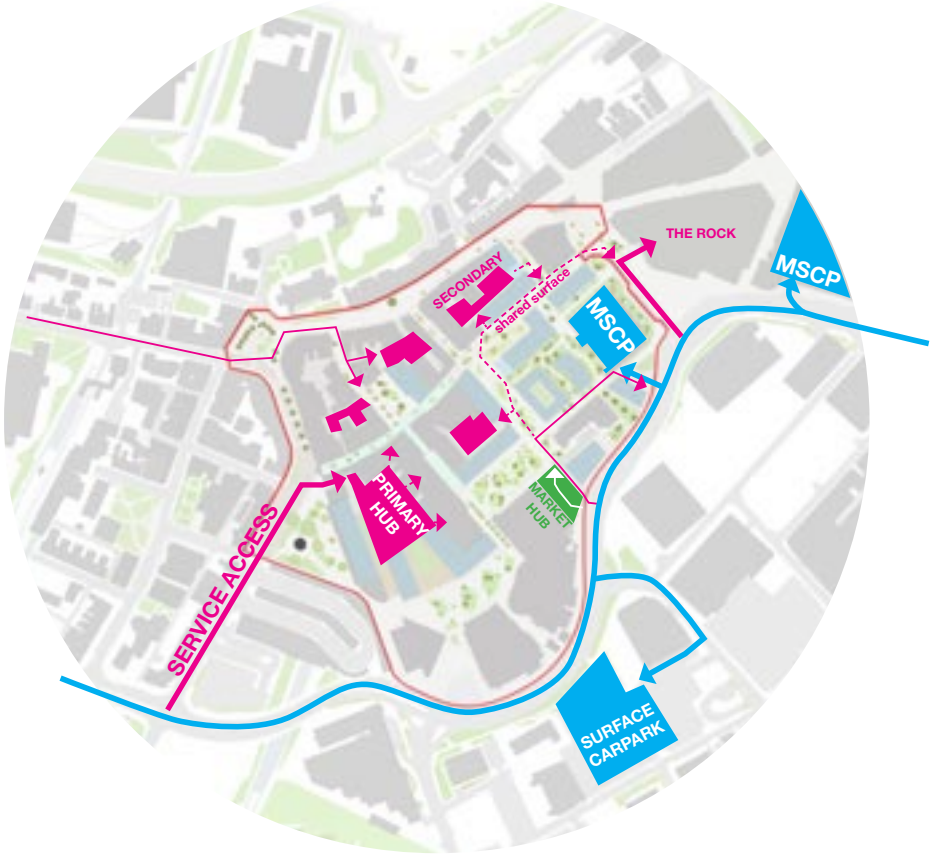
5. A New DIVERSE TOWN CENTRE

A key element of the proposals is to diversify the uses within the Mill Gate, with potential for new homes, workspace, and hotel over ground floor active uses including; fashion, lifestyle, convenience and leisure alongside new restaurants, cafe's and bars and other town centre amenities supporting sustainable life styles, health and well-being.



6. CLEAR street hierarchy

Creating a street pattern that is clear for users is a key principal. Primary streets will focus on public facing high street uses with retail, restaurants and leisure as a focus creating streets that feel vibrant and active. Secondary streets will continue this public facing activity, but be focused on smaller scale users and streets that connect. Tertiary streets will be focused on being active but quieter with a residential focus. As the Mill Gate is today the intention is that the streets will retain their pedestrianised nature, but with limited vehicle use.



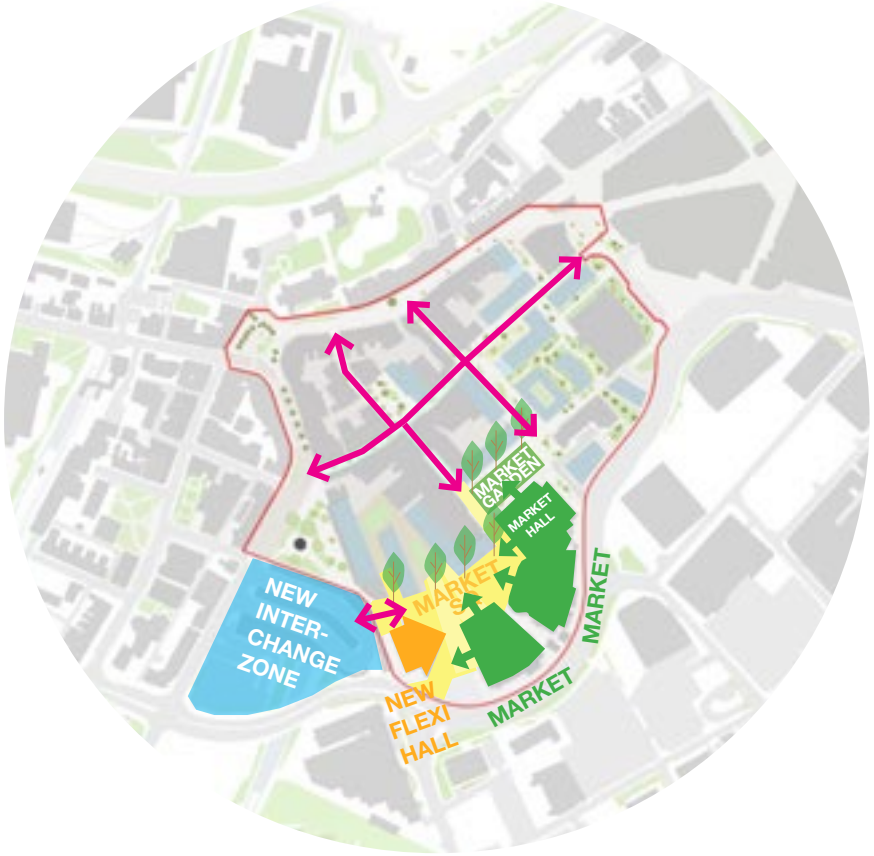
7. CONSOLIDATED parking and servicing

The existing Mill Gate Centre is dominated by servicing access, and the consolidation of this is a key aspect of the proposals to enable a more permeable and pedestrian focused setting. With the opening of streets shared surface access is intended to secondary service yards. Parking access to the Mill Gate carpark is intended to be amended to be accessed from Angouleme Way allowing space to the key interface with The Rock to be transformed into pedestrianised landscaping.



8. ENHANCING town centre MOVEMENT

Part of reconnecting Mill Gate back into the town centre is enhancing movement along existing routes. Kay Gardens is a key arrival space in the town and one that is negatively impacted by highways and street furniture creating a space that feels unloved. Market Place is seen as a key opportunity to capitalise on heritage architecture and views to the hills, and also to enhance the connection to the traditional Rock high street which is today subdivided by parking and planting.



9. A NEW INTERFACE with the market and flexihall

The Market is a key asset to the Town Centre and with the proposed new Flexi Hall and future improved Interchange this area is more important than ever to ensure the front door to Bury is looking its best and providing the benefits to the town centre as a whole. A new Market Square is proposed to act as a more flexible space for market days and a new Market Garden to the north of the Market Hall to allow new public space that can be green and welcoming to all no matter what day of the week.



10. An ENHANCED RELATIONSHIP TO THE ROCK

The Rock is a key neighbour, but today is connected by service yards and highways to Mill Gate. By consolidating servicing strategy to the Mill Gate and relocating the carpark entrance to the current exit, this allows a new relationship to be formed where enhanced footfall and new routes can be created connecting two key town centre assets together.



11. Enhancing the PERMEABILITY across Angeloume way

Angouleme Way is a bypass style piece of highways infrastructure rather than one of placemaking and drawing people into the town. Creating enhanced connections across Angolume Way is a key design principal including new footpaths and reworked carparking entrance.



12. RE-PURPOSING the Mill Gate

A large area of demolition is planned as part of the redevelopment of the Mill Gate, this is indicated on the diagram as a red tone and illustrates the level of change proposed to help deliver the vision and design principals set out within these diagrams. The internal glazed mall is reduced from its current form recognising it has value as a unique all weather space. It is proposed to be reduced to a T form from its current circuit to enable wider streets to be connected with and new permeable public routes created whilst opening new views to existing Bury landmarks making the Mill Gate part of Burys unique townscape.

5.6 Development Areas

The Mill Gate presents an opportunity to deliver a **mixed-use hub** in the heart of Bury Town Centre. A number of key development areas have been identified within the Mill Gate Framework area, which are based on land use, activities and characteristics. It is not intended that each development area is considered in isolation. All development areas should seek to positively contribute to a collective, distinctive identity for the Mill Gate and Bury Town Centre, reinforcing the town centre as an integrated, connected, mixed use hub.



Development Zones

Within the Mill Gate SRF Area, 5 distinct character zones are to be encouraged – emerging from distinct combinations of density, massing, street characters and public realm proposals to create a sense of identity and legibility while providing a practical framework for implementing the 'vision'.

Market / Civic / Independent

- To the south of the Framework Area, has the potential to enhance the environment around the outdoor and indoor markets and the Interchange through reconfiguration of spaces and routes. To promote a sense of arrival in this gateway location.
- Opportunity to provide a community hub, linking in with the Flexi-Hall offer and to deliver affordable flexible workspace.
- Seeking to create a front door location for public services and civic functions within the town centre.
- Opportunity, where appropriate, to provide residential accommodation at upper levels, with ground floor social and community uses.





Precedents

CONTEXT PRECEDENTS PAGE 33

BURY MARKET

MATERIALITY //
Metal / Curtain Walling

ROOFSCAPE //
Single Pitched / 'Bird - Wing'

ARCHITECTURAL STYLE //
Open Air / Arcade / Brutalist

KAY GARDENS

MATERIALITY //
Sandstone / Limestone / Brick (historic)

ROOFSCAPE //
Flat / Single Pitched / Punctuating Chimneys

ARCHITECTURAL STYLE //
Mixture of late Victorian / Nineteenth Century / Ornamented / Contemporary















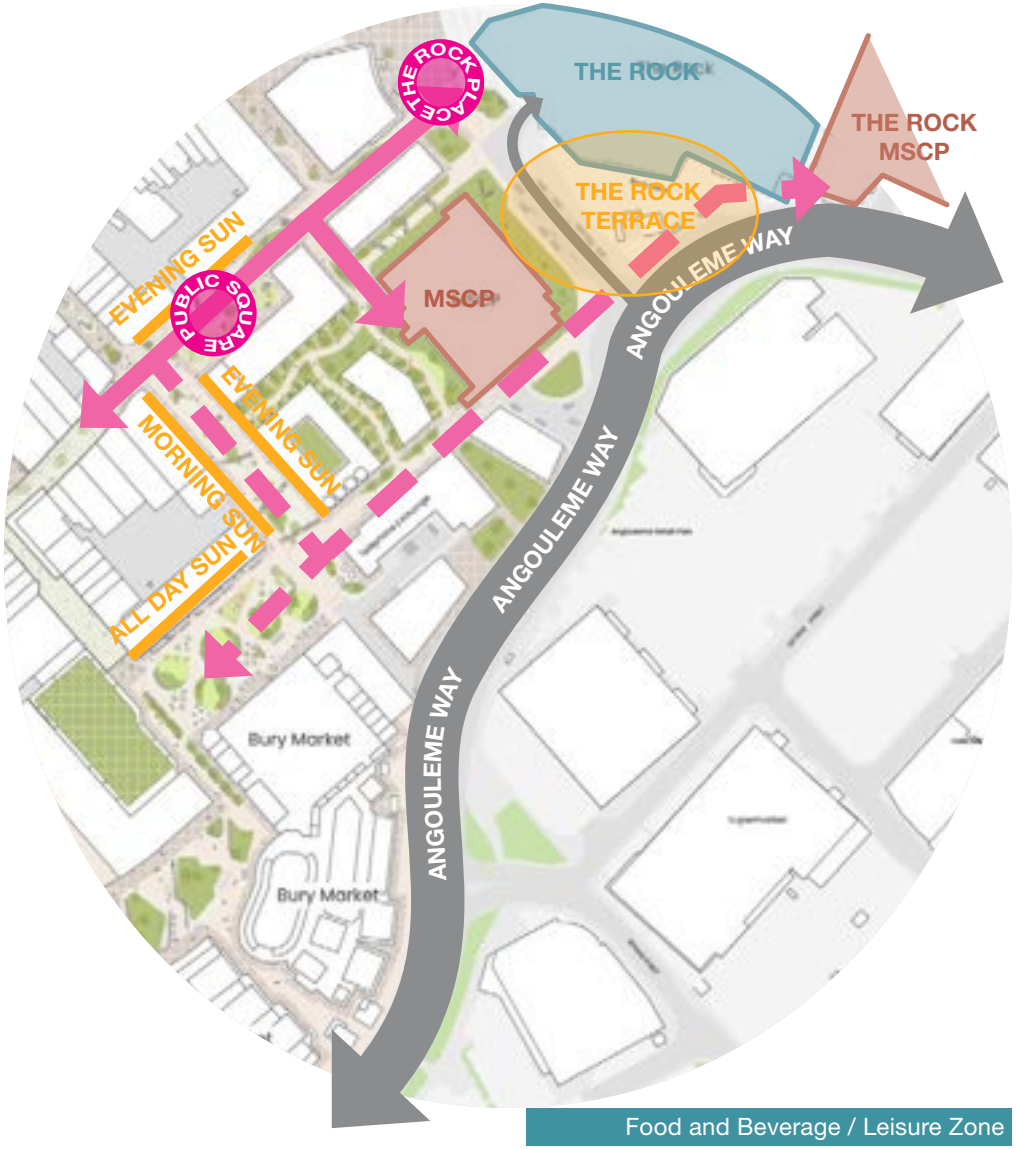




Food and Beverage / Leisure

- To the north-east of the Framework Area, has the potential to deliver a mix of leisure and food and beverage uses whilst benefiting from a number of existing cultural assets across the site, such as the MET Theatre.





Precedents

CONTEXT PRECEDENTS PAGE 33

THE ROCK HIGH STREET

MATERIALITY //
Sandstone / brick (modern + historic)

ROOFSCAPE //
Ridged / Multi-Gable / Hip / Half Hip

ARCHITECTURAL STYLE //
Contemporary / Victorian / Edwardian / Art Deco / Tudor

THE ROCK

MATERIALITY //
Brick / Metal / Timber / Curtain Walling

ROOFSCAPE //
Flat

ARCHITECTURAL STYLE //
Contemporary



















Retail

- At the centre of the Framework Area, supporting the Framework's ambitions to consolidate and diversify the Mill Gate's current retail offer.
- This central zone is a transitional zone between the proposed market / civic and leisure / food and beverage zones to the west and the residential zone to the east.
- Includes the opportunity to consolidate the internal shopping mall, by removing the mall roof along Union Street and TJ Hughes, whilst retaining the mall roof along The Mall and Haymarket Street to maintain an area of weather-proofed, sheltered within the Mill Gate.
- Opportunities to reuse existing under-utilised upper floors.





Precedents

CONTEXT PRECEDENTS PAGE 33

BURY MARKET

MATERIALITY //
Metal / Curtain Walling

ROOFSCAPE //
Single Pitched / 'Bird - Wing'

ARCHITECTURAL STYLE //
Open Air / Arcade / Brutalist

CIVIC QUARTER

MATERIALITY //
Sandstone + brick (modern + historic)

ROOFSCAPE //
Ridged / Multi-Gable / Hip

ARCHITECTURAL STYLE //
Mixture of late Victorian / Nineteenth Century / Ornamented

THE ROCK HIGH STREET

MATERIALITY //
Sandstone / brick (modern + historic)

ROOFSCAPE //
Ridged / Multi-Gable / Hip / Half Hip

ARCHITECTURAL STYLE //
Contemporary / Victorian / Edwardian / Art Deco / Tudor



















Residential

- The east of the Framework Area, has the potential to deliver residential development with ground floor commercial, as appropriate (such as convenience retail, social infrastructure).
- Opportunities for higher density residential development to the west. Higher density development is considered appropriate, creating a transition to the established medium density at The Rock development to the east.





Precedents

CONTEXT PRECEDENTS PAGE 33

THE ROCK HIGH STREET

MATERIALITY //
Sandstone / brick (modern + historic)

ROOFSCAPE //
Ridged / Multi-Gable / Hip / Half Hip

ARCHITECTURAL STYLE //
Contemporary / Victorian / Edwardian / Art Deco / Tudor

THE ROCK

MATERIALITY //
Brick / Metal / Timber / Curtain Walling

ROOFSCAPE //
Flat

ARCHITECTURAL STYLE //
Contemporary












Community Spine

Elements of Bury Town Centre have long been disconnected because of the existing Mall. The community spine looks to create a new energy and optimism in the area by allowing both existing and future communities of visitors and residents to mix through the use of public open spaces, food and beverage spaces, retail and other social opportunities established on the site.

The ground floor of many buildings in this neighbourhood will offer flexible future units to provide important active frontages to the area. All of this area will not be filled in with non-residential land uses so consideration will be given to appropriate locations for ground level residential units with non-residential units potentially being clustered around corners and open spaces to create a small activity hubs.





Community Spine

CONTEXT PRECEDENTS PAGE 33

BURY MARKET

MATERIALITY //
Metal / Curtain Walling

ROOFSCAPE //
Single Pitched / 'Bird - Wing'

ARCHITECTURAL STYLE //
Open Air / Arcade / Brutalist

THE ROCK HIGH STREET

MATERIALITY //
Sandstone / brick (modern + historic)

ROOFSCAPE //
Ridged / Multi-Gable / Hip / Half Hip

ARCHITECTURAL STYLE //
Contemporary / Victorian / Edwardian / Art Deco / Tudor

THE ROCK

MATERIALITY //
Brick / Metal / Timber / Curtain Walling

ROOFSCAPE //
Flat

ARCHITECTURAL STYLE //
Contemporary







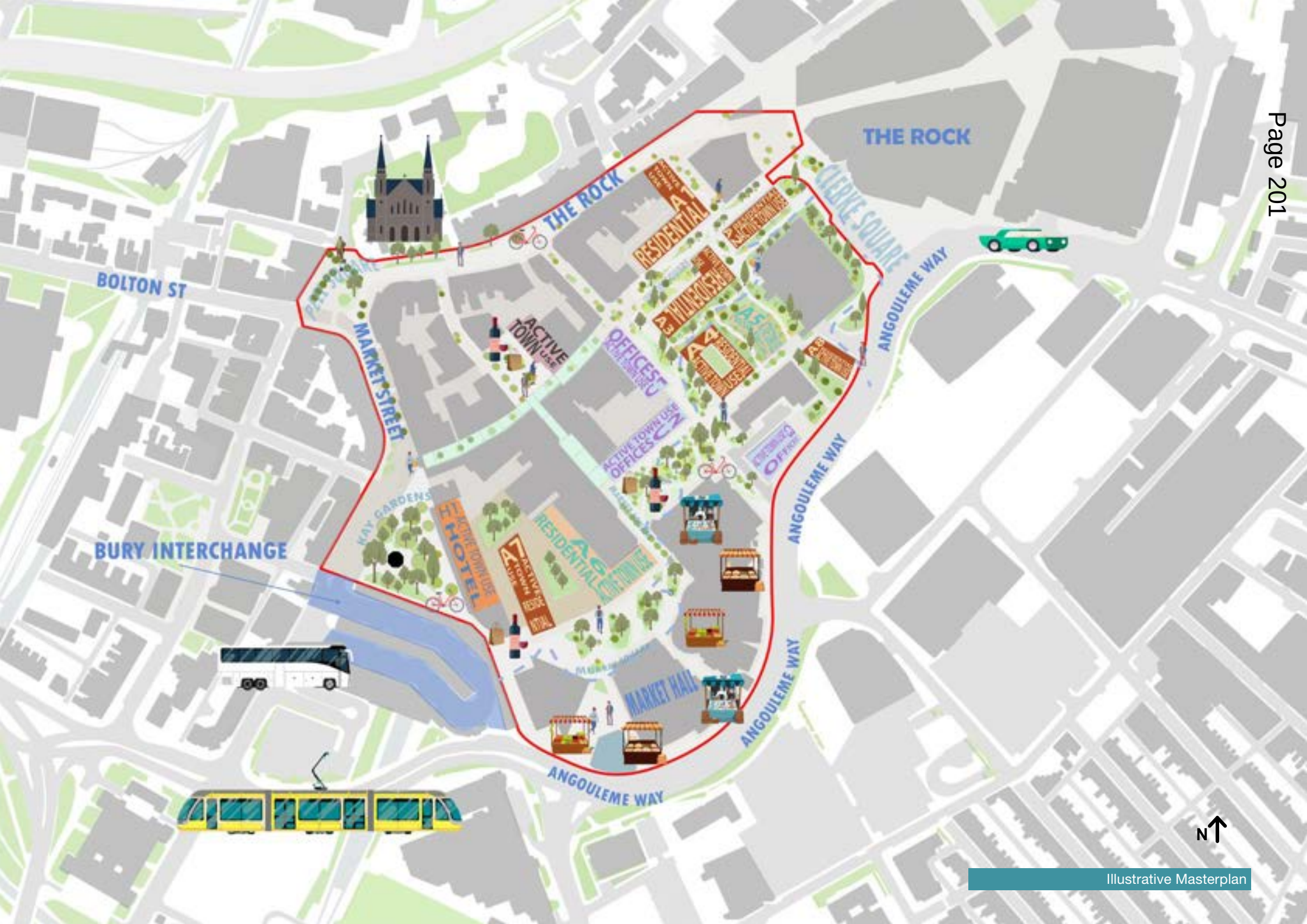












Illustrative Masterplan

5.7 Indicative Land Uses

A Diverse Mix

Mill Gate will be predominantly residential led, the area will accommodate a mix of commercial, civic and residential uses, particularly along the Market and existing shopping centre frontage, to reflect the existing character of the area.

- Gf - Active Town Use Upper - Residential
- Residential
- GF - Active Town Use Upper - Work
- Work
- GF - Active Town Use Upper - Hotel
- Food & Beverage



Indicative Land Use Plan

5.8 Indicative Ground Floor Uses

Ground Floor Uses

The masterplan provides both residential and non-residential uses at ground floor to create an engaged and activated public realm around the Framework Area. The Flexible Future Zones are areas identified on the ground floor that would be suitable to a accommodate different uses classes in the future as the masterplan becomes more realised. For instance, the Community Spine is a great location to include cafes, community uses and independent traders in the future as it becomes more used.



1 - Ground floor active use below residential deck

- Active town centre use

- Residential

Illustrative Ground Floor Use Plan

5.9 Scale and Massing

To identify and complement the local 'Bury' character, pockets of massing have been articulated to help inform the creation of a language to be used in The Framework. While the scale and massing of new development will depend upon the proposed end use a combination of bold and subtle responses to both the surrounding architectural character and town centre urban form will enhance and reinforce the changes in character across the site.

The massing across the site has been designed to transition with the existing civic context to the west, the more recent development of The Rock to the east and the emerging context to the south that will come forward as part of the wider town centre regeneration. This defines three distinct areas, the boundary facing the active frontages of The Rock development, the 'Middle of Mill Gate' and the area to the west that transitions to the existing historical fabric of Market Place / Market Street and the neighbouring town centre conservation area.

- 4-6 Stories
- 6-7 Stories
- 7-10 Stories

L Opportunity for tall building



Indicative Scale & Massing Strategy


C1
C2
C3

5.10 Active Frontages and Interface Distances

Active Frontages

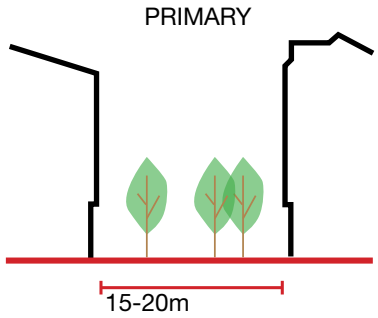
Active frontages, offering a range of local amenities, can be provided in the Mill Gate Framework along the Community Spine, as part of a linking retail and service hub, and adjacent to the re-purposed Mill Gate facades, to activate key routes and connections to neighbouring areas. In other locations, residential active frontages will be required to ensure that quieter streets have activation and surveillance. The newly pedestrianised routes of Minden Parade, S Back Rock Street and routes surrounding the perimeter of the existing mutl-storey are examples of where ground floor active frontages can add to the success of the Mill Gate, providing vibrancy throughout the day and evening.

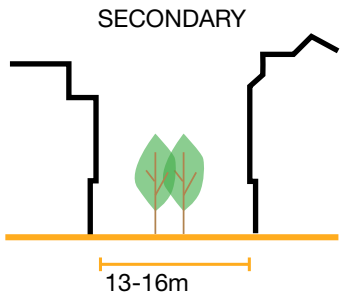


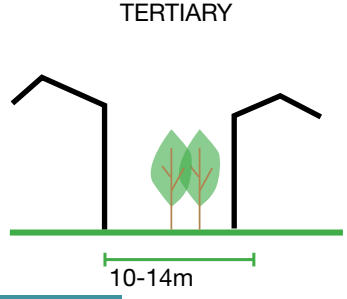
- Existing Active Frontage
- Proposed / enhanced Active Frontage
- Active Residential Frontage

Indicative Active Frontages Floor Plan

Interface Distances.









Indicative Street Interface Distances Plan

5.11 Servicing

Commercial Servicing + Access

Due to the layout of the retained shopping centre and the well-established habits of retailers the development seeks to retain and consolidate the existing service areas. The landscape, external areas and routes which link the service yards to the wider road network have been designed to provide suitable access for servicing, refuse and emergency vehicles. All servicing for the Framework Area is off road and contained with the site.

In addition to the modification of the existing service yards a new service loop road through the east of The Framework Area will pass through key neighbourhoods from Rochdale Road to Angouleme Way, allowing for greater permeability and continuous, easy access to existing and proposed commercial units.

Deliveries will be front and rear accessible and managed during agreed times with the Mill Gate management team. The servicing will be generally time limited to cause minimum conflict with the proposed residential zone.

1 - Consolidated market delivery yard

- Service Vehicle Movement

- Service Yards



Illustrative Servicing Strategy



Landscaping & Public Realm.

6

6.1 Importance of Landscape & Public Realm

Importance of Landscape & Public Realm.

THE IMPORTANCE OF LANDSCAPE

Integral to the sustainable future of Bury Town Centre is the creation of welcoming and functional public realm that supports the objectives of the Mill Gate Strategic Regeneration Framework (SRF).
In order for Bury to become an aspirational place where people choose to live, work and play, its outdoor environment should:

- Be inspirational and of the place.
- Practically and aesthetically support existing and proposed businesses.
- Include a network of streets and spaces that are easy to navigate.
- Offer a varied selection of linked spaces, each of which has a defined purpose.
- Relate to its context, be greener, both in the interest of visual amenity and biodiversity.
- Offer opportunity for people to engage with nature.
- Provide infrastructure to promote community health and well being.

PUBLIC REALM OBJECTIVES

Improvements to public realm through the SRF seek to:

- Stitch together existing and new built form to make the Mill Gate Shopping Centre well connected by high quality public realm.
- Create places that people want to visit as part of a day out to Bury.
- Make green, residential streets in which to live and play.
- Make a place that's easy to navigate.
- Put pedestrians first.
- Establish contemporary streets as a setting for business and leisure.
- Increase biodiversity through new green and blue infrastructure.
- Create flexible spaces to support the changing dynamics of the indoor and outdoor market.
- Make green, residential streets in which to live and play.
- Support multi modal travel by creating a welcoming arrival for those on foot or using public transport.
- Subtly integrate service routes into the street scene.





6.2 Illustrative Landscape Masterplan

ILLUSTRATIVE LANDSCAPE MASTERPLAN

GENERAL INFORMATION

- **SRF CORE AREA – 10.9ha**
- **MILL GATE ESTATE BOUNDARY**
- **SRF BURY COUNCIL / BRUNTWOOD JV BOUNDARY**

HARDWORKS

- S1.0 **PAVING TYPE A** *PEDESTRIAN PAVING 1*
- S2.0 **PAVING TYPE B** *PEDESTRIAN PAVING 2*
- S3.0 **PAVING TYPE C** *VEHICULAR BUILD UP PAVING*
- S4.0 **PAVING TYPE D** *GREEN GAP PAVING*
- S5.0 **PAVING TYPE E** *CROSSING POINT 'DECK'*
- S6.0 **MACADAM** *TO VEHICULAR AREAS* *TO ENGINEER'S DETAIL & SPECIFICATION*
- S6.1 **MACADAM** *TO PEDESTRIAN AREAS* *TO ENGINEER'S DETAIL & SPECIFICATION*
- **RAISED TABLE** *TRANSITION MARKER*

SOFTWORKS

- **PROPOSED TREE PLANTING**
- **PROPOSED SHRUBS & GRASSES**
- **LAWN**



Illustrative Landscape Plan

6.3 Street Hierarchy

STREET HIERARCHY

To make the future street network operate efficiently, a hierarchy is applied to the Landscape Masterplan. This responds to the way streets are used, informed by the adjoining use, neighbouring building scale, servicing strategy and emergency vehicle access.



Indicative Street Hierarchy Plan

6.4 Connected Public Realm

A NETWORK OF CONNECTED PUBLIC REALM

Alongside rationalised streets, a series of new spaces will enhance the living landscape and unlock connectivity and permeability for visitors thus making Bury a more welcoming a stimulating place to live, work and visit.

Anchored on the concept of a green spine, new public realm stitches together the interface between existing and proposed built form, strategically connecting the Mill Gate with the transport interchange and The Rock. This re-imagining of the town centre will see the creation of new public spaces, as illustrated on the next page.



- Spaces
- Influencing factor
- Built form & External Space Interface
- Green route

Illustrative Connected Realm Plan

6.5 Key Public Realm Spaces

KEY PUBLIC REALM SPACES

Each of these new and enhanced spaces has an important role to play in creating a network of connected public realm.



06) Market Place

A gateway into Bury from the north west, set within the conservation area.

04) Mill Gate NORTH

A pocket of green as a gateway to The Mill Gate, in proximity to the conservation area. Activated by new facades to the shopping centre

07) KAY GARDENS

Long established civic gardens with an important interface with the transport interchange and the Mill Gate Shopping Centre. Contemporary refresh to the arrangement and soft landscape style.

05) THE ROCK

A transitional space that links the proposed green spine to shopping streets of The Rock.

03) Mill Gate EAST

The confluence of key pedestrian links from the retail areas of The Mill Gate and The Rock, overlooked by residential neighbours. To include play area set amongst soft landscape.

02) CENTRAL MARKET PLACE

A new central green space embraced by a new market facade, commercial and retail development. Plenty of opportunity to relax and socialise within a green setting. Outdoor market to spill outdoors.

01) INTERCHANGE

The first impression when arriving by public transport, a flexible setting for the market and new Flexi Hall.



Delivery + Phasing.

7

7.1 Introduction



The principles within this Framework establish a versatile approach which aims to establish the basis upon which economically, environmentally and socially sustainable development can be delivered to meet the range of needs for a growing Bury town centre. The guiding principles of this framework also provide flexibility for the masterplan to evolve and adjust to changes in demand, design and technology over time.

The Framework details a long-term ambition for Bury Town Centre, and the Illustrative Masterplan presents an indication of what the regenerated town centre could look like. Given the scale of the Framework Area, the phases are anticipated to be delivered over a 10-15 year period. The final detailed design, configuration and phasing of the masterplan will therefore be influenced by a range of variables, which may include changing demands for each of the proposed uses, coordination with neighbouring landowners and the Council's strategic objectives and policies.

DELIVERY CONSIDERATIONS //

- **Occupiers:** The Framework Area is home to one of Bury's most prized assets, the nationally renowned Bury Market. Therefore, it will be essential that the Market, its operators, and its visitors, are carefully considered during the future sequencing of schemes and phases, to ensure that any development impacts can be minimised so far as possible. It is also vital that any future development minimises disruption to the retail function of the area.

- **Highways:** The Framework presents the opportunity to consolidate land uses across the Framework Area, including a range of positive interventions on the local highway network, which seek to improve the quality of streetscape, public realm, improve air quality and provide a more cohesive and integrated town centre. The highway interventions illustrated within this masterplan have been subject to technical analysis and are therefore considered achievable at the current time. However, when detailed plans emerge for future phases, further technical analysis and costing will be required to support finals plans.

- **Service Routes:** Changes to the servicing arrangements are identified as an important step to improve the way in which the market, retail and wider framework area functions. It is critical that continued delivery and servicing access for the Market and Mill Gate retailers is maintained during the delivery of future phases and a Service Management Strategy will be developed, in consultation with occupiers, as part of future detailed proposals.

- **Public Realm:** Whilst the majority of the Framework Area is under a single ownership, there are sections of public realm which fall outside Mill Gate's ownership. Therefore, it will be crucial that the first phase of development is supported by a clear Public Realm Strategy, which will be prepared in consultation with any third party land owners.

- **Relocation of Retailers:** Where it is necessary to relocate existing businesses to enable the delivery of a development phase, affected occupiers will be consulted early on and provided with support to find a new premises.

- **Securing Planning Permissions:** Each phase of the masterplan will need to be designed in detail and subject to further statutory and public consultation prior to submission of a planning application. As part of the planning process, all future planning applications within the masterplan redline boundary will be required to demonstrate how they have addressed the key components of the Framework.

- **Changes in Demand:** In order to ensure the successful delivery of the Masterplan, there is a need to maximise the beneficial outcomes from investment and drive the continued economic growth in the town centre. The indicative phasing strategy seeks to generate initial placemaking benefits including improved connectivity between the Mill Gate and Rock and the creation of a residential community, whilst later phases seek to integrate with Bury Council's long-term ambitions for the Interchange. However, changes in demand which may influence the most appropriate first phase of development and this will need to be kept under review.

- **Funding:** Due to the scale and complexity of the regeneration opportunity, it may be necessary to secure public funding to support overall viability of future phases and maximise wider socio-economic benefits.

- **Changes in Demand:** In order to ensure the successful delivery of the Masterplan, there is a need to maximise the beneficial outcomes from investment and drive the continued economic growth in the town centre. The indicative phasing strategy seeks to generate initial placemaking benefits including improved connectivity between the Mill Gate and The Rock and the creation of a residential community, whilst later phases seek to integrate with Bury Council's long-term ambitions for the Interchange. However, changes in demand which may influence the most appropriate first phase of development and this will need to be kept under review.

- **Funding:** Due to the scale and complexity of the regeneration opportunity, it may be necessary to secure public funding to support overall viability of future phases and maximise wider socio-economic benefits.

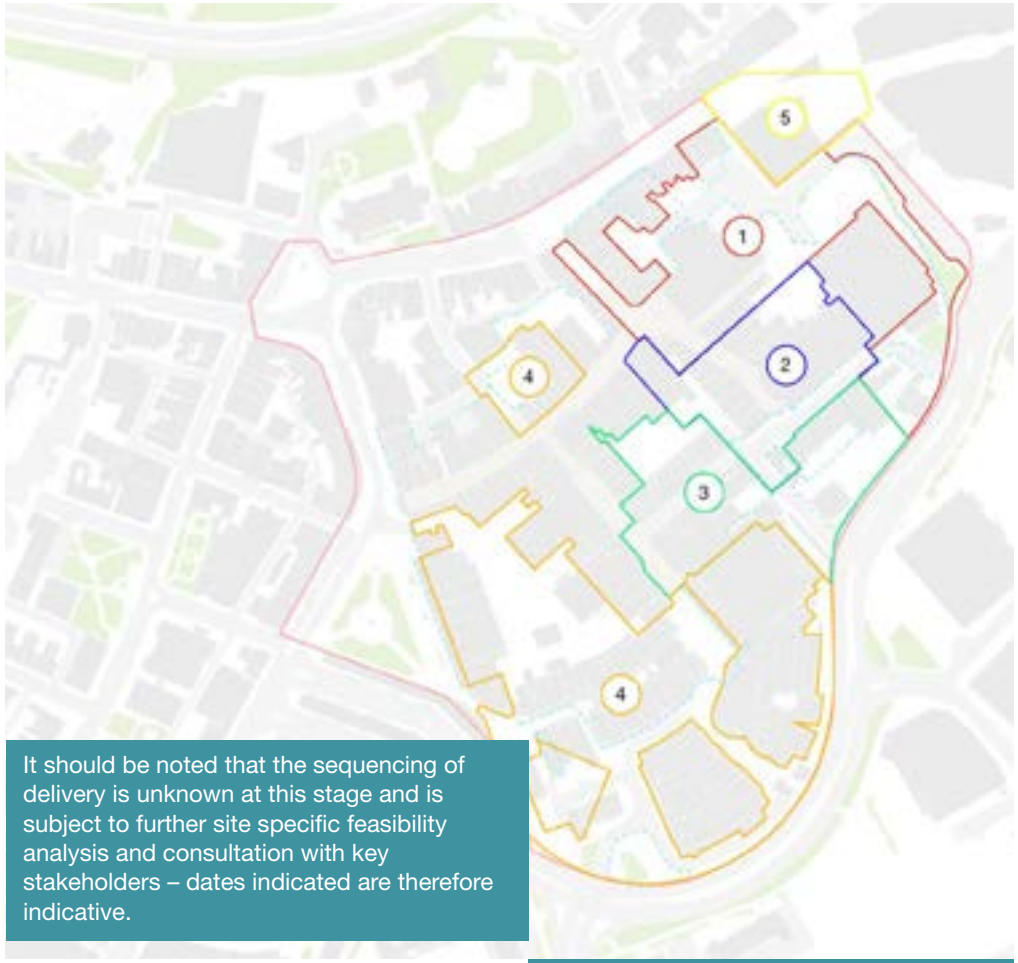
Temporary Arrangements

During the construction of each phase, temporary arrangements will be put in place to minimise disruption to the highway network and retained occupiers.

Market Operations

In committing to the delivery of the regeneration programme, the JV recognises the need to maintain the market's existing operations and minimise any potential impacts. Future proposals will recognise the importance of continuing to support the continued operations of the market – details of this will form part of future detailed planning applications.

The following provides an indication of how the masterplan could be delivered across multiple phases. Before the masterplan sequence can be established, there will be a need for further detailed technical and commercial analysis, as well as additional stakeholder engagement.



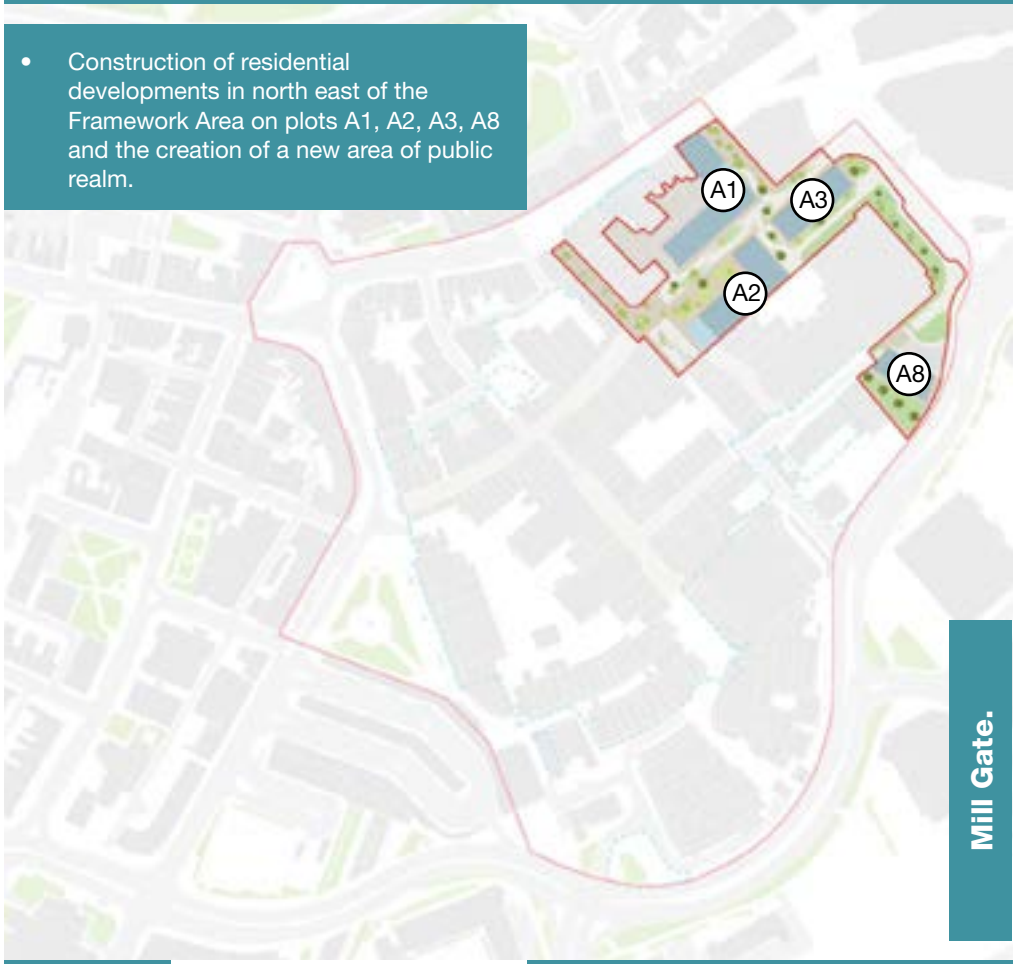
Mill Gate.

It should be noted that the sequencing of delivery is unknown at this stage and is subject to further site specific feasibility analysis and consultation with key stakeholders – dates indicated are therefore indicative.

Indicative Phasing Boundaries Plan

PHASE 1 - 'Residential Quarter': 2024 - 2028

- Construction of residential developments in north east of the Framework Area on plots A1, A2, A3, A8 and the creation of a new area of public realm.



Mill Gate.

Indicative Phase 1 Plan

PHASE 2 - 'Retail Quarter': 2025 - 2029

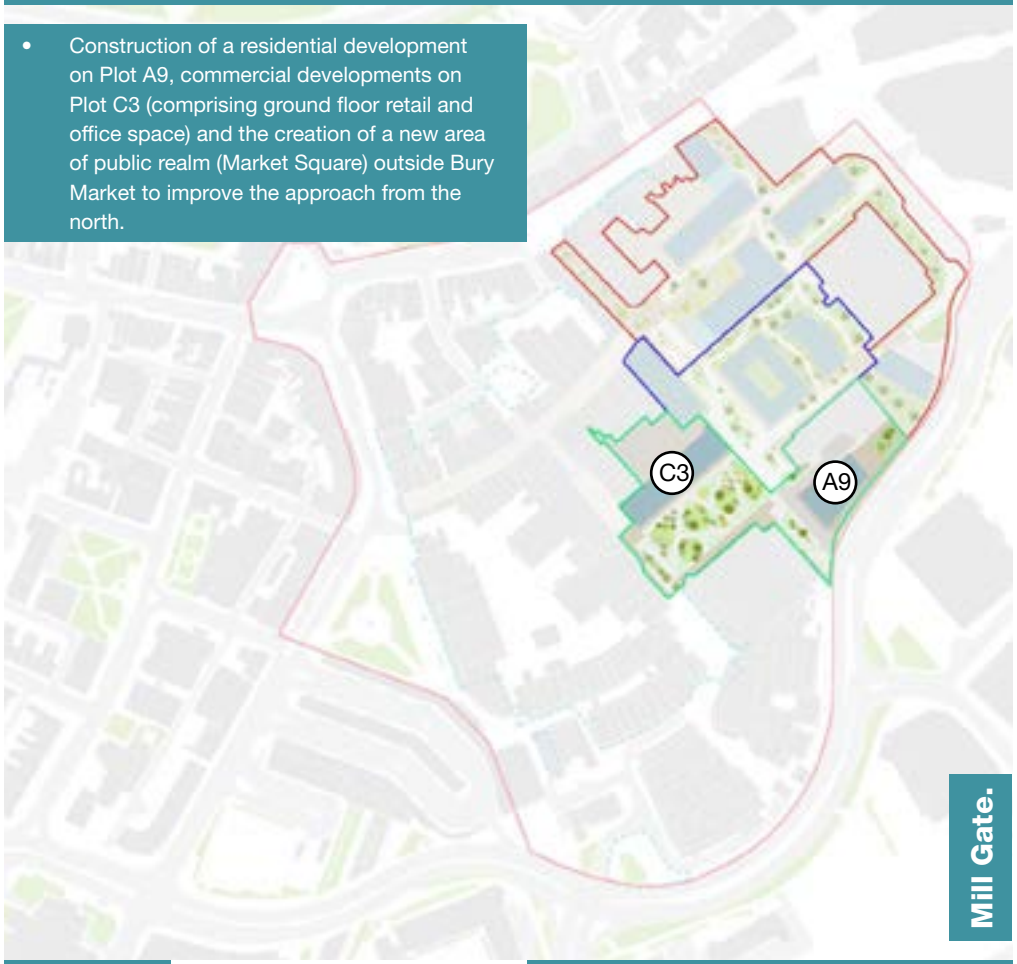


- Construction of residential developments on plots A4 and A5, in addition to a commercial development (comprising ground floor retail and office space) on Plot C1.
- Creation of new areas of public realm (Union Square) between Plots C1, A3, A4 and A5 in the central section of the Framework Area;

Indicative Phase 2 Plan

PHASE 3 - 'Residential Quarter': 2026 - 2031

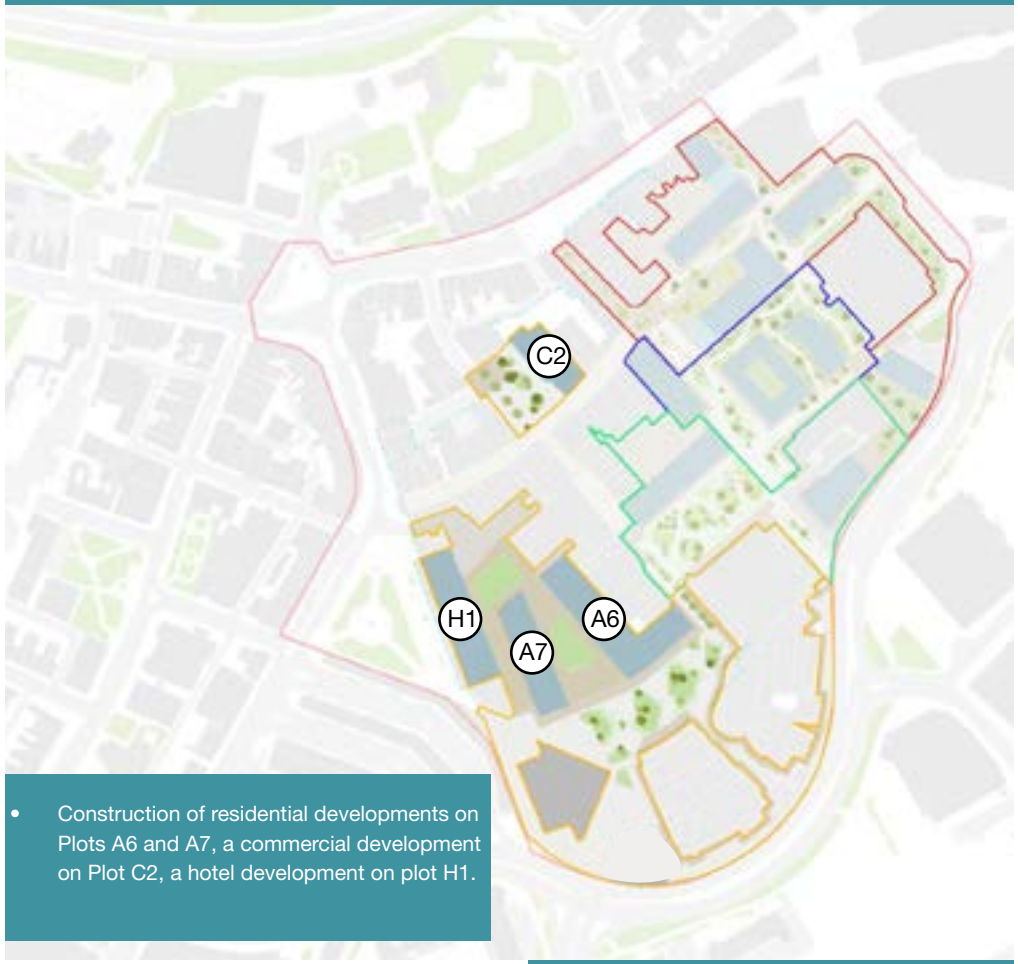
- Construction of a residential development on Plot A9, commercial developments on Plot C3 (comprising ground floor retail and office space) and the creation of a new area of public realm (Market Square) outside Bury Market to improve the approach from the north.



Mill Gate.

Indicative Phase 3 Plan

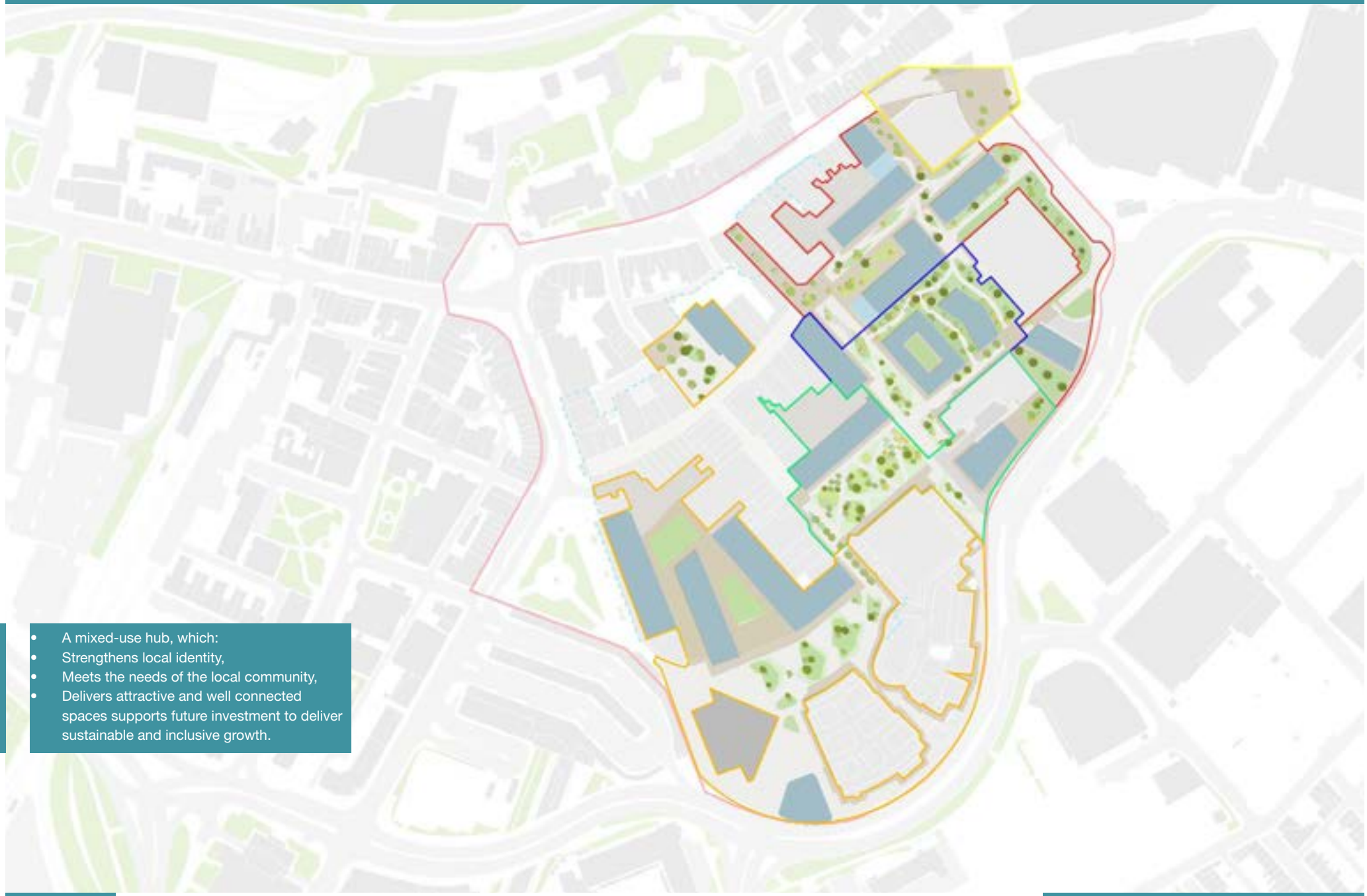
PHASE 4 'Leisure Quarter': 2028 - 2033



- Construction of residential developments on Plots A6 and A7, a commercial development on Plot C2, a hotel development on plot H1.

Indicative Phase 4 Plan

COMPLETE



Mill Gate.

- A mixed-use hub, which:
- Strengthens local identity,
- Meets the needs of the local community,
- Delivers attractive and well connected spaces supports future investment to deliver sustainable and inclusive growth.

7.2 Planning Obligations

The provision of key infrastructure should be considered as part of future planning applications in order to support the amount of development proposed and the success of the regeneration project. As such, it should also be considered in relation to mitigating or offsetting any identified and otherwise unacceptable additional pressure on existing social, physical and economic infrastructure. In accordance with national planning policy, this key infrastructure will be secured via the planning process through planning conditions, and where that is not possible, through the use of planning obligations.

The negotiation of planning conditions and planning obligations will be an integral part of the process for determining planning applications at Mill Gate. Planning obligations will be sought where they meet all of the following tests: a) necessary to make the development acceptable in planning terms; b) directly related to the development; and c) fairly and reasonably related in scale and kind to the development.

With regard to the saved policies of Bury's adopted Development Plan, Policy RT2/2 Recreation Provision in New Housing Development and Policy H4/1 Affordable Housing of Bury's UDP (1997) and Bury planning guidance documents SPD1 (Open Space, Sport and Recreation Provision) are relevant. Along with SPG5 (DC Policy Guidance Note 5: Affordable Housing), they outline the potential use of planning obligations relating to affordable housing provision and recreation provision.

With regard to the regeneration of Mill Gate, Policy H4/1 and SPG5 should be addressed and it is anticipated that affordable housing provision will be secured through a Section 106 Agreement. To support the ultimately delivery of the project and its ambitious regeneration outcomes, viability appraisals will be prepared to identify the levels of infrastructure contributions that the project can sustain, without impairing its viability. Viability appraisals issued in support of planning proposals will be prepared in accordance with national policy and guidance.

Greater Manchester's Places for Everyone Plan (Main Modifications Draft) reiterates the importance of infrastructure implementation, with Policy JP-D 1 (Infrastructure Implementation) outlining that the Combined Authority will establish a long-term funding mechanism to support transport and site specific infrastructure and ensure the timely delivery and capture of developer contributions. It also highlights the importance of early dialogue between developers and infrastructure providers to identify the infrastructure needs arising from new development, and ensuring that these are addressed through building design, utility networks and connections in time to serve developments. Policy JP-D 2 (Developer Contributions) also outlines the requirement for developers to provide or contribute towards, the provision of mitigation measures to make the development in planning terms, via the most appropriate mechanism e.g. planning conditions, Section 106 planning obligations, agreements made under Section 278 of the Highways Act 1990 (as amended).

Due to the phased approach across the Framework Area, there will be forward consideration for what infrastructure improvements and any other planning obligations should be made during the initial phases in order to support the delivery of later phases.



Not So Secret Garden - Altrincham



Appendices.

8

8.1 Appendix 01: Planning Policy and Guidance



National Context

NATIONAL PLANNING POLICY FRAMEWORK 2023) //

The National Planning Policy Framework (NPPF) was first published in March 2012 and updated in 2018, 2019, 2021 and most recently in September 2023. The NPPF is a material consideration in the determination of planning applications and underpins the government's planning policies for England, and how these should be applied.. NPPF paragraph 11 introduces the "Presumption in favour of sustainable development" and supports proposals that are in accordance with an up-to-date Development Plan. Sustainable development can be understood as positive growth which supports economic, environmental and social progress for existing and future generations.

NATIONAL PLANNING PRACTICE GUIDANCE //

The National Planning Policy Guidance ('NPPG') was first published in November 2016 and last updated in June 2021. It sets out advice, information and best practice on a wide range of planning issues with the overall objective of becoming a single source for planning guidance which is maintained as a live resource.
The NPPG stresses the importance of well-designed places and good design that takes the opportunity to improve the character and quality of an area and the way it functions.

NATIONAL DESIGN GUIDE //

The National Design Guide was published by the Ministry of Housing, Communities and Local Government in 2019 (and last updated in January 2021). This document forms part of the governments planning practice guidance and was created to outline key characteristics that make well-designed places.

THE ENVIRONMENT ACT (2021) //

The Environment Act received Royal Ascent in 2021, and aims to improve air and water quality, protect wildlife, increase recycling and reduce plastic waste. Most pertinently to Planning, the Act enshrines the obligation for developers to ensure that all new proposals feature at least a 10% improvement to biodiversity; grants of planning permission are to be accompanied by a condition stipulating biodiversity gain is to be managed for at least 30 years to ensure that all created and improved habitats stay health and flourishing for decades to come.

Regional Context

THE GREATER MANCHESTER STRATEGY (2021 - 2031) //

The Greater Manchester Strategy (GMS) is Greater Manchester's overarching strategy which has set the framework for policy development across Greater Manchester since 2009. It was updated in 2021 for the period until 2031, and is the fourth iteration of the strategy. It builds on the substantial progress made since the first Greater Manchester Strategy was published in 2009.

The Strategy sets out a route, over the next decade, to deliver a vision for the benefit of residents of Greater Manchester and its places. Overall, the Strategy puts economic prosperity, the climate and Levelling Up at the heart of Greater Manchester's priorities.

The Strategy outlines the following industries which are critical to creating a fairer, more sustainable Greater Manchester, these are:

- **Health Innovation** – building on the success of the life sciences cluster in Greater Manchester to improve the health and wellbeing of residents of Greater Manchester;
- **Advanced Materials and Manufacturing** - expanding the City Region's successful Graphene research and industry;
- **Digital, Creative and Media** - build on the significant clusters in cyber security, broadcasting, culture, content creation and media;
- **Clean Growth** – continue working toward Greater Manchester's Clean Growth Mission.

The GMS Strategy is also the blueprint for the future of public services in the City region, setting out how public bodies – including the ten councils and the Mayor, the NHS, transport, police and the fire service – will collaborate with local people to take charge of the future. It addresses education and skills, health, wellbeing, environment, work and economic growth simultaneously in the belief that this is the best way to bring about change, and make a real difference to the lives of real people.

Regional Context

PLACES FOR EVERYONE JOINT DEVELOPMENT PLAN - PUBLICATION DRAFT (2021) //

The Places for Everyone Joint Development Plan (PfE) for Bolton, Bury, Manchester, Oldham, Rochdale, Salford, Tameside, Trafford, and Wigan sets out the region's plan for homes, jobs and the environment for the city region. It will enable an informed, integrated approach is taken to strategic development planning across the region.

The purpose of the PfE Joint Development Plan is to enable Greater Manchester to manage land supply across the city region in the most effective way to achieve the vision set out in the Greater Manchester Strategy, based on a clear understanding of the role of places and the connections between them. Built on a robust analysis of projected employment growth, including a sectorial analysis of key growth sectors, and an assessment of demographic change and housing requirements arising from such changes, the PfE Joint Development Plan will provide a clear prospective of land requirements, along with the critical infrastructure – transport, digital, energy, water and waste – required to support such development.

The Draft Plan outlines a target for 175,185 homes to be built within the 9 relevant Local Authorities of Greater Manchester between 2022-2039. Draft Policy JP-H4 outlines that new housing development should be delivered at a density appropriate to the location, reflecting the relative accessibility of the Site by walking, cycling and public transport, in accordance with the minimum densities set out in the Plan.

The PfE is covered by Draft Policy JP-Strat 6 (Northern Areas) which seeks to ensure a significant increase in the competitiveness of the northern part of the conurbation. A strong focus on prioritising the re-use of brownfield land through urban regeneration, enhancing the role of town centres, and increasing the range, mix, type and quality of homes. It also seeks to improve public transport and active travel.

The plan has been submitted together with all the supporting documents, background evidence, and representations received during the final stage of public consultation, which took place from 9 August to 3 October 2021. The Plan was submitted to the Secretary of State for Examination on 14 February 2022, with the Examination ongoing.

GREATER MANCHESTER TRANSPORT STRATEGY (2040) //

Greater Manchester's Transport Strategy 2040 sets out a vision for: "World class connections that support long-term, sustainable economic growth and access to opportunity for all" and seeks to address the four critical transport challenges of supporting sustainable economic growth, improving quality of life, protecting the environment and developing an innovative city region.

The strategy is organised by spatial themes and takes a long term view of transport requirements across Greater Manchester and the priority requirements to meet those needs and support the development of a 'world class' transport system with the City as it aims improve connectivity between the innovation district and surrounding neighbourhoods, as part of the 'connected, permeable and accessible' design principle. This will be achieved through a combination of opening up key connective key routes through the neighbourhood and creating a series of well-connected public spaces.

GREATER MANCHESTER'S WALKING + CYCLING INVESTMENT PLAN (BEE NETWORK) 2020 //

This plan is an update on the 'Made to Move' strategy (2018) and Bee Network launch (2019) and focuses on how the Bee Network, an 1,800 mile network of walking and cycling routes across Greater Manchester will be delivered.

The Bee Network will support the delivery of 'Our Network': Greater Manchester's plan for an integrated, simple and convenient London-style transport system. It will allow people to change easily between different modes of transport, with simple affordable ticketing and an aspiration to have London-style cap across all modes. This would include orbital routes that allow people to travel around the city-region, as well as in and out of the centres. These activities will all work to deliver the Greater Manchester Transport Strategy 2040 which sets out a vision for at least 50% of all journeys in Greater Manchester to be made by walking, cycling or public transport by 2040.

GREATER MANCHESTER WORK + SKILLS STRATEGY //

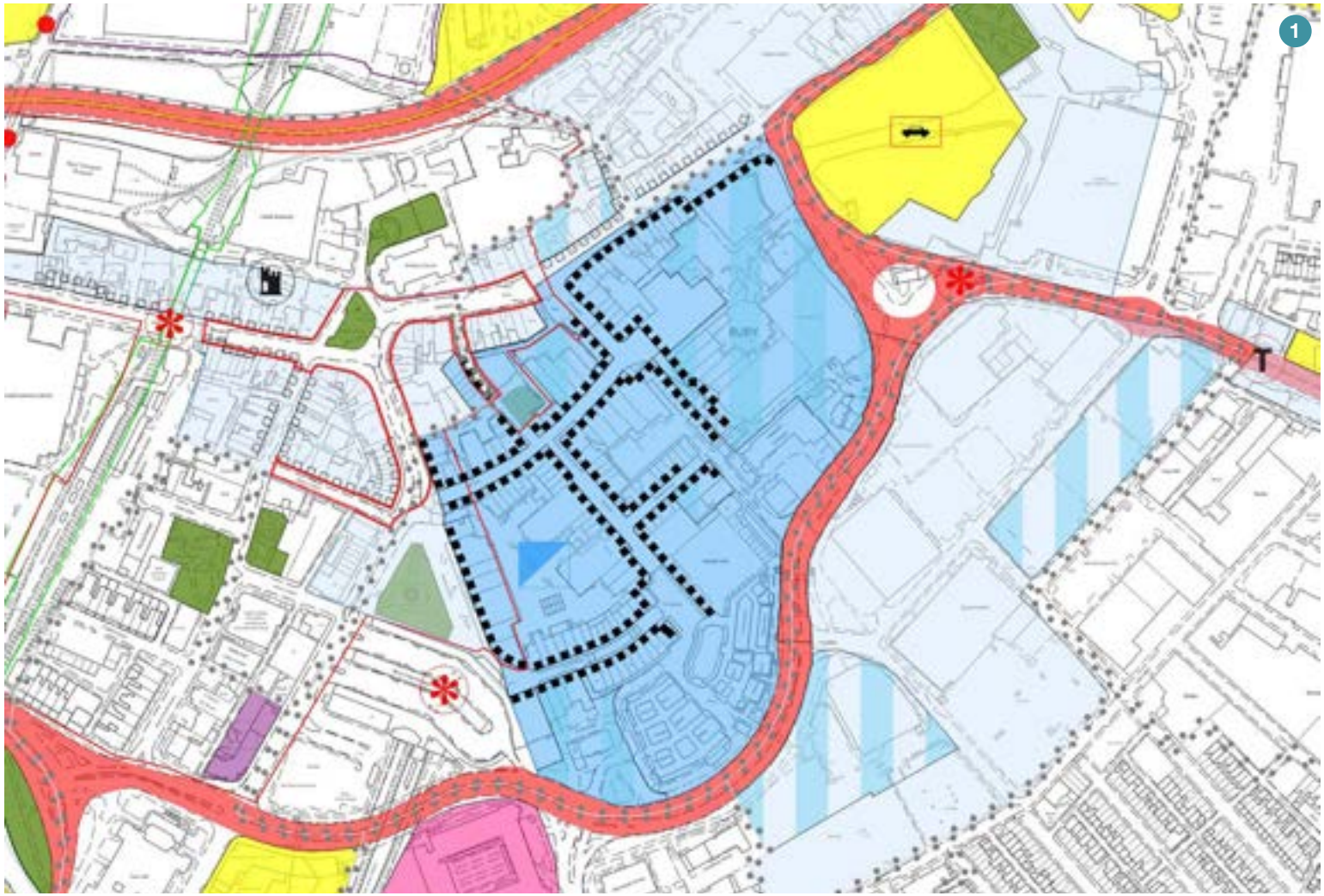
This Strategy sets out Greater Manchester's approach to delivering a work and skills system that meets the needs of Greater Manchester employers and residents. The Strategy aims to create an integrated employment and skills eco-system which has the individual and employer at its heart, and that better responds to the needs of residents and businesses and contributes to the growth and productivity of the Greater Manchester economy.

Local Context

ADOPTED UNITARY DEVELOPMENT PLAN (1997) //

The adopted Unitary Development Plan is Bury Metropolitan Borough Council's primary decision making document. It was adopted in August 1997, and is supported by a series of Supplementary Planning Documents and Supplementary Planning Guidance published between 2001 and 2021. The Unitary Development Plan is currently being reviewed as BMBC prepare their New Local Plan. The following UDP policies are of particular importance to the Framework:

Policy Ref	Overview	Requirement for Framework Area
S1/1: Shopping in Bury Town Centre **S2/2: Prime Shopping Areas** **S3/1: Shopping Development**	States that the Council will protect, maintain and enhance the role of Bury Town Centre as a sub-regional shopping centre and promote the centre as a focal point for further development. In particular, the Council will support the expansion of the centre through the development of additional comparison shopping floorspace, complementary non-food retail warehousing and speciality shopping.	Future proposals at the Mill Gate centre will be required to continue to provide a range of retail and shopping uses.
S3/4 Markets of the UDP	References that the Council will encourage and support proposals which seek to consolidate and enhance existing market facilities in Bury, Ramsbottom and Radcliffe Town Centres through environmental and physical improvements.	The Framework will consider its interface with Bury Market (and emerging Flexi Hall).
TC1/1 Open Space in Town Centres	Outlines within the Town Centres the Council will protect identified areas of open space which provide: • an essential element in civic design; • valuable visual amenity; • important outlets for recreation; • valuable wildlife habitats; or • function as buffers between incompatible uses or provide links between other open land areas.	This Framework promotes improvements to existing areas of open space and public realm, and the integration of these areas better to allow a seamless, vehicle free experience within large sections of the town centre.
TC1/2 Pedestrian/Vehicular Conflict in Town Centres	States that the Council will undertake appropriate schemes to reduce the conflict between pedestrians and vehicles in the Borough's Town Centres.	This Framework promotes the segregation of cars and pedestrians / cyclists, by downgrading roads exploring opportunities to reduce pedestrian / vehicular conflict in the Framework area.
TC2/2 Mixed Use Development	States the Borough's town centres will be encouraged to develop as the principal focal points for cultural, leisure, business, professional services, commercial and retailing activities. Development proposals which would have a detrimental effect on the vitality and viability of these centres will not be permitted.	In addition to the improved provision of retail, the Framework encourages the provision of cultural, leisure and professional services within the Framework Area.
Policy TC2/1 – Upper Floors	States that within the town centres, the Council will support proposals which bring underused and vacant space of upper floors of premises into beneficial use.	This Framework encourages future developers to consider the refurbishment and reuse of existing buildings, including upper floors.
Policy TC2/2 – Mixed Use Development	States the Council will encourage and support compatible mixed use development within the town centres.	The Framework encourages the provision of mixed-use development within the Mill Gate, including residential apartments of a mix of types and tenures.











1// Bury Unitary Development Plan Adopted Policies Map (1997)

2// The Fusilier Museum

3// The Rock - Retail High Street

4// Angouleme Way Retail Park

Local Planning Guidance

BURY FIRST HOMES + AFFORDABLE HOUSING POLICY POSITION (2021) //

First Homes was introduced by the Government in 2021, and is a directive to improve the provision of affordable housing in towns and cities. Bury adopted their Policy Position in 2021, and it outlines the key targets which BMBC will typically apply. These are:

- 25% of all homes on developments of 25 (or more) dwellings and 10% of homes on developments of 10-25 dwellings should be provided as affordable housing;
- 25% of new affordable housing should be provided as First Homes;
- First Homes must be sold with a minimum discount of 30% of the market value;
- First sale price of First Homes must be no higher than £250,000, sold to first-time buyers with a combined household income of no less than £80,000.

EMERGING BURY LOCAL PLAN (TBC) //

Bury Local Plan is currently under development by Bury Council, and will provide a framework for future growth and development within the Borough. The plan will outline the challenges that Bury is facing, including the need for ongoing regeneration within its town centres. The Bury Local Plan will seek to drive forward the creation of new jobs, ensuring that there is a supply of good quality, affordable housing whilst also balancing the requirement to fight climate change.

SUPPLEMENTARY PLANNING ADVICE

Bury has a number of supplementary planning advice documents. The following key supplementary planning advice documents are pertinent to the preparation of this Framework.

No.	SPG	Relevance to Framework
SPD 1	Open Space, Sport and Recreation Provision in New Housing Development (adopted 2015)	• Provides advice in relation to developer contribution towards the provision, enhancement and maintenance of open spaces in Bury. • Developers of new housing developments involving 10 or more dwellings are required to make off-site provision for new open space and recreation facilities by way of a one-off payment
SPG 3	Planning Out Crime (adopted 2001)	• Outlines measures which new development should utilise to reduce opportunities for crime and anti-social behaviour.
SPG 5	Affordable Housing in new residential developments	• Provides advice on the implementation of affordable housing provision in Bury. This includes setting out details of the types of affordable housing that may be required, and underlines the locational and procedural issues that will be taken into account when negotiating and implementing provision.
SPD 11	Parking Standards in Bury	• Sets out the minimum and maximum parking standards for different uses across Bury.
SPD 16	Design and Layout of New Development (adopted 2008)	• Outlines the need for sustainable development that is more environmentally responsible. It also highlights the need for community development that provides for a greater sense of involvement in the planning and development processes, and also the need for inclusive and safe developments for all residents.

1// Bury 2040 Transport Strategy
2// Bury Town Centre Masterplan

BURY 2030: LET'S DO IT! STRATEGY //

The vision aims to achieve a series of overarching objectives, including being a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation. The strategy also aims to achieve the following targets for its residents:



BURY TOWN CENTRE MASTERPLAN (2022) //

The Bury Town Centre Masterplan, approved in March 2022, outlines the strategy to facilitate transformative change for the town centre over the next 20 years, and buildings on the positive change that is already taking place in the town (including the redeveloped Interchange and recently approved Flexi Hall).

The Masterplan sets out proposals to transform the Mill Gate shopping centre, including new hops, leisure, residential and business opportunities. This Framework will build on the broad principles outlined in the Masterplan, and outline a framework for the regeneration of the Mill Gate and surrounding area.

BURY HOUSING STRATEGY 2021-2026 //

To support the Bury 2030 "Let's Do It!" strategy, Bury adopted their Housing Strategy in April 2021. The Housing Strategy is underpinned by five themes: Healthy People, Thriving Green Spaces, Co-designed Ideas, Future-proofed Infrastructure and Inclusive Growth. The targets for the Housing Strategy include:

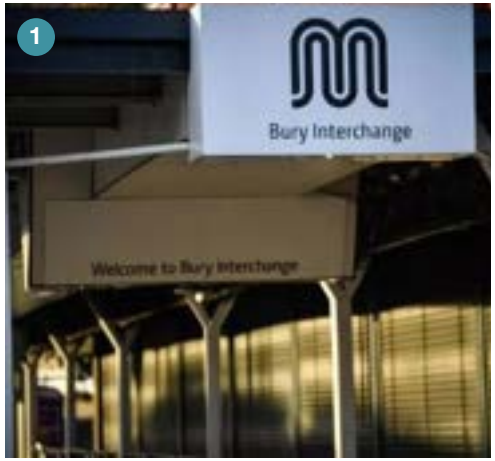
- More homes in the Borough;
- Increased affordability;
- A more dynamic housing market enabling access to suitable homes;
- Good quality, healthy homes;
- To eliminate rough sleeping by 2025; and
- Rapid movement toward low carbon housing.

BURY 2040 TRANSPORT STRATEGY (MARCH 2023) //

The Bury Local Transport Strategy outlines six strategic objectives to enable Bury to be well integrated into the Greater Manchester transport network, and to achieve the targets set out in the "Let's Do It!" strategy. These objectives are:

- **Objective 1** – Support sustainable economic growth and regeneration;
- **Objective 2** – Reduce carbon emissions;
- **Objective 3** – Encourage healthy and active lifestyles;
- **Objective 4** – Improve connectivity;
- **Objective 5** – Improve maintenance and management of the transport network;
- **Objective 6** – Improve road safety.

To achieve these objectives, Bury MBC and Transport for Greater Manchester are exploring a range solutions, including a new transport interchange in Bury, a Borough-wide active travel network, expanding the network of EV charging points and improved bus services throughout the Borough with the introduction of the Bee Network.





Sustainability and Climate Change

Greater Manchester Combined Authority's (GMCA) 5 year Environment Plan, launched in 2019, sets out the city regions strategy for progressing to carbon neutrality by 2038. The 5-year Environment Plan sets out ambitions for Greater Manchester to be clean, carbon neutral, climate resilient city region with a thriving natural environment and circular net zero waste economy.

In supporting Greater Manchester's ambitions, climate change is a golden thread throughout PfE, recognising that a combination of actions are encouraged to suitably address and adapt to climate change. This includes, setting out:

- Methods to de-carbonise the city region – Policy JS-S 2 Carbon and Energy
- The delivery of renewable and low carbon energy schemes – Policy JP-S 3 Heat and Energy Networks
- Measures to future proof the city region to mitigate environmental challenges – Policy JP-S 4 Resilience
- Water based measures to adapt and reduce the impacts of climate change - Policy JP-S 5 Flood Risk and the Water Environment
- Measures to help achieve a circular and zero-waste economy - Policy JP-S 7 Resource Efficiency

PfE sets out a number of carbon and energy targets and expectations for mew development to support the 2038 carbon neutrality ambitions, including:

- Be net zero carbon from 2028 by following the energy hierarchy.
- For non-residential developments, achieve at least BREEAM excellent standard (or equivalent)rising to 'BREEAM outstanding' (or equivalent) from 2028.
- All new dwellings should seek a minimum 19% carbon reduction against Part L of the 2013 Building Regulations (or until such time that this level is superseded by changes to national building regulations)

Bury Council declared a Climate Emergency in 2019, in response to the undeniable scientific evidence that the actions of humans are having a negative impact on the planet. In response, Bury Council produced their Climate Action Strategy (2021) and Action Plan (2023).

The Bury Climate Action Strategy (2021) provides information on climate change science, background, place-setting, details the key action areas and the thinking behind Bury's decisions. The Bury Climate Action Plan (2023) shows Bury's progress towards being carbon neutral by 2038 and where more work is required. The action plan is updated every year to account for new issues, ideas, and technology.

Carbon neutrality, for Bury, means reducing carbon emissions resulting from gas, electricity and vehicles used in the town. To achieve this, opportunities should be explored to:

- Source electricity from alternative and renewable energy, for example the installation of heat pumps and solar PV systems;

Maximise energy efficiency of buildings through insulation and energy-efficient lighting, heating and cooking facilities;

- Provide opportunities to move away from fuel-based transport, including the provision EV charging facilities, dedicated cycle routes, and reliable, cost-effective public transport;
- Encourage suppliers and real estate professionals to source materials and goods a more circular, sustainable and resource-efficient business models;
- Capture carbon naturally by increasing woodland cover and by protecting and enhancing soil environments and natural habitats;
- Prevent fuel poverty and encourage environmental justice by ensuring that all new properties, regardless of the end-user, is efficient and cost-effective to run;
- Ensuring new developments are adaptable to new technologies.

Bury's Climate Action March 2023 update shows that Bury as a borough is moving in the right direction with a lot of the metrics of success, including Carbon Emissions, Air Quality, Energy Consumption and electric vehicle ownership. To date, Bury as achieved a 63% reduction in greenhouse gas emissions (compared to 2008/2009 levels).

This reduction will continue to decline with the introduction of a number of measures:
- The employment of a Climate Action Officer, a Climate Action intern and a Move More Officer at Bury BMC to promote action across the Borough;

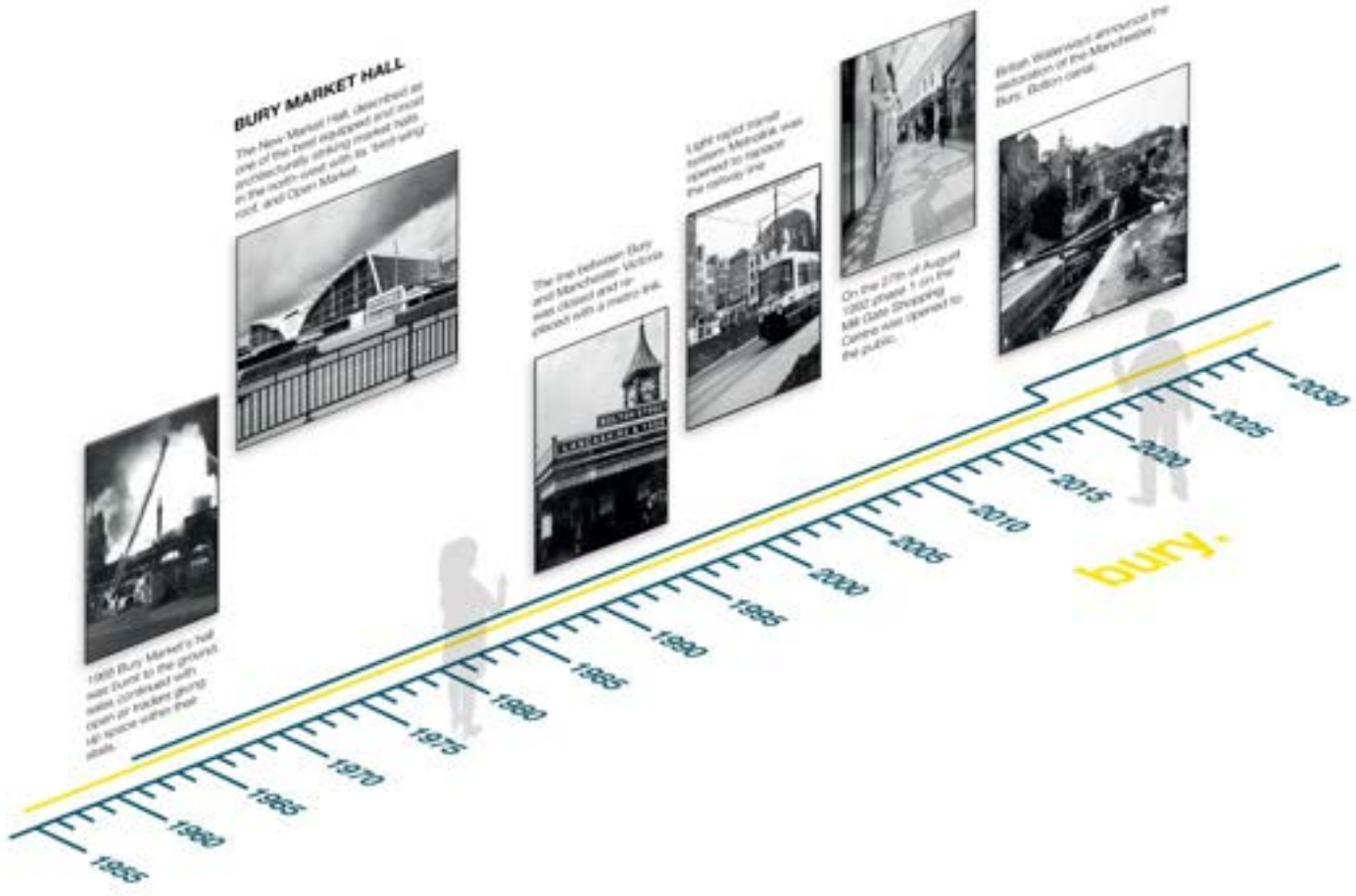
- £2.5m of Government funding to decarbonise a number of Bury buildings, including the Market Hall and Bury Town Hall; and
- The introduction of 12,181 low energy LED streetlights – bringing the total number of LED streetlights in Bury to 60%.

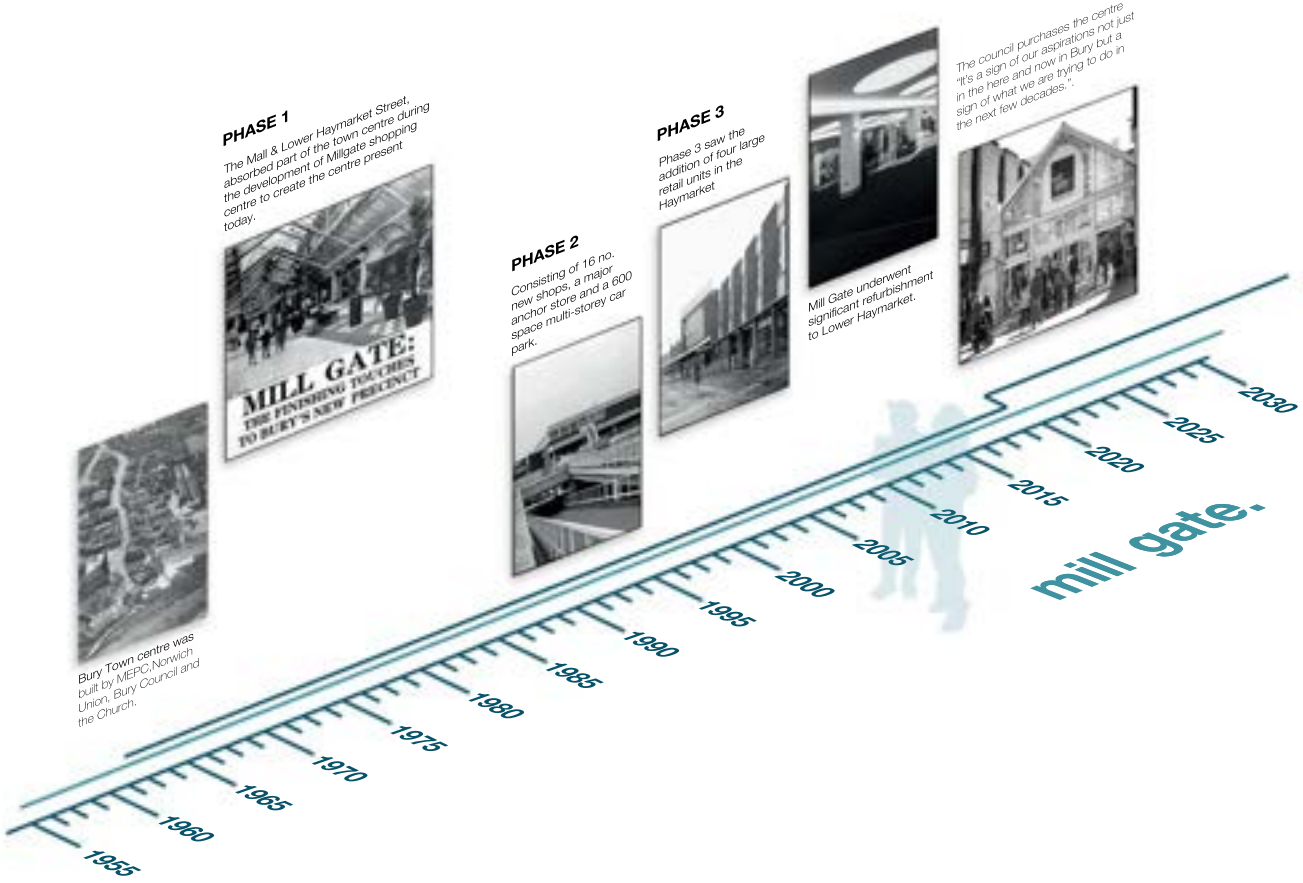
The NPPF and Greater Manchester PfE recognises the importance of the natural environment in promoting inclusive growth by contributing to the creation of sustainable and healthy communities. This includes the protection and enhancement of the natural environment, such as green spaces, biodiversity, and green infrastructure.

8.2 Appendix 02: Site History and Surrounding Context

Site History

Bury emerged during the Industrial Revolution as a mill town manufacturing cotton, a trade which was spearheaded by the Peel family through the 18th and 19th century. This trade continued until the post-war period, which saw a major decline in the cotton industry. As a result of the economic decline, the old shopping area centred around Princess Street and Union Square was demolished in the 1960s – the site of which would eventually become the Mill Gate Shopping Centre in the latter half of the 20th century. The 1960s also saw the original Bury Market burn down, with the existing "New" Bury Market Hall completed in 1971.




PHASE 1
The Mall & Lower Haymarket Street, absorbed part of the town centre during the development of Millgate shopping centre to create the centre present today.
MILL GATE: THE FINISHING TOUCHES TO BURY'S NEW PRECINCT
Bury Town centre was built by MEPC,Norwich Union, Bury Council and the Church.
PHASE 2
Consisting of 16 no. new shops, a major anchor store and a 600 space multi-storey car park.
PHASE 3
Phase 3 saw the addition of four large retail units in the Haymarket
Mill Gate underwent significant refurbishment to Lower Haymarket.
The council purchases the centre "It's a sign of our aspirations not just in the here and now in Bury but a sign of what we are trying to do in the next few decades.".
1955
1960
1965
1970
1975
1980
1985
1990
1995
2000
2005
2010
2015
2020
2025
2030
mill gate.

Historic Mapping - Site Ownership overlay

1884



1897



1908



1947



1967



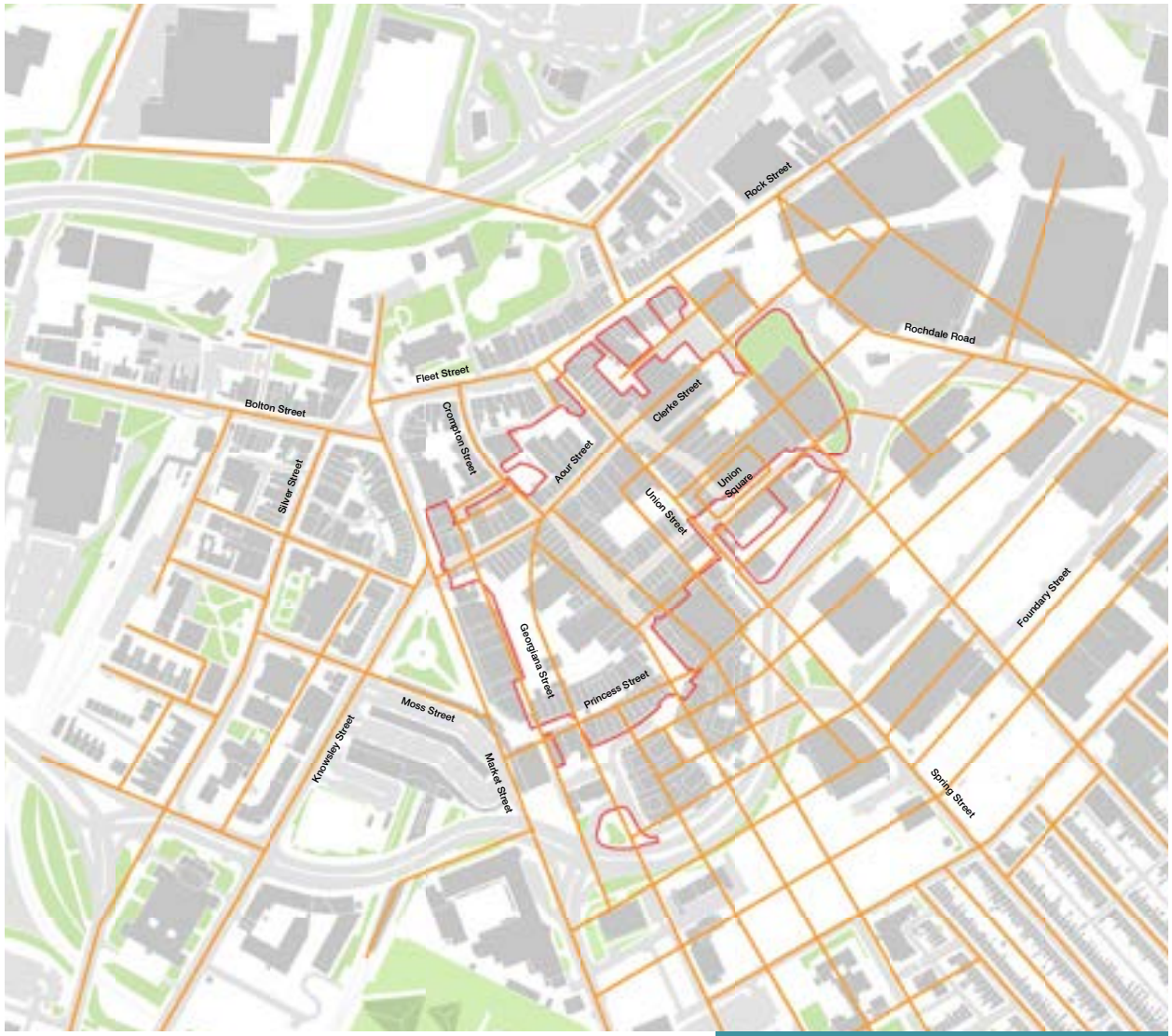
2022



TODAY



Historic Street Pattern Overlay



Key

Historic Street Grid

Surrounding Context

The Framework Area is surrounded by a range of uses of varying scale and configurations. To the north of the Framework Area is the Church of St Mary the Virgin and the Rock, Bury's historic high street. Further note, beyond the Rock and Peel Way there are a number of modern industrial estates and surface level car parking. To the north-east of the Framework Area there is a concentration of Victorian-era terrace around the A56, which passes through Bury toward Burnley.

To the west of the Framework Area is Bury's historic quarter, featuring the highest proportion of the town's Listed Buildings, and the Bury Bolton Street Heritage Railway. Further west is the Bury Leisure and A56, linking Bury to Bolton. To the east of the Framework Area is a number of retail parks and supermarket superstores, and their associated car parking. Further east is a high concentration of Victorian terraced housing, Openshaw Park and eventually the Bury Easterly Bypass (M66), linking Bury to other regional towns and cities.

To the immediate south of the Framework Area is Bury Market, a key asset to the town and wider Borough. Further south, beyond Angouleme Way is the main campuses for Bury College, including their new campuses and sports fields. Fishpool, a historic area of grid-patterned Victorian terrace housing is located beyond Bury College campus, which is one of Bury's most deprived areas in the whole Borough.

The Framework Area is largely cut off from the rest of the town on all sides by busy A-roads, with Peel Way cutting off pedestrian access to the north, Jubilee Way reducing permeability to the west, Angouleme Way to the south and Derby Way to the east.



Mill Gate Aerial View

8.3 Appendix 03: Strategic Regeneration

Introduction

The following section identifies the key drivers that underpin why investment and regeneration in the Framework Area is necessary to support the long term sustainable future of Bury Town Centre, as well as to maximise the beneficial outcomes and opportunities for local residents.

Levelling Up Agenda

There is a recognised geographical inequality across the UK, with northern towns and cities falling behind its southern counterparts, particularly when compared to the south east. The Government's Levelling Up agenda seeks to transform places and boost local growth in locations across the UK that have stalled, to ensure that the UK's success is shared equally. The Levelling Up agenda seeks to challenge and change the recognised imbalance by improving regional productivity, boosting economic growth, encouraging innovation, creating good jobs, enhancing educational attainment and increasing the standard of living and wellbeing of local communities. It seeks to build upon the strengthens of each location, spreading opportunities for individuals and business to make the UK economy stronger, more equal and resilient.

GMCA Devolution

To support levelling up ambitions the UK Government recognises the need to rely on the empowerment of local leaders to develop local solutions to local problems. The first local devolution deal, which included the introduction of a metro mayor, was between the UK Government and Greater Manchester Combined Authority (GMCA) in 2014.

Devolution provides GMCA with new policy levers, functions and responsibilities, as well as enhanced accountability. This includes providing GMCA with powers covering transport, business support, employment and skills support, policing, spatial planning and housing investment. GMCA has and continues to use these powers to drive growth and deliver improvements to the local economy, services and infrastructure.

Bury Town Centre is benefiting from the Government's Levelling Up Fund, with the Council having secured £20m to support transformational improvements at Bury Market, the development of a new Flexi Hall and enhanced public realm improvements.





1// Bury Market Roof - Levelling Up Funded
2// Flexi-Hall - Levelling Up Funded

1// Bury Interchange - Metrolink
2// Manchester Piccadilly Station
3// The Rock -Northern Powerhouse Study

Connectivity

Connectivity is a key aspect of generating economic growth and establishing Greater Manchester as a top global city region. The UK Government is seeking to deliver priority rail projects across the north that can drive local economic growth. This large scale investment represents indicant opportunities for regeneration and levelling up.

Improved connectivity and transport infrastructure can boost productivity by connecting people to jobs, businesses, education and wider opportunities. It also supports wider quality of life, positive health outcomes and local pride by helping to regenerate high streets and towns, supporting local communities to increase physical activity, socialising and access to services. There is a significant variation in the quality of transport connectivity across the UK which impacts local economic and social outcomes.

The region already benefits from good connectivity to London with direct rail links. Proposals for improved rail infrastructure will reduce journey times between regional cities, helping to deliver a more integrated national economy and support greater opportunities to deliver balanced economic growth.

Northern Powerhouse

Northern Powerhouse seeks to counterbalance the dominance of economic growth in London and the South East by delivering more even, inclusive growth across the UK. Northern Powerhouse seeks to join up Northern towns, cities and counties by pulling together strengths and tackling barriers to productivity to unlock the economic potential of the North.







Mill Gate.

The commitment to promoting equality of opportunity and driving investment across the North has been key priority for successive Governments, and serves as a golden thread that runs through all Levelling Up initiatives.

Greater Manchester's Economic Growth

Greater Manchester seeks to establish itself as a top global city and in order to achieve this it will require a number of characteristics, such as a strong economy, skilled residents, high quality place and environment and a diverse portfolio of investment and development opportunities.

Greater Manchester's has seen unprecedented growth over the past two decades. The Greater Manchester region has a resident population of over 2.8 million and a combined GVA of over £62.7 billion. Greater Manchester has seen significant economic growth, supported by the region's expanding international connections and centres of excellence in research and higher education, which has diversified labour markets and necessitated investment in Greater Manchester's transport infrastructure. Greater Manchester currently benefits from a thriving globally competitive manufacturing sector, an internationally renowned cultural and sporting economy, and a vibrant digital sector.

Greater Manchester's economy continues to benefit from growth in financial and professional services and is being further strengthened and diversified by high added value growth in key sectors.

The regional centre has seen unprecedented growth over the past two decades. Investment in new homes, businesses, infrastructure and the public realm has positively impacted on the city region's economy and profile.

Northern Greater Manchester Opportunity

Overall, the northern areas of Greater Manchester, have struggled to compete with boroughs in the south of the conurbation, when considered against socio-economic performance. In light of this, Greater Manchester's Places for Everyone ('PfE') Plan identifies the need to deliver high levels of economic growth to support the prosperity of Greater Manchester, whilst ensuring that all boroughs and residents share the benefits. It also recognises that there is a need to deliver high quality of life for *all* residents and address existing issues, such as health inequality and air quality that currently detract from this.

Given the relatively low levels of growth in northern areas of Greater Manchester when compared to other parts of the city region, there is an identified need to address the disparities between the north and the south. Two key locations have been identified within PfE, as having the potential to deliver significant benefits to the wider area and increase prosperity for the northern areas as a whole – namely the North-East Growth Corridor and the Wigan-Bolton growth corridor.

North-East Growth Corridor

Within Greater Manchester, one of the most significant proposed interventions in the northern areas is focused on the M62 corridor extending across part of Bury, Rochdale and Oldham. This includes the Northern Gateway site which is an extensive area located around junctions 18 and 19 of the M62 underpinned by two key sites straddling Bury and Rochdale.

The Northern Gateway represents a significant opportunity within the North-East Growth Corridor to deliver extensive economic growth for the wider area. This scalable opportunity is identified within Places foe Everyone Joint Plan. This strategic allocation will enable the delivery of a large, nationally-significant employment opportunity to attract high quality business and investment, with a complementary housing offer on the M62 corridor, where there is strong evidence of market demand.

The Northern Gateway will provide a massive expansion of the existing employment areas, helping to deliver a better distribution of growth across Greater Manchester, boosting the economy and unlocking inclusive growth in the north of the region. Across the two site allocation, 2,750 new homes and 1.2M sqm of industrial employment space is proposed, set to deliver significant socio-economic benefits for the area, including Bury Town Centre.
The allocation recognises the need to enhance public transport provision, with significant interventions required to promote sustainable travel and ensure that the employment opportunities are more accessible to the wider local labour pool. In light of this, there is the identified potential to deliver a tram-train on the East Lancashire rail link between the boroughs of Bury and Rochdale



Role of the Town Centre Regeneration

Whilst growth to date has been centred around Greater Manchester's Regional Centres, there is a recognised need to strengthen the role of town centres at a national and regional level. At a national level this is evidenced by various Government funding initiatives such as Future High Street Fund and Towns Fund. Whilst different funding initiatives continue to emerge under different names, there will remain a continued focus on the role of the town centre and high street.

Ensuring the vitality of town centres is further supported at the national level, within Section 7 of the National Planning Policy Framework (NPPF). The NPPF recognises the role town centres play at the heart of local communities and the need to positively approach their growth, management and adaptation, including by promoting the long-term vitality and viability of town centres by allowing them to grow and diversify by responding to changes in the retail and leisure market, allowing a suitable mix of uses (including housing) and reflecting local distinctiveness.

Prospects for further economic growth for Bury are closely tied to the Borough's ability to attract and retain professional services and the best talent. It is therefore critical to focus efforts on improving the town's attractiveness as a location to live, study, work, invest and do business. In this regard, a key priority for this Framework is the delivery of high-quality homes and the introduction of more diverse uses, located within a well-connected, attractive neighbourhood of choice.

1// High Street Amenity Spaces
2// High Quality Homes
3// Places to Work
4// Town Centre Regeneration









Catalytic Component of Bury Town Centre Masterplan

The Framework seeks to enhance Bury's strategic role within Greater Manchester by creating an attractive and vibrant town centre hub through the delivery of sustainable development that blends a dynamic retail, leisure and residential offer. The evolution of the Mill Gate will support future growth by strengthening the town centre's reputation as sustainable and attractive place for future investment within and beyond the Framework boundary.

The Mill Gate represents a significant component of Bury Town Centre's Masterplan which sets out the opportunity for transformative change over the next 20 years in the town centre. The Masterplan recognises the need for Bury to adapt to the changes in the UK's retail market, be attractive and open to inward investment and encourage high quality, mixed use development that supports the long term vibrancy of the town.

The evolution of the Mill Gate and future investment represents a key opportunity for future proposals to unlock inclusive growth and support the broader regeneration, economic and social ambitions and opportunities for Bury Town Centre. Future strategic considerations and opportunities outside of the Framework area will be drawn out and supported by the successful delivering of the Framework's regeneration programme – supporting potential longer term major infrastructure, funding and land assembly requirements, including catalysing future investment to deliver the ambitions of the Bury Town Centre Masterplan.



1

1// Mill Gate
2// UK High Street - Decline in Demand
3// The Future High Street is a more diverse place to be, and must respond to a wider use

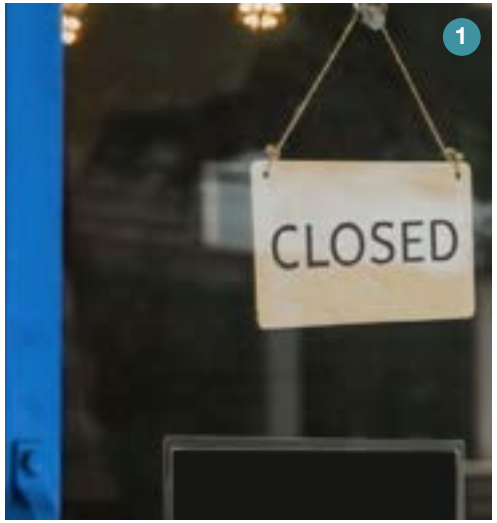
Decline of Traditional Retail

The high street retail market has already seen significant downturn in recent years. The industry has faced large-scale business restructuring with significant job losses and store closers on the high street, whilst online sales have continued to grow. This expansion in the online market share has drawn customers away from traditional high street shops and department stores.

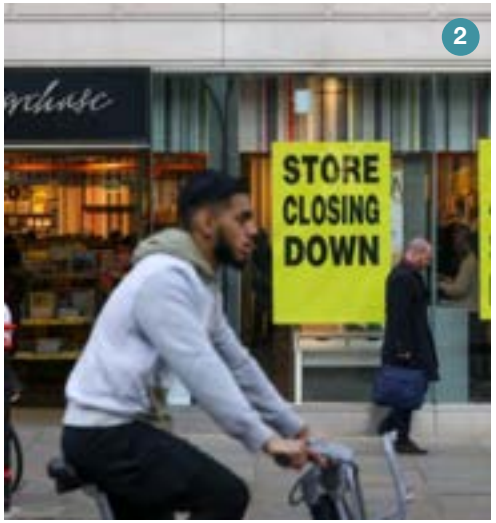
The UK Government launched its long-term plan to support the evolution and regeneration of high streets in 2021. The Government's Future High Streets Fund aims to renew and reshape town centres and high streets to deliver growth and ensure future sustainability and its Build Back Better (July 2021) policy strategy document recognised the importance of the high street in support the UK's post Covid-19 recovery.

Changes in the retail market are reflective of a changing pattern of consumer behaviour as it adapts to take advantage of lower pricing and ease of comparison, flexibility and the convenience of click & collect and home delivery. An accelerating reduction in revenues through physical stores plus a general improvement in supply chains has, in most towns and cities, led to a rapid decline in sales densities and a reduced need for expensive retail floor space. These trends and the resulting oversupply of retail has simultaneously been reflected in reduced rents and other occupational overheads. As a result, where rents and costs remain high, this has had an increasingly significant drag on retailer performance, particularly on larger format stores. This has resulted in the loss of major high street retailers, such as British Homes Stores and Debenhams.

Town centres therefore need to adapt and respond to changing circumstances to support their long-term vitality and to successfully meet the needs of local and surrounding communities. Whilst the more established retail, leisure, cultural and community functions of town centres will remain key, this provision will need to evolve. This may include the rationalisation of traditional retail floorspace to respond to identified growth in more 'experience-driven' retail offerings, which is considered more resilient, better able to respond to changing trends, and something which cannot be replicated online. This includes the growing popularity of organic, wellbeing and health-focused retailers, which offer an experience more comparable to a service than a typical shopping experience.



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1// Princess Parade - Evening Retail Closed
2// 'Birdies'- Crazy Golf Amenity
3// Silver Street - Bury Town Centre

Town Centre Investment and the Evening and Night-time Economy

Evening and night-time activity has the potential to generate increased economic activity within town centres whilst also providing additional employment opportunities. The introduction of evening and nigh time uses with town centres also supports the diversification of uses and helps town centres to develop their reputation and identity as an attractive leisure destination.

Bury, as the sub-regional centre for the Borough, has attracted some investment in the last 15 years, most notably with the Rock development which opened in 2010. Bury town centre also has Purple Flag status in recognition of the management of the evening and night-time economy – however, despite this accolade, there is an acknowledgment that more opportunities should be explored to grow the night-time economy and activate the town centre in the evenings. To cater to Bury's diverse demographic, it's crucial to offer spaces and places that appeal to different cultures. Providing a range of attractive opportunities, beyond alcohol consumption and competitive socialising is key to meeting the needs of a mixed community.



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Needs of Wider Community

Town Centre Catchment

The Bury Town Centre area has a population of 47,000 people – accounting for just under a quarter (24%) of the Borough's total population. The town's working age population accounts for 64% of the total population – a slightly higher proportion to the Borough (reflecting a slighter younger population and location for families).

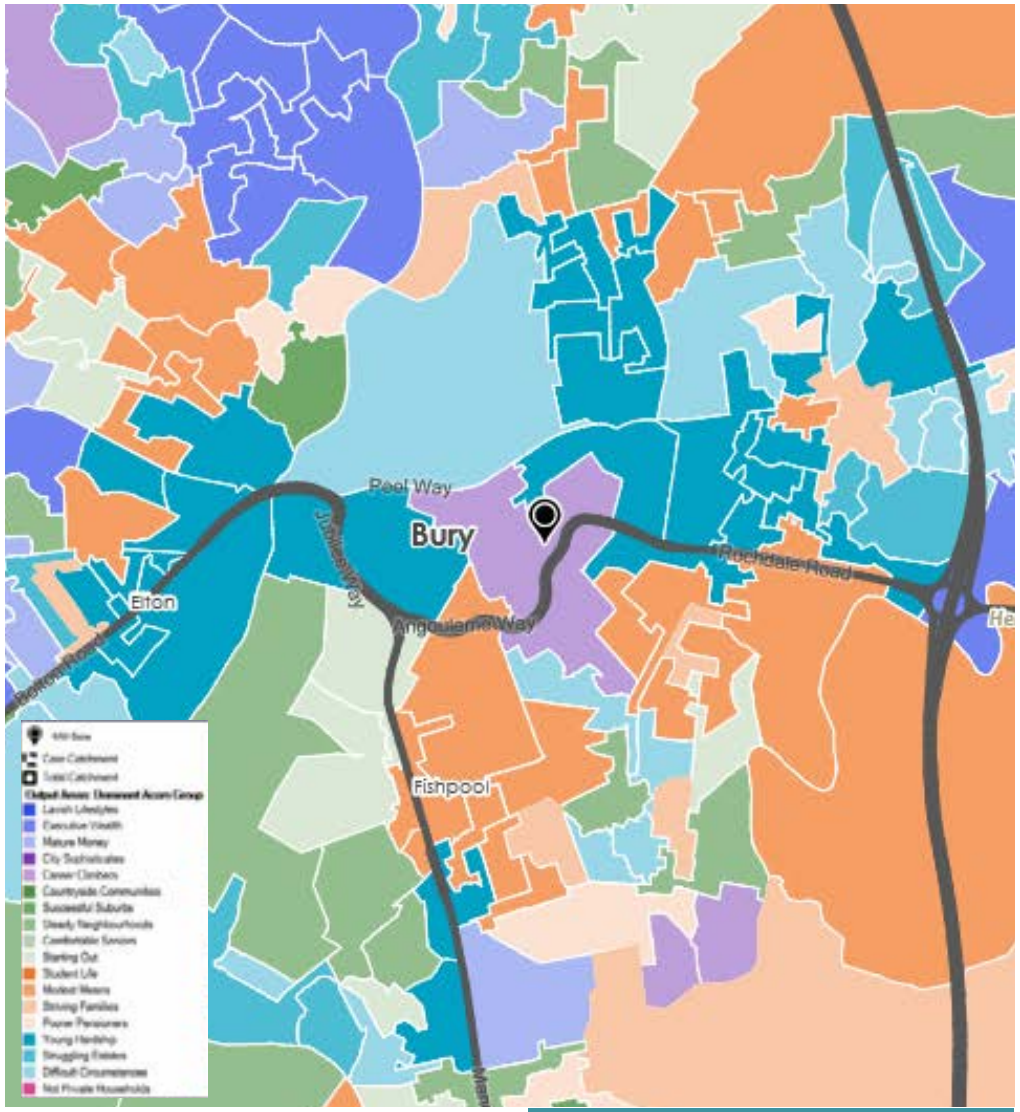
The town centre population has risen by 3.8% since 2015, which is higher than the Borough average and North West, where it rose by 3.2% and 3.4%, respectively. Overall, the population within the town is younger and more ethnically diverse than the Borough in general. Based on current predictions this is likely to evolve, and change as the Borough's overall population is forecast to age, the opportunities offered by the redevelopment of the Mill Gate, as well as the town's wider regeneration ambitions, should consider the needs of a diverse population.

Bury Town Centre's principal catchments consists of 329,000 residents, with 1 in 3 residents (34%) treating Bury as their primary shopping destinations. When benchmarked with other town centre locations, there is an identified potential for this to rise to 40% with improvements to the town centre offer and visitor experience.

The existing value-led offer of the town centre, including the Mill Gate, largely serves the retail needs of a quarter of Bury's residents and expected shoppers. Data suggests Bury Town Centre is a location where visits are due to convenience rather than somewhere for people to enjoy and dwell for longer periods of time at the weekend.

Bury College and nearby schools likely play an important contribution to the 23% visitors aged 0-17 years old. Visitor insight data however shows that 0-14 age group and 65+ make up the highest proportions of Bury Town Centre and Mill Gate Shopping Centre visitors. This suggest that young people are leaving Bury when they reach late teens, and so there is an identified need to reverse this trend by providing appropriate and attractive housing, employment opportunities and leisure activities that addresses the needs of this demographic.

Overall, there is an opportunity to diversify the town centre offer and enhance the physical environment to deliver a more mixed, accessible and inclusive town centre to attract a broader cross section of the community, from Bury and across Greater Manchester.



Demographic analysis - PRAGMA Analysis

1// Mill Gate Shopping Centre
2// Angouleme Way Retail Park
3// Silver Street
4// The Rock Shopping Centre
5// Moorgate Retail Park
6// The Rock High Street

Bury's Retail Offer

Bury is the sub-regional centre for the Borough and main retail and commercial centre. The town centre continues to be the key retail destination in the Borough and, particularly since the opening of the Rock in 2010 to complement the Mill Gate centre and Market, the town centre has raised its sub-regional profile and attractiveness. The Rock development resulted in a shift in retail activity within Bury town centre, with multiple retailers relocating from the Mill Gate. The Mill Gate operations team have sought to maintain occupancy levels in challenging conditions. In particular, in the context of changing consumer habits, such as online retail, as well as the increasing demand for leisure and experience driven uses, independent retails and food and beverage provision.















1// Princess Parade
2// Street Performance - Union Street
3// Union Arcade
4// CACI Demographics information

The Mill Gate Shopping Centre

The Mill Gate shopping centre opened in 1992 and was Bury's premier shopping centre until the opening of the Rock in 2010, which attracted many of the popular high street retailers away from the Mill Gate. Over the last 10 years, the Mill Gate has since become the home to smaller, more local retailers as well as budget, low-value retailers.

The Mill Gate Shopping Centre exhibits a significant amount of retail duplication, particularly in the value offer. There is an opportunity to reduce duplication and vacancy by introducing more mid-range national brands and expanding dine-in food & beverage options to enhance the appeal of Mill Gate to a broader customer base. The introduction of more casual dine in options could for example create opportunities for the local community and visitors to dwell. There is also an opportunity to enhance the Mill Gate environment and visitor experience by seeking to attract brands with a strong local presence to uplift the quality of the retail offer and its attractiveness to the local audience. There is an identified need within the Mill Gate to attract good stable tenants to support the long-term viability and vitality of the Mill Gate.

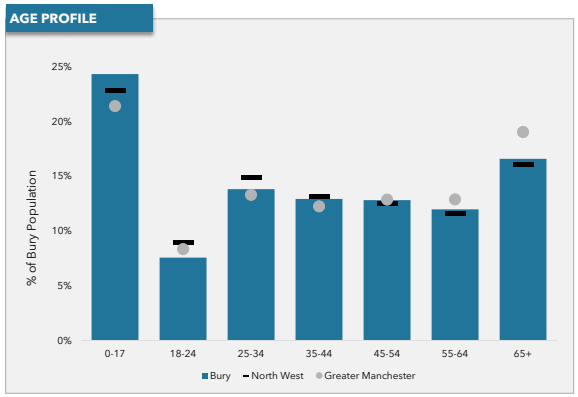
Whilst Mill Gate has a strong local shopper base, there is opportunity to drive visits from further afield. A survey undertaken by CACI in 2022 established insight into the demographic of Mill Gate visitors. The Mill Gate appeals to an older demographic, with over half of respondents aged over 55. This presents an opportunity to drive more family visits, as parties with children fall below the benchmark average, as well as lower visits from 25-54 year olds who are most likely to have children. It remains important to maintain the loyalty of Mill Gate's existing local customer based to support their continued use and interaction with the Mill Gate.

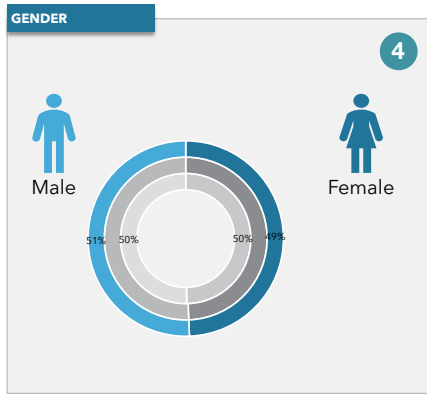
As identified in the Bury Town Centre Masterplan (2022), retail and the high street has a significant role to play in the regeneration of the Mill Gate. Whilst the popularity of e-commerce cannot be denied, there has been an identified growth in more 'experience-driven' retail offerings which is more resilient and better able to respond to changing trends and cannot be replicated online. This includes the growing popularity of organic, wellbeing and health-focused retailers, which offer an experience more akin to a service than a typical shopping experience. There is a recognised need for retail offerings in the Mill Gate to diversify to support the long-term vitality and vibrancy of the high street and town centre.












Centre Directory

Bury Market

Bury Market, which has secured £20m of funding from the Government's Levelling Up Fund, is a nationally renowned cornerstone of Bury heritage and identity. Having been voted Britain's favourite market in 2019 and 2023 by The National Association of British Markets, it plays a vital role in Bury's local economy, providing hundreds of jobs, bringing in large amounts of revenue for the town and supporting a loyal customer base – with the market being particularly well-used by households living in deprived neighbourhoods and older people living alone.

Despite the market's popularity, a number of deeply ingrained issues threaten its long-term vitality, including the growth of international corporate retailers and the popularity of budget supermarkets. The rise of online shopping, outdated infrastructure, and a narrowing base of traders and customers exacerbate these problems.

Bury Market exhibits significant duplication in its offerings, particularly in the clothing and footwear. The Market would benefit from reducing lower-quality and duplicated offerings whilst preserving vendors of cultural significance, such as Bury black pudding. Introducing more local businesses and entrepreneurs selling quality products would enhance the market's cultural image and expand the customer base.

The last major investment in the Market Hall came in the 1999s, and the physical infrastructure is in desperate need of upkeep and investment. Since this last investment, the dynamics of the town centre has changed – with the development of The Rock shopping district reflecting the change in demands of local residents.

The market therefore faces challenges with the quality of the environment impacting the visitor experience. This presents an opportunity to promote more thoughtfully designed and neatly presented stalls whereby the market would benefit from enhanced fit outs to create a more appealing and attractive shopping environment. Given the extensive size of Bury Market, this also presents opportunities to improve the public realm for example introducing seating and greenery.

Drawing on the success of other markets across the UK, there is also a clear opportunity for Bury Market to establish a clearer zoning of food and retail, where F&B uses could be located in one area with some retail and another section for solely retail. This would further enhance the visitor experience by creating a more legible and functional space.

The Levelling Up funding will contribute to the delivery of a new, high-quality, multifunctional 'Flexi Hall' event venue at the town centre gateway to enhance the community, cultural and leisure offer of the town. This is not intended to replace the Market, instead being envisioned as a complementary offer to rejuvenate the success of the Market.

The funding will also provide new physical infrastructure to futureproof the Market, including new roof canopies, decarbonisation, maintenance and repairs. In addition to these improvements, the funding will also be used to provide public realm to better link Bury Market with the town centre, including Bury Interchange, Bury College and other civic infrastructure. These new areas of public realm will also provide spaces for shoppers, retailers and visitors to spill out into – creating a more active, engaging experience.



Bury Market - Angouleme Way Entrance

A Long Term Retail Strategy

Bury town centre has a loyal customer base and excellent connectivity via the transport interchange, whilst both the Mill Gate and The Rock offer a diverse range of leisure amenities.

However, the town centre's existing cost-conscious customer base poses challenges in attracting tenants, resulting in an oversupply of retail provision. The town centre faces challenges around vacant units and a high proportion of charity shops, temporary shops and smaller bargain brands, hindering its ability to attract high quality tenants and more prominent national brands.

There is an opportunity for Mill Gate to adapt and respond to support its vitality and long term success whilst responding to the needs of existing and future communities. By incorporating a diverse range of uses, including a diversification of the existing retail offer, new residential accommodation, a more diverse leisure and food and beverage the Mill Gate can look to retain its existing strong loyal customer base, whilst increasing its attractiveness to a wider audience.









City Region Productivity Gap

The Northern Powerhouse concept is underpinned by a need to tackle major barriers to productivity to unlock the full economic potential of the North. Greater Manchester has developed a Local Industrial Strategy (July 2019) which sets out how the region will harness its strengths and opportunities and the talent and creativity of its people to create a digitally enabled and green place. The Strategy is set around two key objectives: supporting the city region's globally competitive strengths and strengthening the foundations of the city region's economy. It recognises that Greater Manchester's productivity level is approximately 10% lower than the national average, whilst recognising the city region's key economic strengthens as its size and diversity.



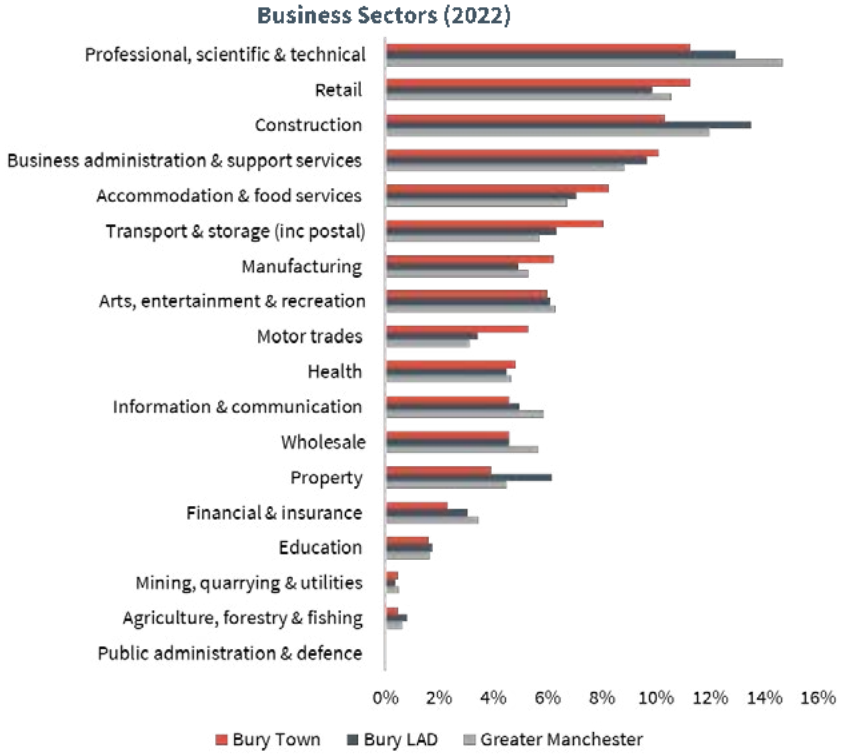
Economic Performance

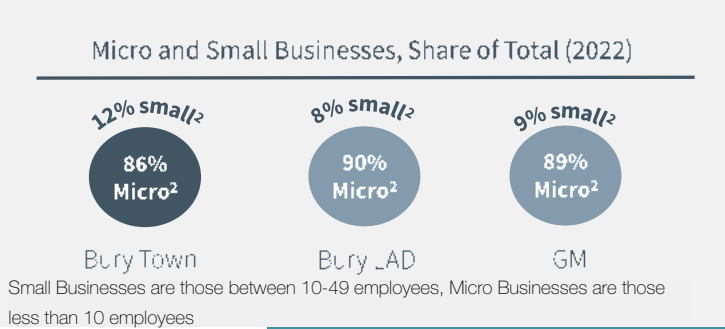
Measured by Gross Value Added (GVA), Bury contributed around £3.5 billion to the UK economy in 2019. Compared to its Greater Manchester counterparts, Bury is one of the lowest contributors of GVA. Alongside Rochdale and Oldham, Bury comprises the lowest share (5%) of Greater Manchester's total GVA. Over the past two decades Bury's GVA growth has steadily increased. However, Bury's economic growth continues to lag behind Greater Manchester as a whole, as well as regional and national comparators. This gap has widened since 2008.

Analysis at a smaller geographical scale reveals that Bury's GVA is largely driven by higher concentrations of output in and around the centre of Bury, whilst areas on the periphery around Ramsbottom and Prestwich have lower GVA output. This likely reflects the structure of Bury's economy with a larger number of businesses and employment located in the centre of Bury.

Wholesale and retail trade is the largest contributor to Bury's economic output - equivalent to £400m per annum and accounting for nearly a fifth (19%) of total GVA in 2019. Other important sectors include real estate (16%) and manufacturing (12%). Over the past decade, the professional, scientific and technical sector (+59%) and wholesale and retail trade sector (+43%) have experienced the strongest productivity growth.

There are sectors in Bury which have seen a higher growth in GVA output compared to the England average. This includes public administration (41% versus 22%) and retail and wholesale (43% versus 33%). However, there has also been a notable decrease in GVA amongst sectors which have grown at an England level, particularly information and communication (-366% versus 55%), financial and insurance (-40% versus 6%), and transportation and storage (-16% versus 47%).





Pathways for Education, Skills, Training and Employment

Employment Hub

Bury town centre is a key employment hub for the borough with employment primarily driven by retail and food services, health and education and business administration and support sectors.

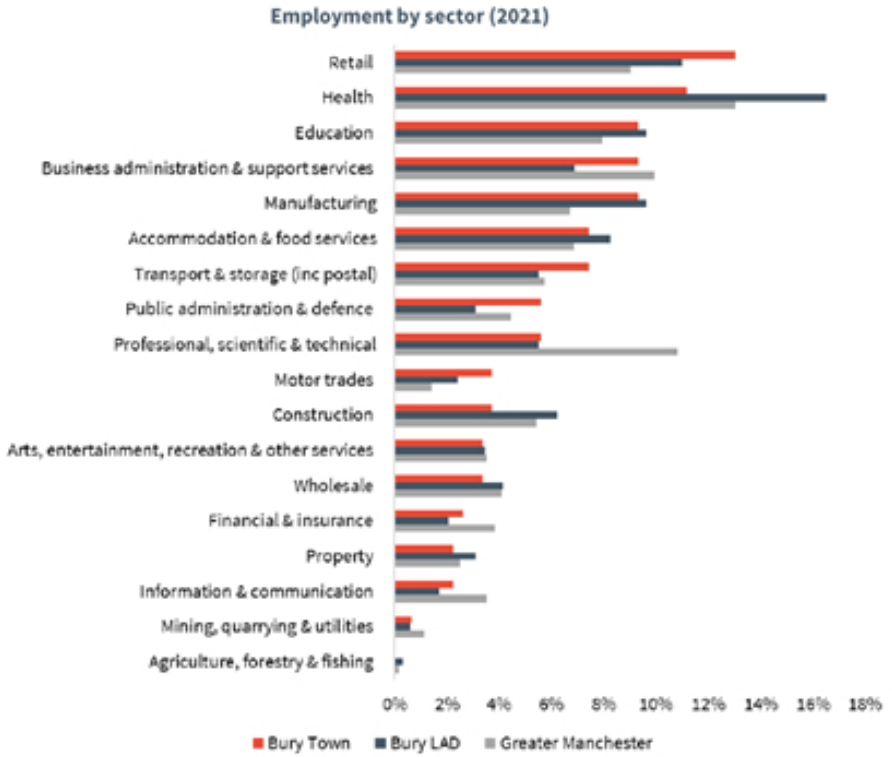
The town centre has approximately 27,000 people employed within the area, accounting for 38% of all employment in the Borough, reflecting the importance of the centre as a key employment hub . Since 2015, there has been a stable growth in the number of people employed in the area – however, the employment growth rates remain significantly lower than the growth experienced across Greater Manchester as a whole (8% compared to 13%) over the same period.

The most prominent employment sector in the town centre is retail– accounting for 13% of total employment in the area. When combined with the food services sector, this constitutes 20% of all employment in the town centre. The health sector is also a prominent sector within the town, accounting for 11% of employment, followed by education, business administration and support services (accounting for 9% respectively).

The healthcare and education sectors are significant sources of employment in the borough, but they are largely dependent on public sector jobs. While this is not necessarily a disadvantage, it does mean that over 25% of workers in the borough are employed in the public sector, compared to just 22% in the wider North West region. This could make the borough more susceptible to future risks, such as budget cuts that could lead to job losses and reduced opportunities for residents.

Over 74,000 residents leave the borough for work. This contributes to a self-containment rate (the proportion of residents living and working in their place of residence) of 44%. This means that nearly two-thirds (66%) of residents leave the borough for work (mostly to other parts of Greater Manchester and Lancashire). Bury's lower than average job density reflects its proximity to larger regional centres such as Manchester and Salford, which supported by good road and public transport links enables residents to access these job opportunities outside of the town centre. While outflow commuting is not inherently a challenge, it does imply a lower degree of opportunity within the borough and therefore a reliance on surrounding areas for employment and prosperity.

There is an opportunity to increase the number of job opportunities within the town centre for local residents across a range of sectors and skills levels. Greater diversification in employment sectors within the town centre would support the creation of a more sustainable and attractive employment market locally.



Sources: ONS BRES, 2022, ONS Jobs Density, 2021

Business Base

There are approximately 2,175 businesses located in the town centre. In addition to accounting for 38% of all jobs in the Borough, the town centre also accounts for over a quarter of all businesses, reflecting the importance of the town as a key hub for the Borough. Bury town centre has a higher-than-average proportion of small businesses, accounting for 12% of all businesses – slightly above the Borough average (8%) and Greater Manchester (9%).

The borough's businesses are predominantly in the micro businesses category, often self-employed businesses. Over 90% of the businesses in the borough employ fewer than 9 people. The borough has a higher-than-average business density rate of 68 businesses per 1,000 working age adults (GM business density of 59 businesses per 1,000 working age adults), highlighting the borough's entrepreneurial activity. However, it also indicates that the business base in the borough is typically made up of some of the most vulnerable types of businesses that may be highly exposed to economic shocks.

Residents 16-64 with NVQ4+ qualifications 2021:

- 43% Bury Local Authority Area,
- 39% Greater Manchester,
- 39% North West

Education, Skills + Earnings

The borough's connections to Greater Manchester are a significant asset and provide job opportunities for residents, with these roles tending to be oriented around higher level skills. For the borough's residents to access and benefit from these jobs there is a need to invest in higher level skills to support them.

Overall Bury residents are highly qualified with high levels of employment amongst all demographic groups. The Borough's working age population is well qualified, with 43% of residents having higher education qualifications (NVQ4+) . This level of attainment is above both the Greater Manchester (39%). This rate is in line with the England level of 43% however lags behind other GM boroughs of Trafford (55%), Manchester (45%) and Stockport (47%). The borough must invest in the skills base of its workforce to ensure it can maintain and further develop a competitive skills supply offer in the Greater Manchester city region.

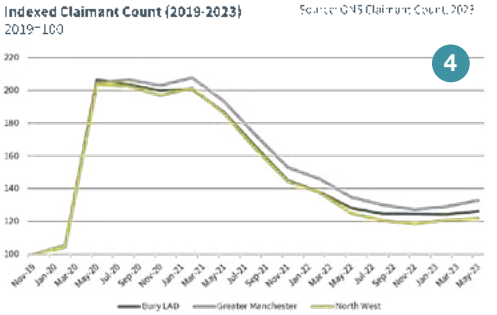
The latest ONS data highlights that residential based earnings in the borough are almost £4,000 higher than workplace based earnings (which in the borough are lower than those in Greater Manchester and the North West). This indicates and further reinforces the role of out-commuting in the borough.

1// Bury College HE teaching
2// Bury Mill Gate Job Centre Jobs Fair
3// Bury College
4// Demographics income information









GDHI - Gross Disposable Household Income (2020)

Bury Local Authority Area	Greater Manchester	North West
£19.2k	£18.2k	£22k

Source: ONS GDH , 2021

Average earnings (2021)

Source: ONS ASHE, 2022

	Bury Local Authority Area	Greater Manchester
Median Resident based Earnings	£32.3k	£30.1k
Median Workplace based Earnings	£28.1k	£30.7k

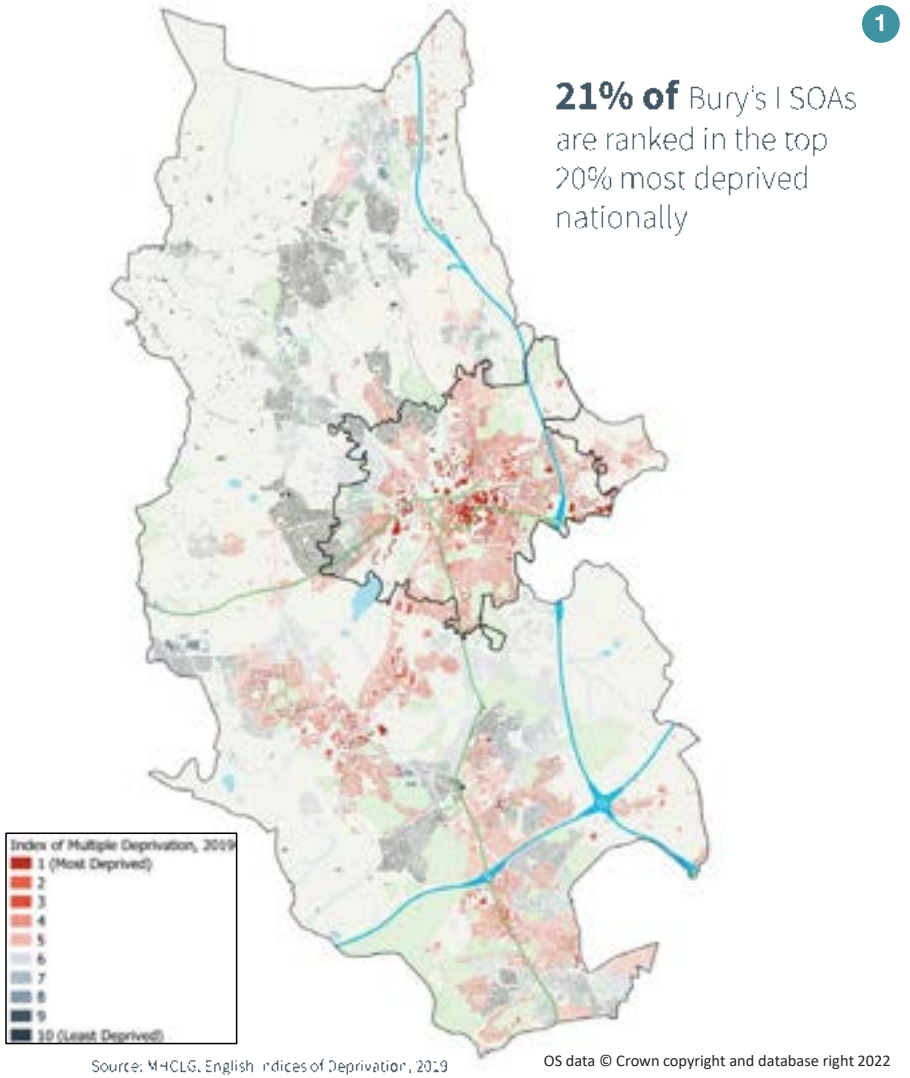
1// Bury Deprivation Illustration showing the potential the centre has to transform the town

Catalytic Investment – Creating Good Jobs for Locals + Supporting Small Businesses

This Framework provides the opportunity for Bury town centre to provide a mix of workspaces and units which meet the demands of such a varied employment sector. Whilst retail and leisure is key to achieving long-term success, Bury is also home to a thriving mix of micro and small businesses across a range of professional and technical sectors. This provides an opportunity to deliver flexible and affordable workspaces, attractive to the existing business base as well as a broader base of businesses.

The opportunity, through regeneration and future investment, to support and create more local employment opportunities. There is an important opportunity to attract a mix of new and potentially higher paying employment opportunities to the town centre which local residents could access and benefit from. A more diverse and improvement employment offer, alongside leisure and residential) could also play an important role in encouraging younger residents to stay or relocate to Bury. Attracting and retaining skilled local residents can stimulate wider economic growth through increased local expenditure.

A more vibrant Bury town centre with a diverse mix of housing types and tenures, employment opportunities, retail and leisure options, alongside strong connectivity, will play a key role in attracting and retaining skilled residents.



Bury Deprivation Illustration showing the potential the centre has to transform

Housing Crisis

The UK is facing a housing crisis, where many people across the country are unable to access suitable, affordable housing. A lack of suitable housing options prevents many people form purchasing homes, including younger adults, whilst others have substandard or expensive rental accommodation. Whilst the majority of the UK population may have access to good housing, there is a need to address the housing shortage in order to deliver a more sustainable, balanced housing market. There remains a significant need to deliver a diverse range of new homes, including bolstering the supply of affordable homes.

In 2017 the UK Governments white paper "Fixing our broken housing market' set out a number of Government plans to help reform the housing market and increase the supply the of new housing. Significantly boosting the supply of homes remains a key objective for the UK Government, including by ensuring that the right homes are provided in the right places, homes are built faster and that the housing market is diversified.

Brownfield First

At a national level, substantial weight is given to the value in utilising suitable brownfield land within settlements for homes and other identified needs to ensure an effective use of land. This is further reinforced at a regional level within PfE which includes is a clear brownfield preference policy, seeking to maximise the use of brownfield land and urban spaces while protecting Green Belt land from the risk of unplanned development.

Residential development in Town centre

Within town centres a wide range of complimentary uses can help to support the vitality of town centres, including residential, employment, office, commercial, leisure, healthcare and education. Residential development in particular plays an important part in supporting the vitality of town centres. Residential development gives communities easy access to a range of services, including being located in close proximity to transport hubs, local shops and facilities. This principle is supported at both a national and regional level, within the NPPF, National Planning Policy Guidance and Places for Everyone Joint Plan.

In response to the challenges facing town centres and high streets, expanding the resident population in these central location is recognised as being increase important in helping to generate the necessary footfall and vibrancy to sustain facilities and enhance the attractiveness of town centres. An increase in the number of residents living in town centre locations also enables new residents to take advantage of transport connections, whilst prioritising brownfield land for development.







1// Bury Housing Strategy Needs Assessment
2// Pyramid Park Town Centre Masterplan Housing Illustration
3// Housing Policy Target illustration

Housing Need and Affordability

Ongoing economic and population growth will continue to drive the short-term need for new, high-quality, affordable accommodation across Greater Manchester and within Bury. The delivery of new homes ensures that supply keeps up with demand and thus supports local businesses in attracting, and retaining, younger talent. The optimisation of town centre locations plays an important role in responding to Greater Manchester's housing delivery, providing a vital component of addressing housing need and under-delivery.

The Greater Manchester Housing Strategy sets out the region's vision for new homes and seeks to ensure that the right homes are delivered in the right places, providing an appropriate number and mix of new homes to address future need. This includes the ambition to deliver 50,000 additional affordable homes across Greater Manchester by 2037. A key objective of PfE is the need to meet the Local Housing Need, which equate to just over 175,000 homes over the plan period (2022-2039). Based on PfE between 2022 and 2039, the borough of Bury needs to create an additional 7,678 homes, equivalent to building 452 homes per year.

Population Growth and Future Housing Need

In 2020, there were 191,841 people living in over 81,000 homes in Bury MBC. The borough's population is projected to increase to 198,241 by 2030 and to 202,568 by 2037, an overall increase of 5.6% residents. The population aged 65 years and over is expected to increase disproportionately quickly, from 35,225 to 43,635 a rise of 8,410 or almost 24% over the same period. This population increase equates to 5,109 new households over the period from 2020-2031 with many more households expected in the older age groups. The projections also show a decline in the number of people between the ages of 20 and 54 living in the borough.

Population and household projections suggest that the population within the Borough is ageing and is not retaining or attracting working age residents. This therefore presents a need to drive an improved balance between younger and older residents in Bury, which will support the creation of mixed, sustainable communities.

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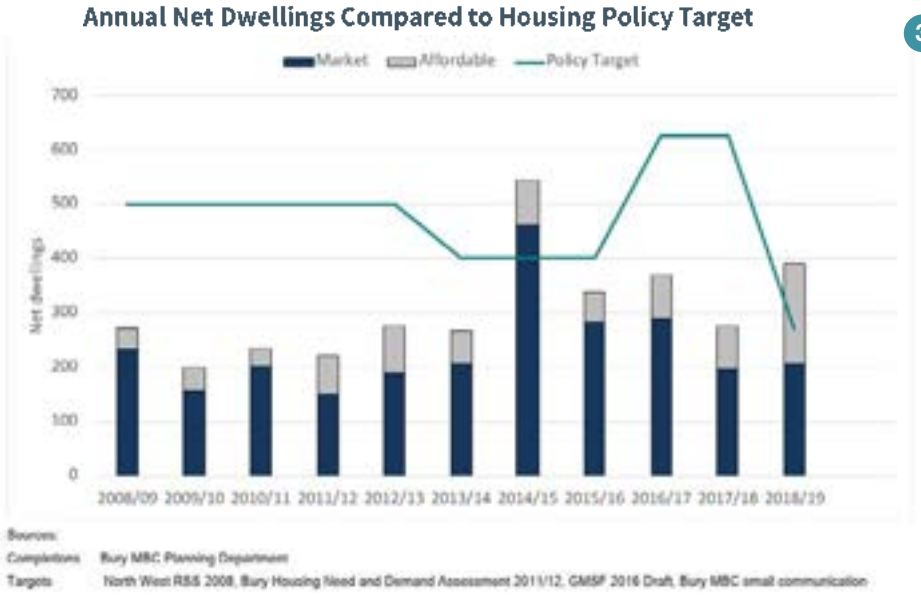


Source: Arc4, August 2020 - Bury Housing Needs and Demand Assessment; Bury Council 2021 Bury Housing Strategy

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Bury's Housing Delivery

There remains a strong demand in the residential market in Bury over recent years. Across Greater Manchester, new housebuilding continues to recover from the reduction in delivery following the 2008 Global Financial Crisis, with 12,443 net additional dwellings built in the PfE Plan Area in 2019/20 – a net increase of 15% compared to 2018/19 delivery.

However, Bury has continued to struggle to bounce back from the 2008 Financial Crisis, and supply is behind the identified need. Currently, the Borough of Bury's Local Housing Need is 591 dwellings per year, however in the latest Bury Authority Monitoring Report (19/20), the Borough recorded 200 net conversions or completions – significantly below this target. The Bury Economic Performance Report (2020) highlights that as the Borough becomes a more popular place to live for those outside the Borough, affordability further confounds the availability of suitable housing for existing residents.

Bury is one of the less affordable boroughs of Greater Manchester, with slightly higher than average house prices when compared to the North West regionally. Whilst PfE includes housing allocations within the Borough of Bury which may improve these supply issues, this housing is largely located in the Northern Gateway and Elton Reservoir strategic allocations, which seek to create contained, sustainable communities. The Bury Local Plan, which is currently being prepared, proposes to allocate further sites for housing development – however, this is not expected until the adoption of the PfE Plan.

There is an opportunity for the Mill Gate to deliver new homes, optimising the use of brownfield land, to support the delivery of a vibrant, mixed use town centre hub. The opportunity supports the long term vitality of the town centre by increasing activity and footfall, whilst responding to the needs of existing and future residents, including local housing pressure.



Asscher House - The Rock

Affordability

The Borough is facing significant housing demand and affordability challenges due to a combination of natural population growth and net internal migration from other parts of Greater Manchester and England. Over the last decade, house prices in Bury have increased by 57%, which is higher than the national average of 50%. The acute pressures are particularly evident in Prestwich and suburbs around Radcliffe, where house prices have risen by 100% in the last 5 years.

The strong housing market and limited supply of new high quality housing in Bury causes affordability challenges to residents, particularly among the young-first time buyers. A lack of affordability within the housing market has also contributed to fractious rental market, as supply is struggling to meet demand and forcing monthly rents up – further confounding access to high quality housing across the Borough. This limits the town's potential as a place of choice for people considering moving to the area, which also impacts the ability for the Borough to attract and retain skilled young people.

The Borough also features high-levels of outward migration, with many potential young professionals moving to other parts of Greater Manchester working in often higher-paid and more skilled jobs in Manchester and Salford.

There is an opportunity through future developments across the Mill Gate estate to contribute to a more balanced housing market for the town centre by delivering a mix of housing of diverse types and tenures, which are high-quality, futureproofed and affordable. Opportunities for tenures which are more characteristically seen in city centres, such as Build to Rent, should also be explored to cater for young professionals who may be struggling to find housing in the town centre.

Mixed tenure multi-generational housing presents the opportunity to positively contribute towards sustainable and inclusive communities. It promotes social and economic diversity by providing homes for people of different income levels and backgrounds. This provision plays an important role in reducing social segregation and promoting social mobility, interaction and cohesion. It is essential for creating communities that are accessible to all, regardless of their position or situation. Prioritising mixed tenure, multi-generational housing therefore supports the long terms sustainability of towns by creating an inclusive place that allows diverse, vibrant communities to thrive.









Sustainable Development

The purpose of the planning system, in line with legislation and the NPPF is to contribute to the achievement of sustainable development and to ensure a presumption in favour of sustainable development in plan making and decision making. Sustainable development seeks to ensure that current needs are met without compromising the ability of future generations to meet their needs. Sustainable development is underpinned by the delivery of economic, social and environmental benefits together, in a mutual way – this is key in achieving the UN's sustainable development goals.

Greater Manchester's PfE supports the overarching goal of sustainable development. PfE emphasises includes promoting the protection and enhancement of key environmental resources, adhering to the waste hierarchy and reducing waste generation, adopting sustainable construction techniques, addressing and adapting to climate change, and reducing carbon emissions to meet Greater Manchester 2038 target for carbon neutrality. PfE also promotes high levels of economic growth that benefits all residents and delivering sustainable development that minimises travel and reliance on private vehicle usage.

Climate Change and Carbon Neutrality

Greater Manchester Combined Authority's (GMCA) 5 year Environment Plan, launched in 2019, sets out the city region's strategy for progressing to carbon neutrality by 2038. The 5-year Environment Plan sets out ambitions for Greater Manchester to be clean, carbon neutral, climate resilient city region with a thriving natural environment and circular net zero waste economy.

In supporting Greater Manchester's ambitions, climate change is a golden thread throughout PfE, recognising that a combination of actions are required to suitably address and adapt to climate change.

A number of carbon and energy targets and expectations for new development support the 2038 carbon neutrality ambitions.

Bury Council declared a Climate Emergency in 2019, in response to the undeniable scientific evidence that the actions of humans are having a negative impact on the planet. In response, Bury Council produced their Climate Action Strategy (2021) and Action Plan (2023).

The Bury Climate Action Strategy (2021) provides information on climate change science, background, place-setting, details the key action areas and the thinking behind Bury's decisions.

The Bury Climate Action Plan (2023) shows Bury's progress towards being carbon neutral by 2038 and where more work is required. The action plan is updated every year to account for new issues, ideas, and technology.

Bury's Climate Action March 2023 update shows that Bury as a borough is moving in the right direction with a lot of the metrics of success, including Carbon Emissions, Air Quality, Energy Consumption and electric vehicle ownership. To date, Bury has achieved a 63% reduction in greenhouse gas emissions (compared to 2008/2009 levels).

The scale of the regeneration opportunity at the Mill Gate presents a significant need to support Greater Manchester and Bury's net zero carbon objectives through the delivery of low carbon development throughout all stages of delivery and all phases of the Masterplan. The JV is developing a sustainability strategy for the Mill Gate that will apply to all new and existing buildings to ensure that they meet or exceed all local and national targets.





Natural Environment and Well-Being

The natural environment presents a valuable opportunity to improve health and well-being outcomes for residents while reducing reliance on public sector services. Green linkages can be an effective means of enhancing access to green spaces, particularly in areas where the existing urban form does not easily allow for the creation of new large green spaces. Creating permeable, safe, and visually appealing routes within urban areas, can also facilitate ease of access and extend off-road routes for recreational and health benefits.

There is potential for improving connections to the natural environment, expanding the provision of green routes and improving the quality of existing routes to enhance the local community's ability to access the natural environment and increase green infrastructure levels. This can be achieved by enhancing the public realm, preserving and creating new natural habitats, and promoting sustainable transport options such as walking and cycling. By prioritising the natural environment in planning and decision-making, we can create healthier, more sustainable communities that are connected to nature and promote well-being for all residents.

The NPPF and Places for Everyone Joint Plan recognises the importance of the natural environment in promoting inclusive growth by contributing to the creation of sustainable and healthy communities. This includes the protection and enhancement of the natural environment, such as green spaces, biodiversity, and green infrastructure. This is further evidenced by the introduction of biodiversity net gain (BNG) targets, outlined within the Environment Act 2021.

There is an opportunity for the Mill Gate to enhance connections within the Framework Area and the wider town centre to improve access to the natural environment and deliver additional green infrastructure by exploring opportunities to introduce additional greening within the public realm. The public realm across the Framework area therefore presents an important part of delivering health and well-being benefits to the local community.







Regional and Local Socio-Economic Disparity

Inclusive growth can be defined as economic growth that is distributed fairly across society and creates opportunities for all. It is a vital aspect of Greater Manchester's PfE Plan and the Bury 2030 "Let's Do It!" strategy.

PfE recognises the city region's ambition to deliver more inclusive growth to benefit all boroughs and in doing so recognising that Greater Manchester is not fully realising the potential and possibilities of its key assets. This includes identifying the need for further improvements in transport connections and skills development to ensure that everyone can contribute to and share in the benefits of economic activity, helping to deliver genuinely inclusive growth.

In light of identified challenges facing Greater Manchester, PfE recognises the need for the plan to:

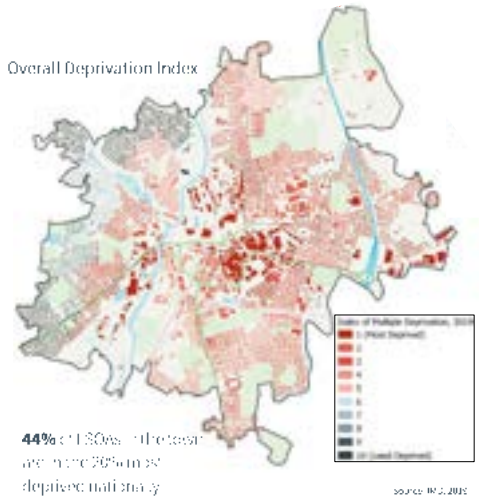
- *"Deliver high levels of economic growth to support the prosperity of Greater Manchester, whilst ensuring that all parts of our boroughs and all our residents share in the benefits;*
- *Deliver the highest possible quality of life for all our residents, and address existing problems such as health disparities and air quality that currently detract from it."*

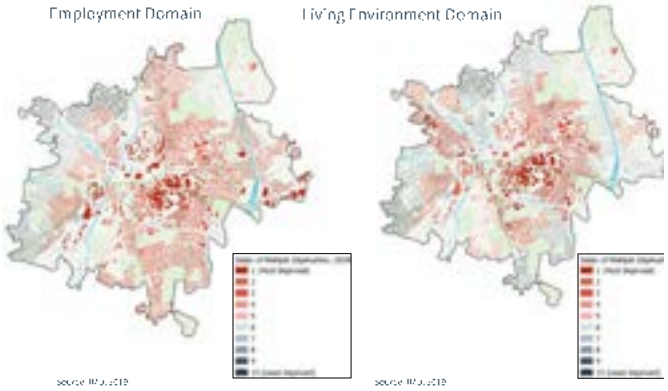
Bury's 2030 Let's Do It! Strategy, set's out the vision for Bury to stand out as a place that is achieving faster economic growth than the national average, with lower than national average levels of deprivation.

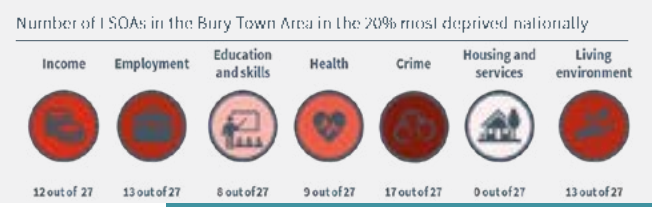
There are a range of existing socio-economic challenges for residents of Bury; including the lack of availability of high-quality, affordable homes, lack of training opportunities and pockets of deeply entrenched deprivation within close proximity to the town centre.

Deprivation

The Borough of Bury ranks as the 115th most deprived borough nationally (out of 317 local authority areas in England). Given the Borough as a whole is a mix of urban and rural, there are diverse levels of prosperity and deprivation, with areas of relatively low deprivation located alongside some of the most deprived areas in the country. This is most notable within the Borough around Bury, Radcliffe and Prestwich. Within the town of Bury levels of deprivation are high with 44% of lower super output areas (LSOAs) within the top 20% most deprived nationally, when compared to just over a fifth (21%) across the borough. In Bury some of the most pressing challenges are in crime, health and employment IMD domains.







Health and Well-Being

The borough's demography is characterised by a diverse population, with younger individuals concentrated around the town centres and an older demographic located in the rural parts in the north of the Borough. However, the ageing population presents challenges for Bury by limiting the supply of labour in the working age population and increasing the demand for health and social care services.

As the borough's population continues to age, further challenges related to health and wellbeing are expected to arise. Residents who are already in some of the most deprived parts of the borough are likely to face some significant health challenges. Although the average life expectancy across the borough is 78 for men and 82 for women, which is below the national rates of 79 and 83 for men and women respectively, there are significant disparities across the borough.

Whilst on average Bury residents live healthier lives compared to Greater Manchester and North West averages, borough-level analysis hides the significant variations in life expectancy across the Borough. For example, a male in a more deprived area of Bury, such as East Bury Ward (which includes Bury Town Centre) has a life expectancy of up to 75, whilst a male in some areas in the southern suburbs of the borough has a life expectancy of up to an additional 8 years (such as wards of Unsworth and Sedgley).

There is also recognition that the health and wellbeing of Bury residents can act as a barrier into employment with 31% of economically inactive Bury residents classified as being long term sick.

Within the East Bury Ward the prevalence of childhood obesity and overweight is higher than both the borough wide and England levels. In East Bury 44.1% of Year 6 children (aged 10-11 years) are considered overweight (including obesity), when compared to borough and national levels of 36.1% and 35.8%. This variation further reinforces the health inequalities within the borough.

The regeneration of Mill Gate and the town centre provides an opportunity to address the high levels of deprivation within the town centre and deliver improved health and wellbeing outcomes to address inequalities within the borough. There is a significant opportunity and need to ensure that proposals provide clear social and economic value and benefits to local residents and businesses.

31% of those who are economically inactive in the Borough are long term sick

62.8 Healthy Life Expectancy of Bury compared with 61.1 in GM and 62 in the North West

81% in 'good or very good health' in the Borough

35.2% Prevalence of childhood obesity (year 6) compared to 21.6% in England









Sustainable Mixed Communities

Sustainable mixed communities are essential for delivering inclusive growth in town centre regeneration. The promotion of sustainable, inclusive and mixed communities is established within the NPPF. The NPPF recognises the importance of providing a range of housing types and tenures including affordable housing, as well encouraging the provision of a range of community facilities, such as schools, healthcare facilities, and shops, to support the needs of the local community.

Greater Manchester's Places for Everyone Plan sets out a vision for the future of the city-region, with a focus on creating sustainable, inclusive, and connected communities. The plan recognises the importance of creating mixed-use development, which combines residential, commercial, and community uses in the same area. This approach can help to create vibrant and diverse communities that are well-connected and offer a range of amenities and services.

Promoting and creating mixed communities can ensure that everyone has access to the same opportunities, regardless of their income, ethnicity, or social background. This can help to reduce inequality and promote social mobility, which is essential for creating a fairer and more prosperous society.

Sustainable mixed communities can also help to create more resilient town centres. By bringing together people from different backgrounds and with different skills and experiences, this creates a more diverse and dynamic community that is better able to adapt to changing circumstances. This can help to create a more vibrant and resilient local economy, which is better able to withstand economic shocks and challenges. Promoting sustainable mixed communities can seek to create a more inclusive, resilient, and prosperous town centre that benefits everyone in the community.





Meaningful Community Participation and Social Outcomes

Meaningful Community Participation

Bury Council's "Let's Do It" strategy recognises the importance of community engagement and community participation in shaping the future of the borough. The strategy recognises that engagement is not just about informing people about decisions that have already been made, but emphasises the need to involve local communities in decision-making processes, to ensure that their views and aspirations are taken into account.

The "Let's Do It" strategy also highlights the need to adopt a range of engagement methods to reach different groups in the community, including online engagement tools, social media, and face-to-face engagement events. This approach can help to ensure that a diverse range of voices are heard and that everyone has the opportunity to participate in the decision-making process. It sets out a number of principles for meaningful engagement, including the need to be transparent, accessible, and inclusive. This includes providing clear and concise information by being open and honest about the decision-making process and by demonstrating a commitment to listening to and acting on the views of the local community. Meaningful community participation is crucial for delivering a successful regeneration programme. Involving local communities ensures their needs are met, builds trust and support, and creates more inclusive and connected communities that can thrive.

The regeneration of the Mill Gate seeks to ensure that the needs and views of the local community are heard. The JV recognises the importance of working with the local community and stakeholders to drive long-lasting, meaningful change and generate social value through meaningful stakeholder engagement, and community-focused contributions.

Social Impact and Community Outcomes

To deliver sustainable regeneration that delivers meaningful socio-economic benefits to the local community, it is crucial for the regeneration of the Mill Gate to cater impact to address the specific needs of the local community.

The regeneration of the Mill Gate will seek to enhance quality of life for local residents and wider social, economic, and environmental benefits. This holistic approach underpins the evolution of the Mill Gate by supporting a prosperous local community and town centre that is resilient to change.

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The regeneration of the Mill Gate will seek to enhance quality of life for local residents and wider social, economic, and environmental benefits. This holistic approach underpins the evolution of the Mill Gate by supporting a prosperous local community and town centre that is resilient to change.



The Rock Place

1// Mill Gate Mall
2// Mill Gate Entrance from The Rock

Future Investment and Opportunity

Within the context of this Framework and Bury, it means delivering a framework which enables the benefits of regeneration to be felt by all residents of Bury. Future investment in the Mill Gate as a mixed-use town centre hub presents an opportunity to embed inclusive growth principles into the design, delivery and long term operational strategy of each phase. The Framework should serve as the starting point to support opportunities to increase access to homes, education and skills training, variety of employment, social infrastructure, as well as facilities and infrastructure that supports health and well-being.



1



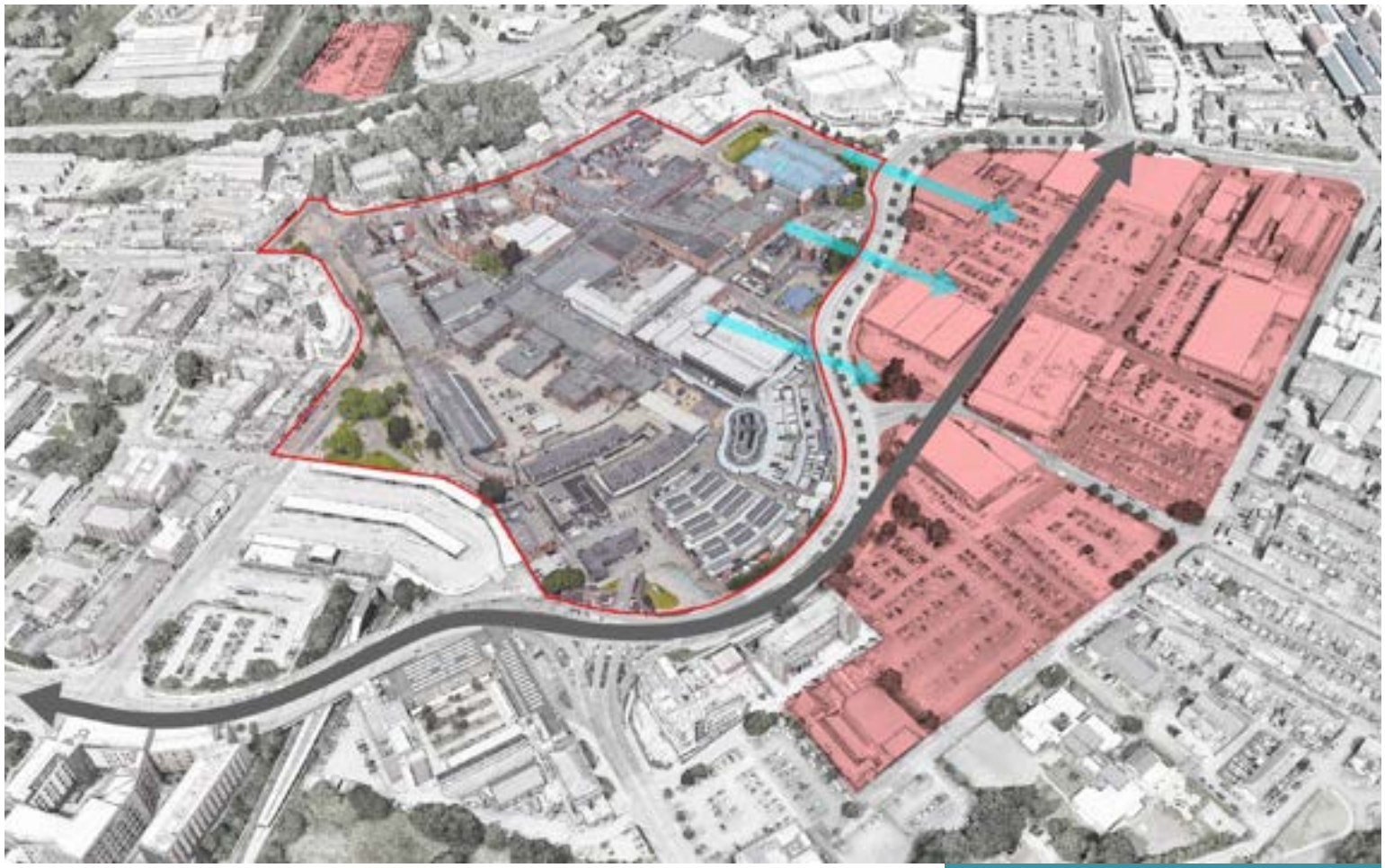
2

Catalyst for Future Opportunities

Future strategic considerations and opportunities outside of the Framework area will be drawn out and supported by the successful delivering of the Framework's regeneration programme – supporting potential longer term major infrastructure, funding and land assembly requirements.

The regeneration of the Mill Gate is likely to act as a catalyst for the following future strategic opportunities:

- Reprofiling / de-engineering of Angouleme Way
- Land to the southeast (existing surface level car park for Bury Market)
- Angouleme Retail Park (and car park)
- Connect to local residential communities (including those to the southeast)



Bury Illustrative Wider Opportunities

8.3 Appendix 04: Landscape



Introduction

Integral to the sustainable future of Bury Town Centre is the creation of welcoming and functional public realm that supports the objectives of the Mill Gate Strategic Regeneration Framework (SRF).

In order for Bury to become an aspirational place where people choose to live, work and play, its outdoor environment must:

- Be inspirational and of the place.
- Practically and aesthetically support existing and proposed businesses.
- Include a network of streets and spaces that are easy to navigate.
- Offer a varied selection of linked spaces, each of which has a defined purpose.
- Relate to its context, whether that be
- Be greener, both in the interest of visual amenity and biodiversity.
- Offer opportunity for people to engage with nature.
- Provide infrastructure to promote community health and well being.

This document uses an Illustrative Landscape Masterplan to demonstrate how this may be achieved.

Objectives of the Landscape Masterplan



Objectives of the landscape masterplan

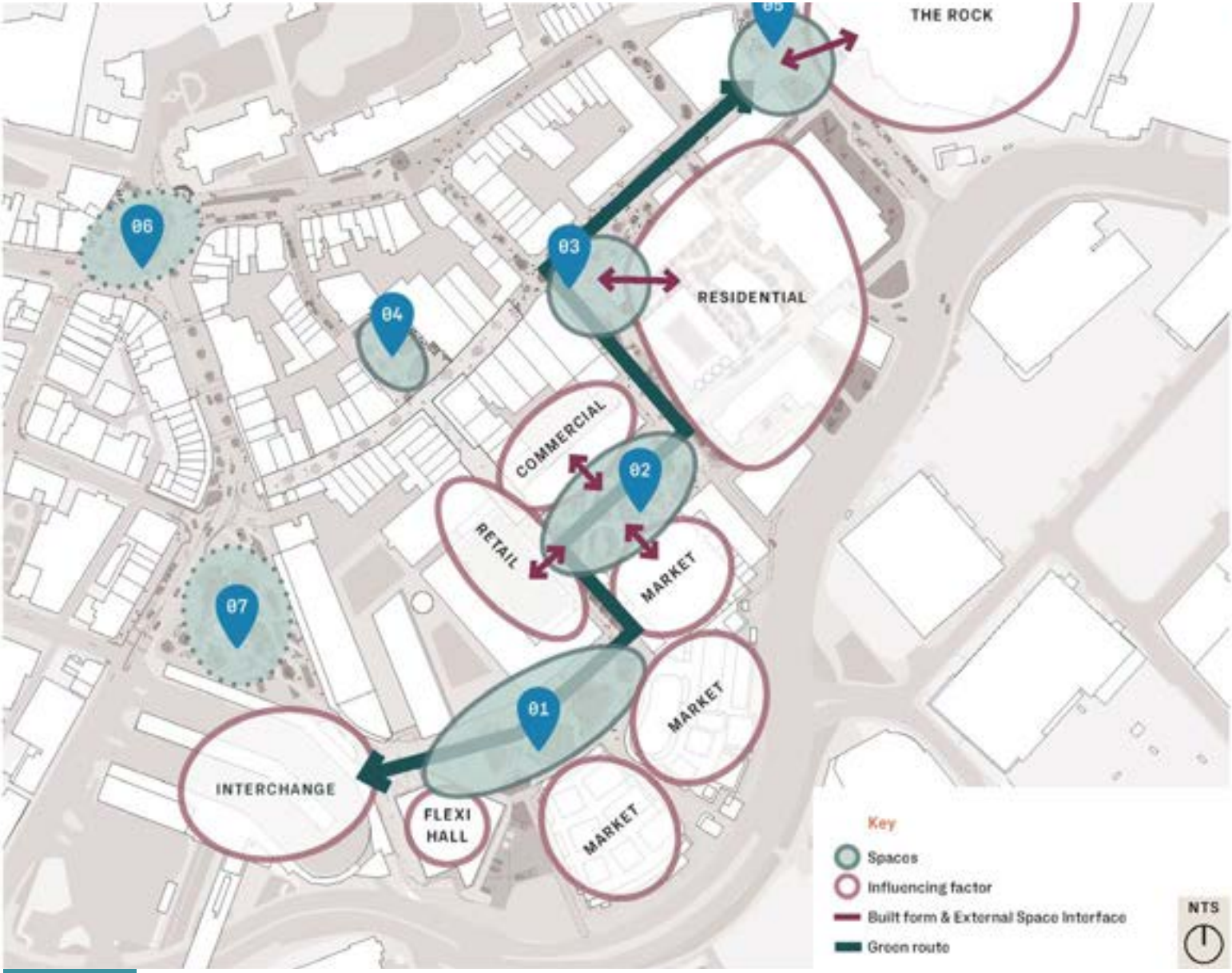
Improvements to public realm through the SRF seek to:

- Stitch together existing and new built form to make the Mill Gate Shopping Centre well connected by high quality public realm.
- Create places that people want to visit as part of a day out to Bury.
- Make green, residential streets in which to live and play.
- Make a place that's easy to navigate.
- Put pedestrians first.
- Establish contemporary streets as a setting for business and leisure.
- Increase biodiversity through new green and blue infrastructure.
- Create flexible spaces to support the changing dynamics of the indoor and outdoor market.
- Make green, residential streets in which to live and play.
- Support multi modal travel by creating a welcoming arrival for those on foot or using public transport.
- Subtly integrate service routes into the street scene.

Making it relevant to Bury

- Locate vibrant spaces close to the market.
- Take design cues from the town's industrial and cultural heritage.
- Use the interchange, Mill Gate and The Rock as landmarks that new public realm must connect.
- Consider strategic connectivity with areas beyond Angouleme Way.

A Network of Connected Public Realm



A network of connected public realm

Alongside rationalised streets, a series of new spaces will enhance the living landscape and unlock connectivity and permeability for visitors thus making Bury a more welcoming a stimulating place to live, work and visit. Anchored on the concept of a green spine, new public realm stitches together the interface between existing and proposed built form, strategically connecting the Mill Gate with the transport interchange and The Rock. This re-imagining of the town centre will see the creation of new public spaces.

- 01) Interchange: The first impression when arriving by public transport, a flexible setting for the market and new Flexi Hall.
- 02) Central Market Park: A new central greenspace embraced by a new market facade, commercial and retail development.
- 03) Mill Gate East: The confluence of key pedestrian links from the retail areas of The Mill Gate and The Rock, overlooked by residential neighbours.
- 04) Mill Gate North: A pocket of green as a gateway to The Mill Gate, in proximity to the conservation area.
- 05) The Rock: A transitional space that links the proposed green spine to shopping streets of The Rock.

Outside the SRF boundary, the illustrative masterplan acknowledges areas of influence including:

- 06) Peel Square: A gateway into Bury from the north west, set within the conservation area.
- 07) Kay Gardens: Long established civic gardens with an important interface with the transport interchange and the Mill Gate Shopping Centre.

Public Realm Character Areas



Public realm character areas

To make streets and spaces relevant to Bury, they must respond to the place in which they are located. This means looking for characteristics that relate to elements such as land use, architecture and the scale of built form and urban grain.

Having established the elements that contribute to Bury's existing local character, a strategy for the future can be developed whereby new streets and spaces are designed to embrace similar principles, resulting in a rich sense of place. This will give the town centre identity and contribute to placemaking and help users navigate the place.

This diagram assigns public realm character areas to the SRF masterplan.

Street Hierarchy - Plan



Street Hierarchy

To make the future street network operate efficiently, a hierarchy is applied to the SRF masterplan. This responds to the way streets are used, informed by the adjoining use, neighbouring building scale, servicing strategy and emergency vehicle access.

Key

- Pedestrianised
- Pedestrianised with emergency access
- Pedestrianised with managed service access
- Low traffic
- Regular traffic

Street Design Principles - Matrix

Street/space typology	Typical Characteristics	Character Area				
		Historic & Civic	Residential	Transport/Market/ Events	Traditional retail/high street	Leisure retail
Pedestrianised	• Vehicle free • Narrow • Established • Small scale (4-8m wide)				• Covered • Surface materials to complement adjoining external streets.	
Pedestrianised with emergency access	• Vehicles limited to emergency access. • Vehicular routes undefined. • Includes large public spaces, often connected. • Small to medium scale.	• Flush surfaces • Stone materials to reflect heritage setting. • Greening of existing squares for biodiversity and sustainable drainage. • Evolution of established spaces to reduce dominance of vehicles.	• Flush surfaces • Materials to complement new built form. • Defensible space outside homes. • Opportunity for permeable paving on new streets. • Greening via in ground tree planting and green gap paving.	• Flush surfaces • Materials to complement new built form and suited to street cleansing routine. • At grade crossings at node with regular traffic street. • Greening via street trees, in ground or containerised.	• Flush surfaces • Trees, planted in ground and containerised. • Rain gardens where space permits.	• Flush surfaces. • Greening of established public spaces as softer gateways from the east. • Materials to reflect character of The Rock.
Pedestrianised with managed service access	• Vehicular access restricted to specific times. • Vehicular route defined. • Medium scale	• Remodelling of existing routes to reduce dominance of vehicles. • Upstand to highway edge. • Min 3m wide vehicular corridor. • Stone materials to reflect heritage setting. • Greening through street trees.	• Flush surfaces • Min 3m wide vehicular corridor. • Defensible space outside homes. • Opportunity for permeable paving on new streets. • Green corridors including rain gardens and street trees. • Containerised tree planting where utilities infrastructure is a constraint.	• Upstand to highway edge. • Definition of use through ground plane.	• Flush surfaces • Min 3m wide vehicular corridor. • Opportunity for permeable paving on new streets. • Green corridors including rain gardens and street trees. • Containerised tree planting where utilities infrastructure is a constraint.	• Flush surfaces • Min 3m wide vehicular corridor. • Opportunity for permeable paving on new streets. • Green corridors including rain gardens and street trees. • Containerised tree planting where utilities infrastructure is a constraint.

Street Design Principles - Matrix

Street/space typology	Typical Characteristics	Character Area				
		Cultural/Historic	Residential	Transport/Market/ Events	Traditional retail/high street	Leisure retail
Low traffic	• Open to wide range of vehicles including servicing. • May accommodate bus routes • Routes pass through public squares/spaces. • Medium - large scale	• Carriageway defined with upstand to adjoining pedestrian realm. • Stone materials to reflect heritage setting. • Reduce street clutter to ease pedestrian movement. • Increase opportunities for pedestrians to cross roads.				
Regular traffic	• Busy transit routes to edge of town centre. • Regularly crossed by pedestrians. • Medium - large scale		• Highway corridor defined. • Regular crossing points, at grade. • Green corridor, potentially incorporating strategic cycle route. • Incorporates bus stops.	• Highway corridor defined. • Regular crossing points, at grade. • Incorporates bus stops • Potential for strategic cycle route		• Highway corridor defined. • Regular crossing points, at grade. • Incorporates bus stops • Potential for strategic cycle route

Street Design Principles - Pedestrianised

Street/space typology	Typical Characteristics	Character Area				
		Historic & Civic	Residential	Transport/Market/ Events	Traditional retail/high street	Leisure retail
Pedestrianised	• Vehicle free • Narrow • Established • Small scale (4-8m wide)				• Covered • Surface materials to complement adjoining external streets.	







High quality, covered street scene that visually connects with adjoining public realm.



Street Design Principles - Pedestrianised with Emergency Access

Street/space typology	Typical Characteristics	Character Area				
		Historic & Civic	Residential	Transport/Market/ Events	Traditional retail/high street	Leisure retail
Pedestrianised with emergency access	• Vehicles limited to emergency access. • Vehicular routes undefined. • Includes large public spaces, often connected. • Small to medium scale.	• Flush surfaces • Stone materials to reflect heritage setting. • Greening of existing squares for biodiversity and sustainable drainage. • Evolution of established spaces to reduce dominance of vehicles.	• Flush surfaces • Materials to complement new built form. • Defensible space outside homes. • Opportunity for permeable paving on new streets. • Greening via in ground tree planting and green gap paving.	• Flush surfaces • Materials to complement new built form and suited to street cleansing routine. • At grade crossings at node with regular traffic street. • Greening via street trees, in ground or containerised.	• Flush surfaces • Trees, planted in ground and containerised. • Rain gardens where space permits.	• Flush surfaces. • Greening of established public spaces as softer gateways from the east. • Materials to reflect character of The Rock.




Flush surfaces


Defensible space


Flush surfaces


In ground tree planting


Flush surfaces


Materials appropriate to setting


Green residential setting


At grade crossings


Rain gardens


Above ground tree planting

Street Design Principles - Pedestrianised with Managed Emergency Access

Street/space typology	Typical Characteristics	Character Area				
		Historic & Civic	Residential	Transport/Market/ Events	Traditional retail/high street	Leisure retail
Pedestrianised with managed service access	• Vehicular access restricted to specific times. • Vehicular route defined. • Medium scale	• Remodelling of existing routes to reduce dominance of vehicles. • Upstand to highway edge. • Min 3m wide vehicular corridor. • Stone materials to reflect heritage setting. • Greening through street trees.	• Flush surfaces • Min 3m wide vehicular corridor. • Defensible space. • Opportunity for permeable paving on new streets. • Green corridors including rain gardens and street trees. • Containerised tree planting where utilities infrastructure is a constraint.	• Upstand to highway edge. • Definition of use through ground plane.	• Flush surfaces • Min 3m wide vehicular corridor. • Opportunity for permeable paving on new streets. • Green corridors including rain gardens and street trees. • Containerised tree planting where utilities infrastructure is a constraint.	• Flush surfaces • Min 3m wide vehicular corridor. • Opportunity for permeable paving on new streets. • Green corridors including rain gardens and street trees. • Containerised tree planting where utilities infrastructure is a constraint.




Localised remodelling


Green corridors / defensible space


Ground plane definition


Permeable surfaces


Permeable surfaces


Materials to reflect setting


Street greening


Upstand edge to carriageway


Containerised tree planting


Rain gardens

Street Design Principles - Low Traffic

Street/space typology	Typical Characteristics	Character Area				
		Cultural/Historic	Residential	Transport/Market/ Events	Traditional retail/high street	Leisure retail
Low traffic	• Open to wide range of vehicles including servicing. • May accommodate bus routes • Routes pass through public squares/spaces. • Medium - large scale	• Carriageway defined with upstand to adjoining pedestrian realm. • Stone materials to reflect heritage setting. • Reduce street clutter to ease pedestrian movement. • Increase opportunities for pedestrians to cross roads.				





Materials to reflect setting



Upstand edge to carriageway

Street Design Principles - Regular Traffic

Street/space typology	Typical Characteristics	Character Area				
		Cultural/Historic	Residential	Transport/Market/ Events	Traditional retail/high street	Leisure retail
Regular traffic	• Busy transit routes to edge of town centre. • Regularly crossed by pedestrians. • Medium - large scale		• Highway corridor defined. • Regular crossing points, at grade. • Green corridor, potentially incorporating strategic cycle route. • Incorporates bus stops.	• Highway corridor defined. • Regular crossing points, at grade. • Incorporates bus stops • Potential for strategic cycle route		• Highway corridor defined. • Regular crossing points, at grade. • Incorporates bus stops • Potential for strategic cycle route





Green corridor



Highway corridor defined



Strategic cycleway



Green corridor



Crossings at grade



Crossings at grade

The Spaces - Western Arrival



Western Arrival

A public space is created in the south west of the town, between the Flexi Hall, markets and new commercial/residential block and serves as an important arrival for those using the transport interchange, a setting for the outdoor market and green outlook from overlooking residential windows.

Soft landscape is focused centrally within the space to create green edges opposite each of the building facades and avoid major utilities infrastructure. Shapes are organic and respond to forms used as part of the Flexi Hall public realm proposal. This promotes the creation of flexible secondary spaces off the main pedestrian thoroughfares that can be activated in different ways depending on whether it's market day or not. Hard landscape routes are wide enough to accommodate market stalls so that it can easily expand as and when needed.

When the market is closed, pedestrians are buffered from unattractive roller shutters by soft landscape

This aligns with the SRF development principles by:

- Increasing green infrastructure in support of public amenity and biodiversity.
- Providing an enhanced setting for the outdoor market.
- Enhancing the pedestrian experience.
- Supporting accessibility and multi modal travel by welcoming those arriving via the interchange.

The Spaces - Western Arrival



Softening the hard edge



Points of vertical interest



Bespoke furniture to reflect scale of space



Secondary spaces amongst soft landscape



Market spills out amongst landscape



On market day:

- Active facades around all edges of space.
- Pedestrians can utilise core routes but easily step into adjoining, secondary spaces.
- Outdoor market located within an attractive green setting.



On other days:

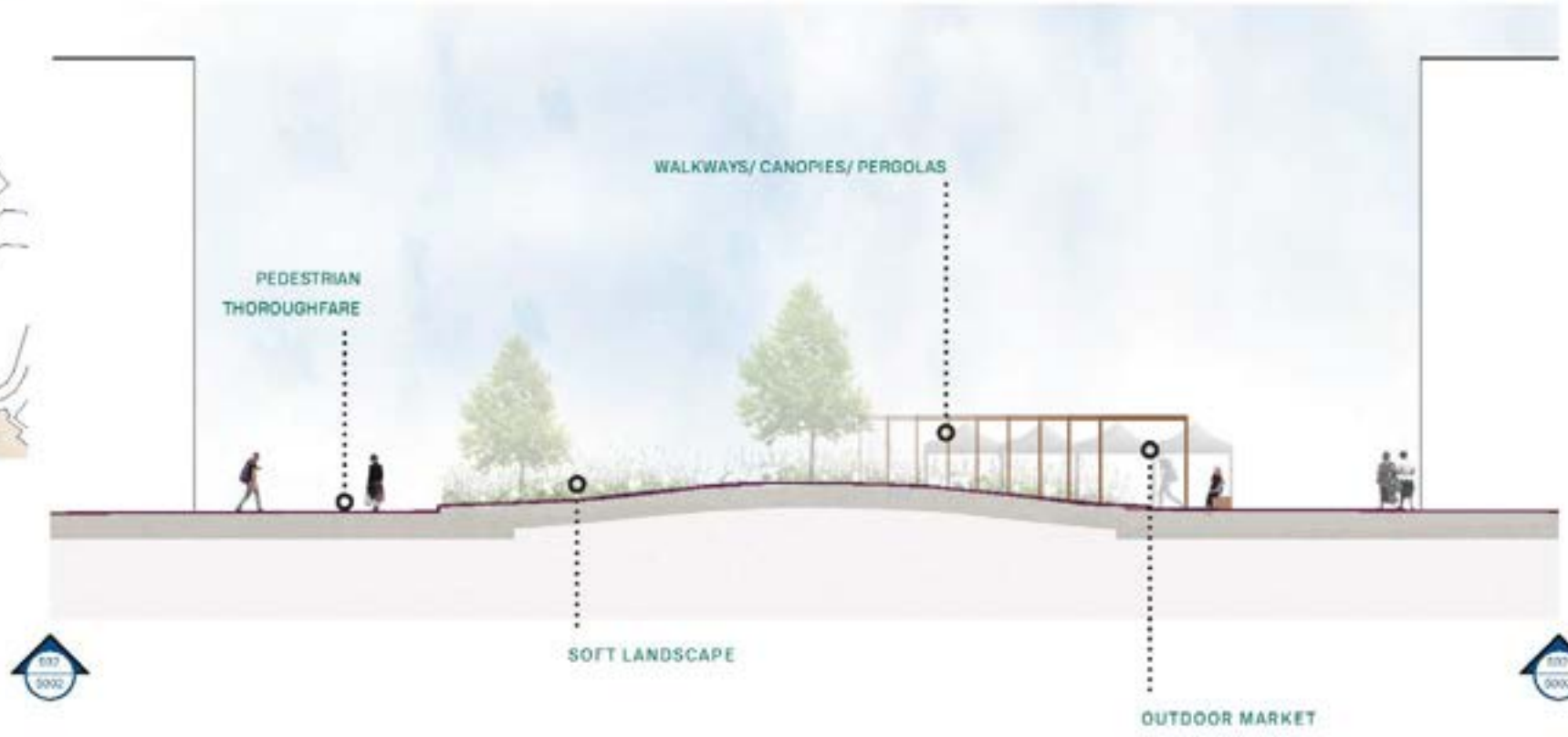
- Roller shutters down meaning that the market presents a less attractive facade.
- Northern edge of space becomes the focus.
- Pedestrians still have secondary spaces, easily connected to the main through routes.
- Soft landscape buffers unattractive shutters.

Key

- Active facade
- Pedestrian routes
- Secondary space

The Spaces - Western Arrival





The Spaces - Market Park



Central Market Park

At the heart of the town centre, a large urban park provides an outdoor destination where people come together to relax, socialise and enjoy vibrant surroundings.

To the south, a new market facade will overlook the park and host outdoor stalls, serving pedestrians passing by on the main green spine. Circular areas of grass and soft landscape will mimic buttonholes, making subtle reference to the town's textile heritage. Green gap paving will enable a living floor that creates a green setting without compromising access for occasional service and blue light vehicles.

Due to the existing market basement, soft landscape and trees may need to be accommodated within raised planters.

In response to the scale of the park, vertical elements will be introduced in the form of trees and feature columns that could support branded banners and/or art.

The floorscape will be animated with paving detail based on sewing stitches and furniture introduced to provide users with ample opportunity to sit and enjoy their surroundings.

A pocket play area could be incorporated to enhance the park for children.

This aligns with the SRF development principles by:

- Increasing green infrastructure in support of public amenity and biodiversity.
- Providing a vibrant front door to the market.
- Locating active frontages on key routes and public space.

The Spaces - Market Park


Modern architecture within a green setting

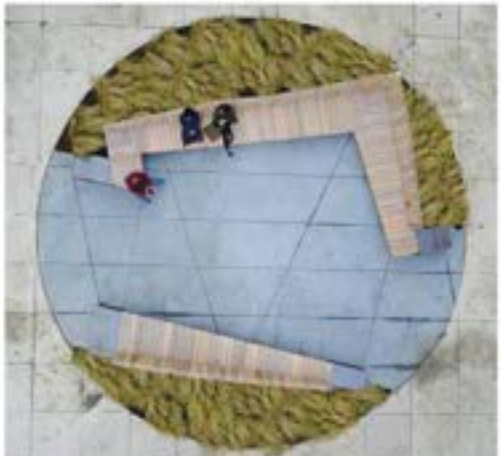

Layered backdrop of soft landscape


Spill out opportunities


Flexibility to sit outside among planting


Bespoke multi-use furniture


Mix fixed and loose furniture


Contemporary pockets of hard and soft landscape (button holes)

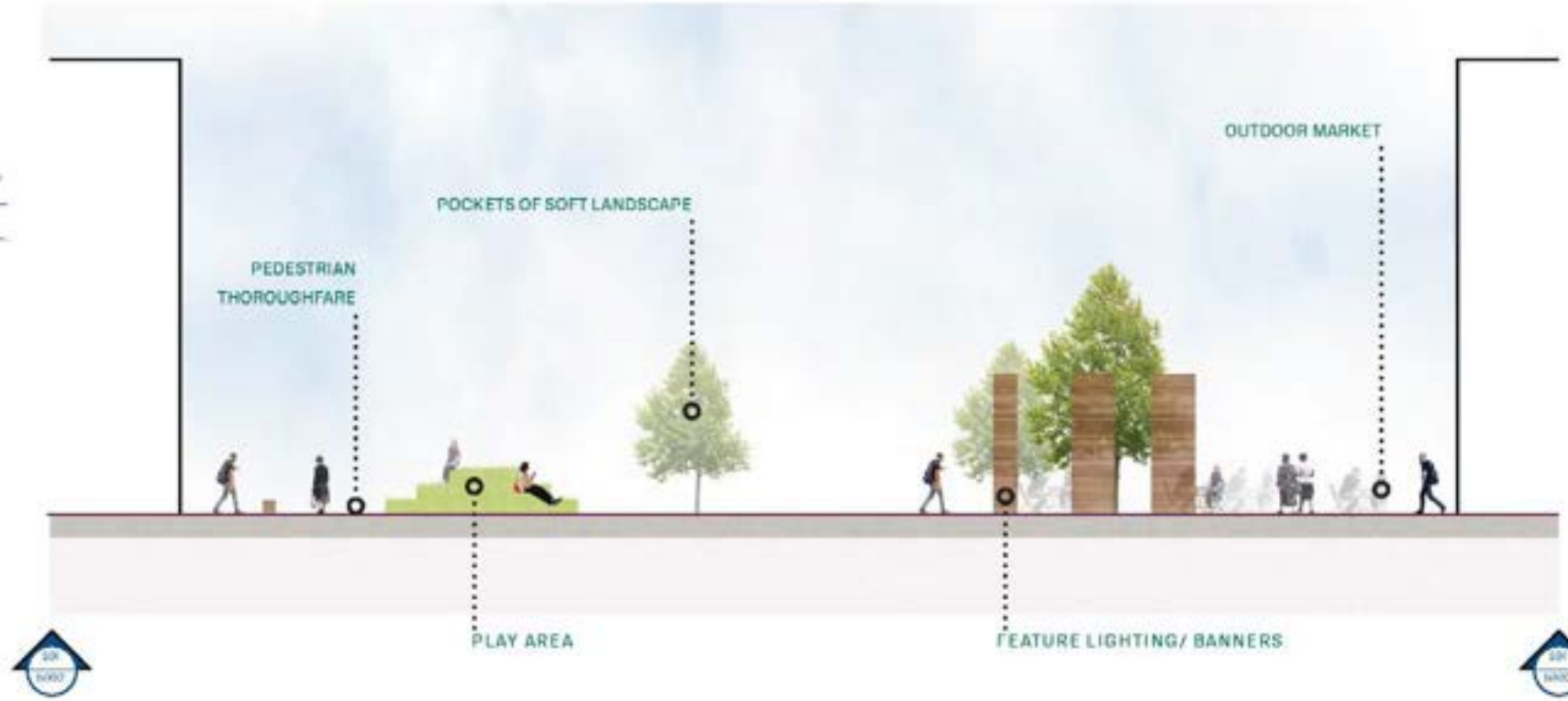

Use modern paving techniques to increase greening


Market stalls wrap around green space


Bespoke multi-use furniture

The Spaces - Market Park





The Spaces - Mill Gate East



Mill Gate East

Located where the green spine meets the eastern entrance to Mill Gate Shopping Centre, this public space also interfaces with new residential use and must therefore serve multiple functions. More specifically it must announce the gateway into Mill Gate, direct pedestrians to and from The Rock, accommodate the linear greening strategy for adjoining streets and provide residents with amenity.

Mill Gate will be identified by a change in the ground plane by introducing bespoke paving detail and pockets of planting within raised planters with integrated seating.

Being located close to retail and residential use, the focus for this space should be play within a green setting. Away from a clear zone for commercial spill out, play equipment and features will be incorporated into the soft landscape and be attractive to look at as well as fun to explore.

The street scene features a central green corridor that will support sustainable surface water drainage, edged by green gap paving to maximise greening of the floorscape and traversed by "bridges" enabling pedestrians to cross from one side of the street to another. A 3m wide route will meander through this corridor, allowing passage by service vehicles without it appearing like a traditional road. A 3m clear zone outside building facades will protect existing utilities and provide opportunity for spill out from ground floor commercial units.

This aligns with the SRF development principles by:

- Providing opportunity for natural play and interaction with the natural environment.
- Delivering a future proofed sustainable drainage strategy

The Spaces - Mill Gate East



Permeable green gap paving extends green corridor



Stepping stones as alternative crossings



Creative, bespoke equipment



Robust, striking landmarks that double as play features



Central green corridor, suitable for SUDS



Regular pedestrian crossing points





Variety of opportunities to climb



Play features set within green corridors



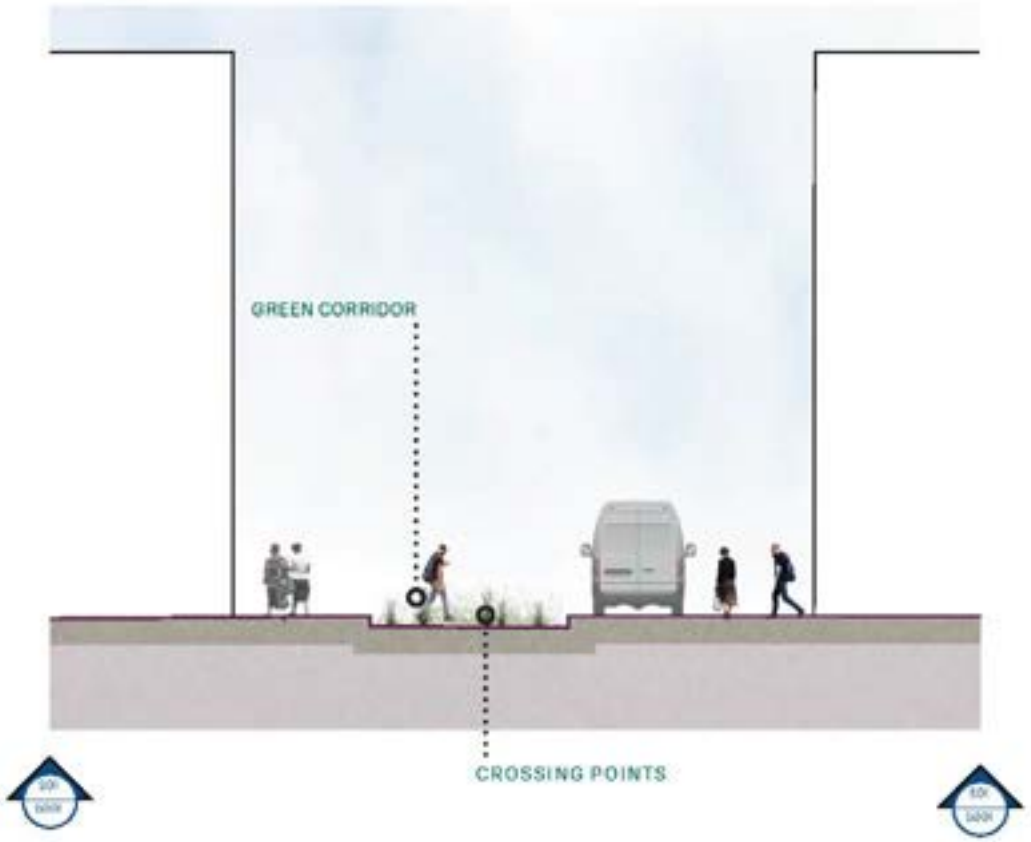
Natural materials



Quirky points of interest set within the soft landscape

The Spaces - Mill Gate East





The Spaces - Residential Area



Residential Area

As part of the mixed used neighbourhood, new homes will be built inside the SRF boundary.

Residential blocks will sit within a network of green streets, just off the town centre's main pedestrian thoroughfares. At ground floor, residents will be able to step out into a semi private zone of defensible space (circa 3m wide) and look onto, a green corridor that runs the length of the street. This corridor could host sustainable drainage and give people regular opportunity to engage with nature. Where it widens outs, the corridor could incorporate informal play.

A central route meanders along the street anticipating only occasional passage by vehicles, therefore creating a safe space for residents to interact and play.

These residential streets also provide pedestrians with an alternative journey to and from the multi storey car park, should they chose to avoid the most direct route from A to B.

This aligns with the SRF development principles by:

- Giving people change to interact with nature.
- Providing resident with green amenity on their doorstep.
- Prioritising the pedestrian without compromising serving regimes.

The Spaces - Residential Area


Meandering routes


Maximise opportunity for greening


Informal planting to edge of defensible space


Woodland understorey as defensible edge to homes


Central route, wide enough for occasional vehicles


Creative use of permeable green gap paving


Living in a green setting

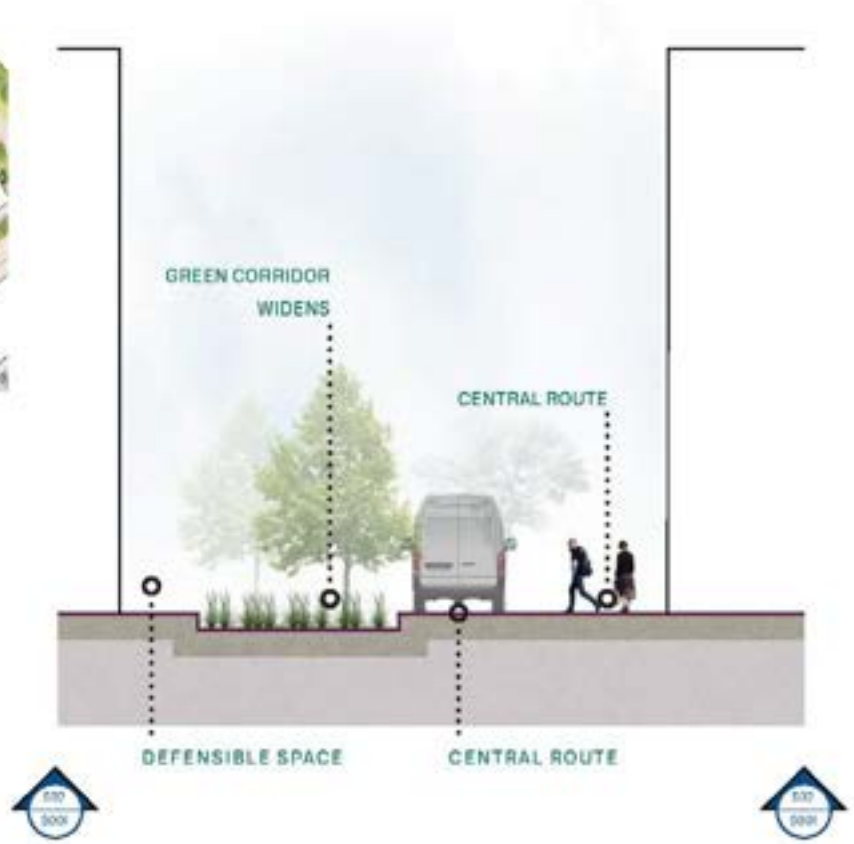

Opportunity for SUDS in residential areas

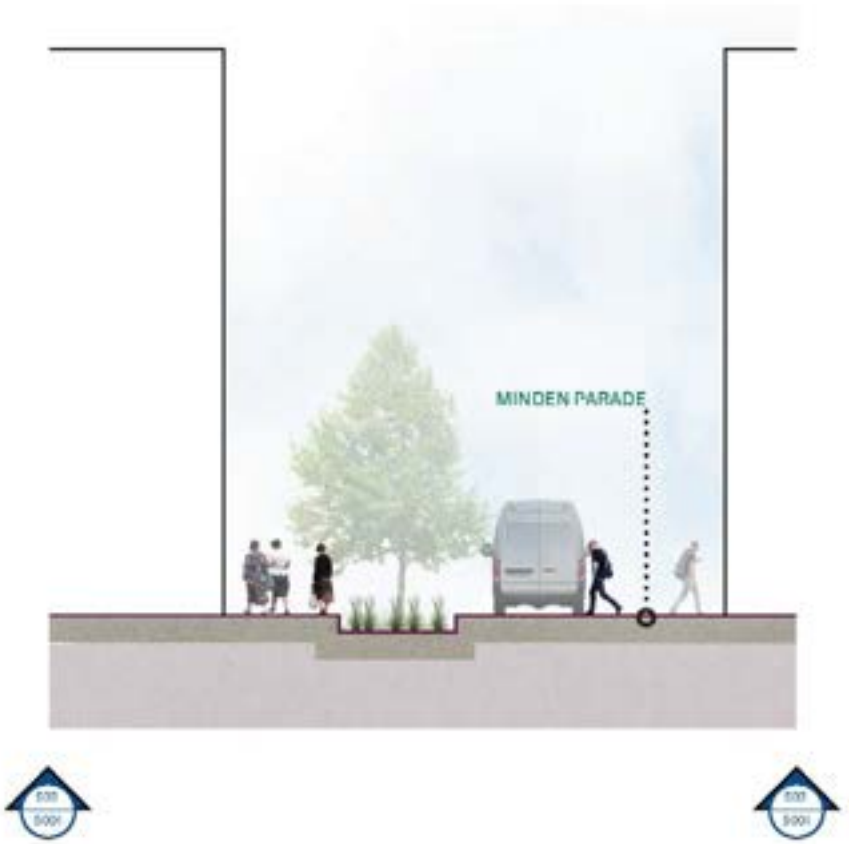

Contemporary style planting


Vertical greening to building facade

The Spaces - Residential Area

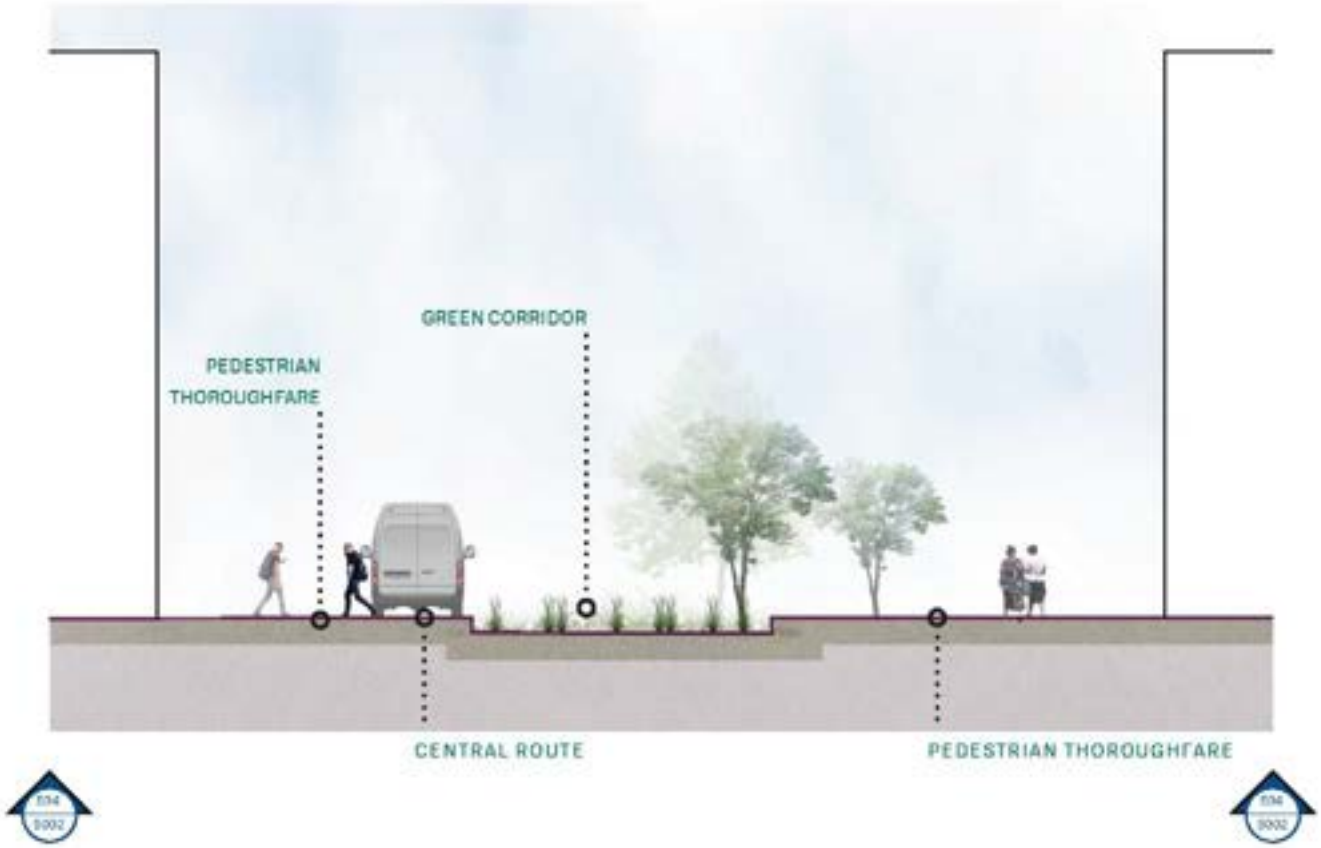




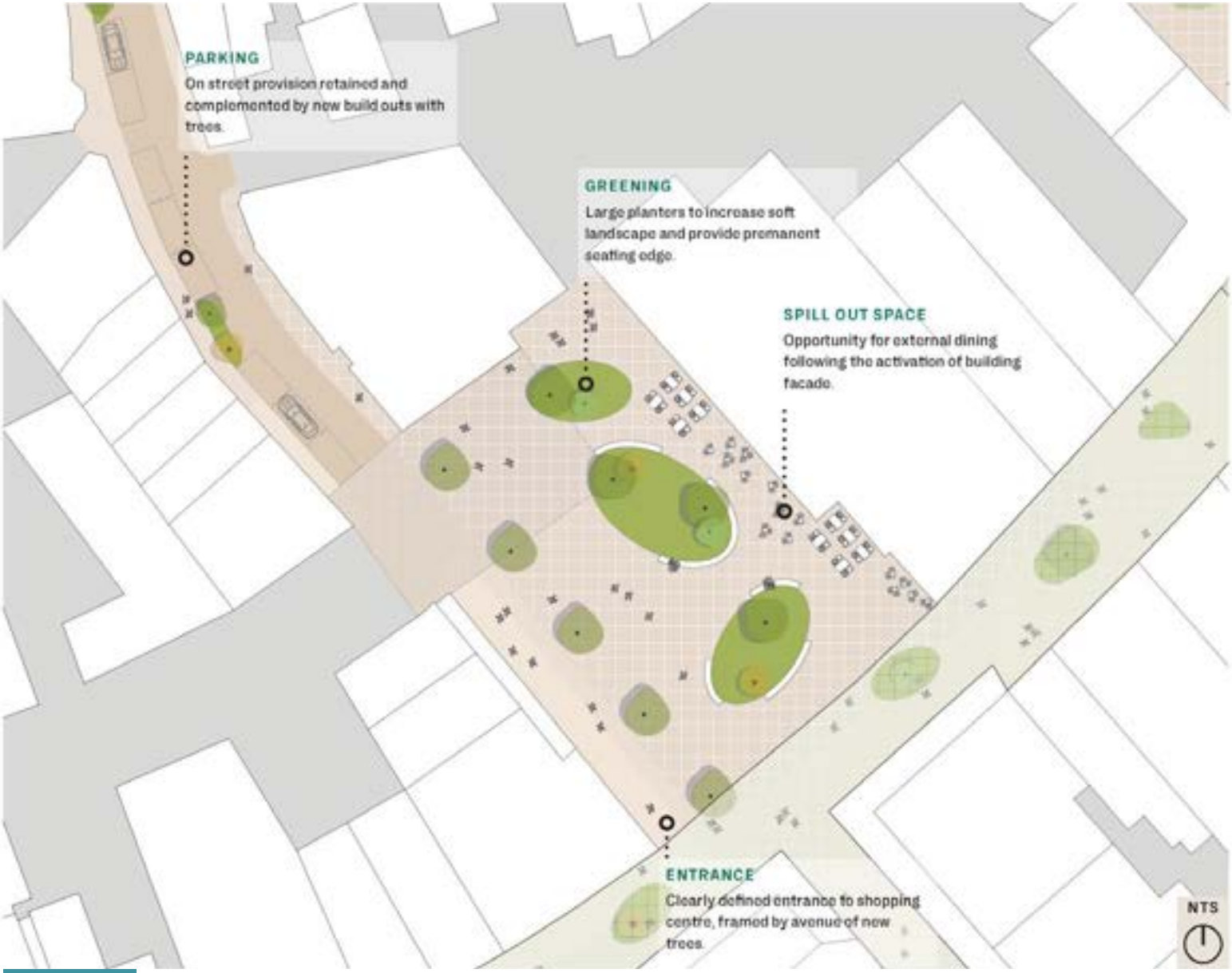


The Spaces - Residential Area





The Spaces - Mill Gate North



Mill Gate North

This space serves as a green gateway into Mill Gate when approaching from the conservation area and provides a pocket of green, away from the main pedestrian thoroughfares. The restructuring of Mill Gate Shopping Centre will see the animation of buildings to the north and greater interaction with the covered mall to the south. It will support spill out from ground floor commercial units but also give people a face to stop and sit, away from the main hustle and bustle of the town centre.

To accommodate new floor levels, the external space will be regraded and existing trees felled to make way for new green infrastructure and a more accessible outdoor environment.

Raised planters with integrated seats will be positioned to create low level enclosure and form smaller spaces within the larger space.

This aligns with the SRF development principles by:

- Creating a square that responds to surrounding uses.
- Activating frontages around a public space.
- Enhancing public realm to create a sense of arrival into Mill Gate Shopping Centre.

The Spaces - Mill Gate North



Textural interest within soft landscape



Combine organic shapes and straight lines



Use hard landscape to create vertical texture

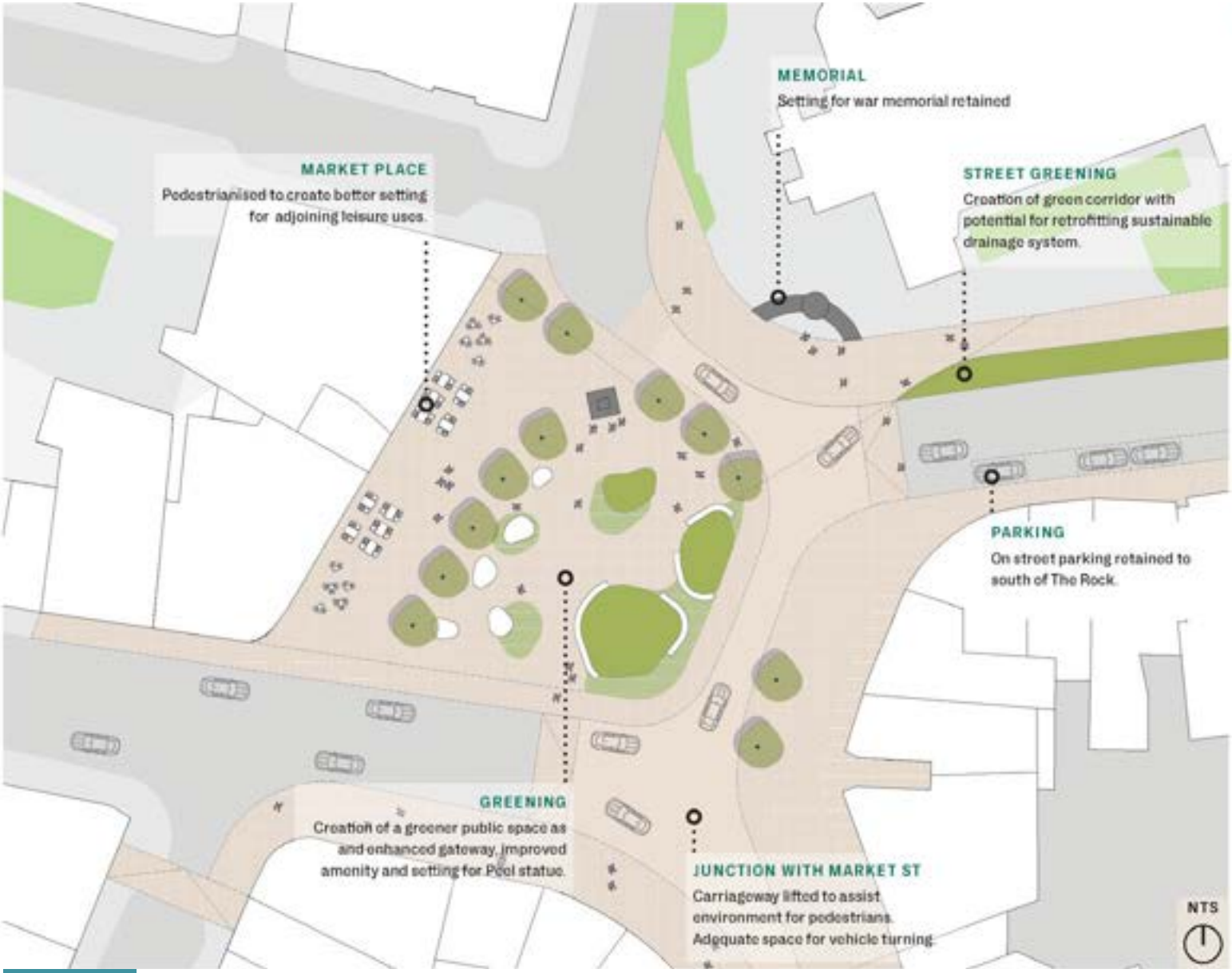


Canopy and under storey layers of green



Raised planters as seating edges

The Spaces - Peel Square



Peel Square

As a gateway from the north west, this space has potential to provide a welcoming arrival and external amenity to buildings that surround it.

By rationalising the street scene and reducing space given over to vehicles, it becomes a more pedestrian friendly environment, respectful of the architectural quality of the conservation area and heritage features that are located within it.

Market Place is removed to create spill out space for the pubs which overlook the square and create opportunity to animate the place with people. Trees are planted to further define secondary space, provide greening and encourage biodiversity at canopy and ground level.

The carriageway is lifted to enable level pedestrian access across the square, with flush kerbs used to delineate the area available to manoeuvre vehicles. Access to The Rock is not restricted but parking bays to the north are reconfigured into a green corridor to improve the setting of the church and create opportunity for the retrofitting of sustainable drainage of surface water.

The Spaces - Peel Square



Greening the edge of public space



Roadside SUDS corridor



Road passing through pedestrian realm



Places to sit and relax

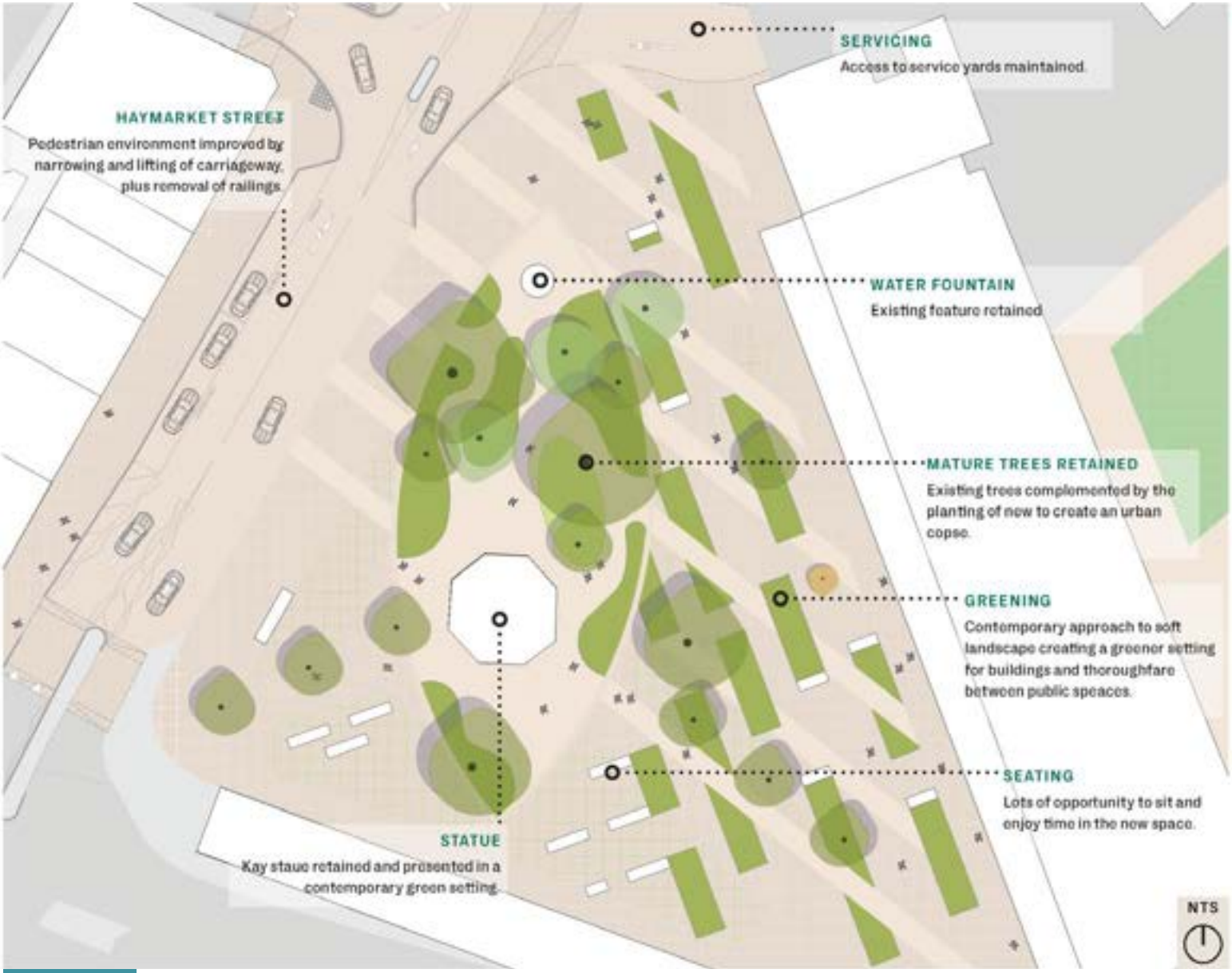


Using furniture to create secondary spaces



Space for retail and leisure spill out

The Spaces - Kay Gardens



Kay Gardens

As one of the town's main public spaces, Kay Gardens is a long established amenity space, home to listed structures and mature trees that give the place solidity and a connection to Bury's industrial heritage. In the context of Mill Gate SRF, the space has potential to become somewhere more in keeping with the demands and aesthetic of a modern town centre. Enhancements are intended to present the John Kay statue in a more contemporary green setting and create a place that offers somewhere to socialise and relax.

The design takes inspiration from the flying shuttle, using a pointed oval shape to form the edge of the statue garden that will be planted with a new palette of shrubs and perennials. Beyond the organic forms of the garden, more rectilinear planting areas will be used to green the space and create an understorey to the canopy of new and retained trees.

The space will be arranged so that pedestrians can easily pass through as part of an onward journey, but also have ample opportunity to sit and stop.

Haymarket will be de-engineered to improve the environment for pedestrians. The carriageway will be lifted and narrowed and railings removed so that people can cross more easily and enjoy a more generous frontage to retail outlets in the west.

The Spaces - Kay Gardens


Garden contained by rigid form


Vehicular route through pedestrian realm


Sitting amongst trees


Seating areas amongst pockets of soft landscape


Trees with clear stems enabling visual permeability


Mature trees in a contemporary setting

8.4 Appendix 05: Glossary



1. **Active Frontage:** A design approach that encourages ground-level engagement and activity such as leisure facilities or commercial space, this is often along streets and sidewalks.

2. **Active Travel:** refers to any form of human-powered transportation, such as walking, or cycling, that promotes physical activity and reduces reliance on private-vehicle.

3. **Biodiversity Net Gain:** Biodiversity net gain is a method by which to contribute to the recovery of nature when developing land. It helps to ensure that habitats for wildlife are in a better state than it was prior to the development.

4. **Blue Infrastructure:** Water-based features and systems, including rivers, canals, and wetlands, incorporated into urban planning for multiple purposes, such as flood control and recreation.

5. **Cabinet:** Bury Metropolitan Borough Council's governing body, made up of eight Councillors and chaired by the Leader of the Council. The Cabinet has full authority for implementing the Council's budgetary and policy framework.

6. **Catalytic Regeneration:** A type of urban regeneration that is designed to stimulate broader economic and social development in a particular area or community.

7. **Clustering:** The concentration of similar businesses or activities in a specific area, fostering collaboration and specialisation.

8. **Connectivity:** The degree to which different parts of the community / urban area are linked and integrated with one another.

9. **Conservation Area:** A designated area of historical or architectural significance where special planning restrictions apply to protect its character.

10. **Consultation:** The process of seeking input, feedback, and opinions from various stakeholders often including local residents and community groups regarding development and regeneration plans.

11. **Development Plan:** A document that sets out the local authority's policies and proposals to guide land use and development within its administrative boundary. Planning authorities should consider applications in accordance with the Development Plan unless material considerations indicate otherwise.

12. **Development Principles:** The set of guidelines and objectives that provide the guiding framework for the design and implementation of a scheme or strategy. All future proposals are encouraged to consider and respond to these.

13. **Endorsement:** The formal approval or support given by a group of Council officials, in this case Bury Cabinet. Endorsement effectively makes the Regeneration Framework a material consideration in planning decisions in a specific area.

14. **Façade:** The exterior, usually street-facing, frontage of a building, including its architectural design and appearance.

15. **Framework Area:** The area within the remit of the Regeneration Framework.

16. **Green Infrastructure:** Natural or semi-natural elements integrated into urban planning to enhance environmental sustainability, such as parks, green roofs, and urban forests.

17. **Habitats:** The natural home or environment of an animal, plant or other organism. Protecting habitats helps to improve biodiversity and enhance the local environment.

18. **Hard Landscaping:** The non-living materials used in areas of public realm, including concrete, stone, brick and metal.

19. **High-density Development:** A planning and design approach that concentrates buildings and people in a compact area, often to promote sustainable urban growth.

20. **Historic Fabric:** The overall physical structure and layout of historic areas, including its buildings, streets, and public spaces.

21. **Historic Setting:** The context and surroundings of a heritage site or asset that contribute to its historical significance and character.

22. **Holistic:** Consideration of all interconnected factors in the design of a scheme or regeneration framework.

23. **Hub:** A central location that services as a focal point for transportation, economic activity or social interaction.

24. **Illustrative Masterplan:** A visual representation or concept plan that provides a broad overview of how a development or regeneration in a specific area may look in the future if the principles.

25. **Inclusive Growth:** Inclusive growth is economic growth that is distributed fairly across society and creates opportunities for all.

26. **Joint Venture / JV:** A partnership often between public and / or private entities to undertake a development or regeneration project in a particular area.

27. **Key View:** A specific visual perspective or vista that is considered to be of significant cultural, historic or aesthetic value.

28. **Legibility:** The ease at which people can understand or navigate a space or building.

29. **Levelling Up:** A national Government policy initiative aimed at reducing regional inequalities by investing in infrastructure, education, and economic development in less affluent areas.

30. **Listed Building:** A building of historical or architectural importance that is legally protected and cannot be demolished or altered without approval from the Local Planning Authority.

31. **Massing and Scale:** The physical size and arrangement of buildings or permanent structures.

32. **Material Considerations:** Factors that planning authorities consider when making planning decisions, including the guidelines and principles set out within this Regeneration Framework.

33. **Materials Palette:** The selection of materials that are chosen for use in the design of a scheme, typically including a range of materials that are appropriate for its context, function and aesthetic goals.

34. **Meanwhile Use:** Temporary use of a vacant space for a specific purpose until a permanent use can be found.

35. **Micro-climate:** The climate conditions within a small, localised area, often influenced by surrounding buildings, vegetation, and geography.

36. **Mixed-use:** The integration of different land uses, such as residential, commercial, and recreational, within a single development or area.

37. **Net Zero Carbon:** A sustainability goal aiming to balance the carbon emissions produced and removed from the atmosphere within a defined area or development.

38. **Node:** A point or location within a transportation network where multiple routes converge or intersect.

bruntwood × Bury Council

Agenda Item 10

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 07 November 2023
Subject:	Substance Misuse Service Contract	
Report of	Cabinet Member for Health and Wellbeing	

Summary

1. The Council currently commissions Greater Manchester Mental Health (GMMH), an NHS provider, to deliver its substance misuse treatment service. GMMH lead a partnership model; the adult service is provided through GMMH or 'Achieve Bury' as it is branded locally. GMMH subcontract Early Break, to provide the children's and young people substance misuse service, as well as BigLife, to provide the assertive outreach and criminal justice work. The Council is also fortunate to have Intuitive Thinking Skills, who deliver recovery focused programmes and Great Places, who provide housing support, as part of the partnership.

2. The substance misuse contract currently costs £1,308,000 per annum. The contract began in September 2019 and is a three-year contract with two optional plus one years (3 +1 +1). The first three years of the contract ended on 31st August 2022 with the two optional 12-month extensions approved thereafter. The contract is currently in its final 12-month extension year and the contract is due to end of the 31st August 2024.

3. The Council has an excellent working relationship with GMMH which includes quarterly contract meetings to discuss performance and current data. In addition, it meets with both GMMH and partners outside of these contract meetings to discuss any relevant projects or issues. GMMH are also a prominent partner in the Bury Drug & Alcohol Partnership, being one of the action plan priority leads. Since the start of the contract, Council commissioners have been pleased with both the performance of the provider and the receptiveness to adapt and further develop services to meet both the local need and assure work aligns with wider plans and works including the Neighbourhood approach and 'Let's Do It' principles.

Recommendation

Cabinet is recommended to make a direct award to the current provider, GMMH, for a period of 3 years (with the right to extend at the Council's discretion for two further years) at a total estimated cost of £4,284,000 for the initial 3 years, and £1,428,000 per annum thereafter (subject to inflation and Agenda for Change pay increases).

Alternative options considered and discarded

Tender for new provider(s)

1. Pros:

- Allows direct comparison to other providers.
- Offers confirmation that the Council is getting best value for money.
- Can ask for more for the same value, whether this takes the form of price reductions, better service, higher quality products or other added value.

2. Cons:

- Disruption to current service users and staff. Anecdotal reports from the last tender in 2018 demonstrated that implementation of a new provider caused significant disruption to service users and triggered low staff morale.
- Potential disruption to performance.
- Based on an understanding of the current market, there is unlikely to be a better provider for this role and we believe it is good value for money.
- Loss of the positive relationships already built.
- Would interfere with current / planned projects and external funding streams.
- A tender process would require extensive use of resources (particularly staff time across the organisation), which would come at a significant opportunity cost, preventing time being spent on primary prevention and current workstreams. This process would be complex and would need to consider adults, young people, and assertive outreach. This may involve tendering for more than one provider. Likely to require additional capacity to support the process.
- May lose partnership between neighbouring authorities who also have GMMH as their substance misuse provider. This currently allows for economies of scale of work, shared back-office functions and a peer support approach across all organisations involved.
- Potential loss of the benefits of the partnership model that is in place with GMMH as lead provider. The current partnership model incorporates both NHS and third sector organisations, meaning the Council is able to benefit from both types of organisations working on our substance misuse agenda.

Reasons for recommendation

Current Performance

1. The Council is happy with the current performance of GMMH. Its substance misuse services were rated as outstanding from their most recent inspection by the Care Quality Commission (CQC) in 2018.
2. In 2022 GMMH had an independent, external provider evaluate the partnership model, which overall was considered to work very effectively and reflect the aims of the contract. A copy of the full report and executive summary can be found in the background papers section at the end of this report.
3. This option would allow the Council to continue to build on already existing, positive relationships that have been built over the last four years, not just

between GMHH and Bury Council but between it and numerous other external partners. Continuing with the current provider will enable current projects and funding streams to continue seamlessly. The current contract represents good value for money, compared to other organisations and localities, evidenced in supporting documents.

Proposed Procurement Route

4. A competitive tender process would put extensive pressure on existing resources and staff time and would likely require additional support. In addition, stability and continuity of well performing providers is mentioned frequently as being essential to the care and wellbeing of service users and organisational staff, which is reflected in the potential future implementation of The NHS Provider Selector Regime (PSR). The PSR will aim to introduce increased flexibility and transparency to the procurement of healthcare services and will aim to support greater integration and the establishment of stable collaborations. The continuation of the current provider is in the best interest of the service users, all staff involved, taxpayers and the local population.

5. It is proposed that the Council continues with its current contract provider GMMH once the current contract comes to an end. Legal Services have advised that it is in order to make a direct award to GMMH in reliance on the *Hamburg* case exception, now codified as Regulation 12(7) of the Public Contracts Regulations 2015. That Regulation permits a direct contract to be awarded between the Council and an NHS or other public sector body, without competition. It is subject to ensuring the contract is in the public interest and that the public services they each have to perform are provided to achieve common objectives.

Budget Provision

6. Annual budget provision is available from Public Health funding (£1,235,360), with £192,640 of funding available from Children's which contributes to the Children's & Young People's element of the contract via Early Break.

Report Author and Contact Details:

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Department: Public Health
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Links with the Corporate Priorities:

Achieve are very client and community focused, which aligns well with our Let's do it strategy and neighbourhood approach.

The proposal will support key ambitions of the Let's do it strategy:

- A better future for the children of the borough
- A better quality of life
- A chance to feel more part of the borough

Equality Impact and Considerations:

The local data around inequalities relating to substance misuse have been analysed, as well as discussions had with relevant partners to gauge the local situation. This has been taken in to account when looking at where the inequalities lie and where there are gaps within the current system / pathways to try and reduce these inequalities. This will involve continuing current workstreams and projects that are ongoing with Achieve, as well as utilising external, additional funding. We are confident that GMMH and partners take in to account equality and protected characteristics in their day to day work and governance. The completed Equality Impact Assessment based on the current contract / provider can be found in the background papers section.

Please see the below links to the GMMH Advancing Equity and Inclusion Strategy and the GMMH Patient Carer Race Equality Framework.

Advancing Equity and Inclusion Strategy | Greater Manchester Mental Health NHS FT (gmmh.nhs.uk)

Patient Carer Race Equality Framework (PCREF) | Greater Manchester Mental Health NHS FT (gmmh.nhs.uk)

Environmental Impact and Considerations:

GMMH have an established Green Plan running from 2022 to 2025 which has been developed through comprehensive consultation with various members of staff and external partners. The Green Plan has 114 specific targets which covers 9 keys areas of focus for the trust:

- Workforce and System Leadership
- Sustainable Models of care
- Digital Transformation
- Travel and Transport
- Estates and Facilities
- Medicines
- Supply Chain and Procurement
- Food and Nutrition
- Adaptation

- Have they made a commitment to carbon neutrality of zero carbon?

In line with the targets outlined by the NHS in the Delivering a Net Zero National Health Service Report GMMH is fully committed to reducing its greenhouse gas emissions to Net zero through two clear targets from the report which will be delivered the Trust Green Plan:

- Net zero by 2040 for the emissions we control directly.
- Net zero by 2045 for the emissions we can influence.

Where applicable, and within the remit of the contract, GMMH will carry out the necessary upgrades around the targets set out with in the Trust Green Plan. GMMH has recently completed a tender exercise with a view to securing 44 electric vehicles ready for April 2024.

GMMH is currently not a carbon literate organisation, the Energy & Sustainability Manager (recently new in post) has been looking at the options available to GMMH to either deliver a Carbon Literate accredited course or options to deliver an in-house workshop that is more specific to the NHS targets, GMMH Green Plan and dynamic workforce. GMMH are a local supplier and therefore will travel less, approximately 5 miles (depending on exact location). Where possible equipment will be reused if a new contract is agreed. If equipment is needed, careful consideration will be given to procurement routes.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Provider not performing to expectations or service specification.	Quarterly contract monitoring meetings with the provider, as well as regular meetings to discuss various other projects and/or relevant matters.
Other providers being better value for money or providing higher quality care.	Market research completed prior to cabinet report.
The contract will be subject to future inflation costs and NHS Agenda for Change costings if it is continued and therefore, the price of the contract may increase if extended.	This will be monitored by Public Health and Finance to ensure such costs are factored in to budgeting.

Legal Implications:

The proposed direct award to GMHH is compliant with the Public Contracts Regulations 2015 and Regulation 12(7) in particular which permits such contracts to be entered into between two public sector authorities in the public interest.

Financial Implications:

The increased cost of this contract has been taken into account as part of the budget setting process for 2024/25 as negotiations were ongoing at this time and provision is available within the public health budgets.

Background papers:

Please list any background documents to this report and include a hyperlink where possible.

1. Evaluation of Achieve and partnership model 2022 – final report with executive summary

2. Community Care, Radcliffe – feedback

3. Equality Impact Assessment – substance misuse service

4. GM market research document – available on request.

5. Quarterly substance misuse service performance reports can be provided on request.

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

Term	Meaning
GMMH	Greater Manchester Mental Health
SSMTRG	Supplemental Substance Misuse Treatment and Recovery Grant
HMT	HM Treasury
OHID	Office for Health Improvement and Disparities
GM	Greater Manchester

July 2022

Evaluation of the Achieve Drug and Alcohol Service

Report for the Achieve partners

Final version



SQW

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Approved by:
Lauren Roberts
Director
Date: 05/07/2022

Disclaimer
This report takes into account the particular instructions and requirements of our client. It is not intended for, and should not be relied upon by, any third party and no responsibility is undertaken to any third party.
Whilst SQW has used reasonable care and skill throughout, it is unable to warrant either the accuracy or completeness of information supplied by the client or third parties, and it does not accept responsibility for any legal, commercial or other consequences that arise from its use.

Executive Summary

The **Achieve Drug and Alcohol Recovery Service** has provided **holistic support to adults and young people experiencing substance misuse issues** in Bolton, Salford and Trafford since 2018 and Bury since 2019.

The **Achieve Partnership** comprises organisations with expertise directly and indirectly related to substance misuse and recovery: clinical expertise, outreach, training, housing, and grant funding for community groups.

ACHIEVE PARTNERSHIP

GREATER MANCHESTER MENTAL HEALTH TRUST
THE BIG LIFE GROUP
EARLY BREAK
GREAT PLACES
INTUITIVE THINKING SKILLS
SALFORD CVS
SALFORD ROYAL NHS FOUNDATION TRUST
THOMAS

In 2021 Greater Manchester Mental Health Trust (GMMH) and The Big Life Group (on behalf of the Achieve Partnership) **commissioned SQW to undertake an independent process evaluation** of the Achieve Drug and Alcohol Recovery Service. The evaluation was delivered over five months, and involved a series of semi-structured interviews and focus groups, a document review and monitoring data analysis.

Key findings

While **the COVID-19 pandemic affected delivery** of the partnership and service, **the partners displayed resilience** in adapting and continuing their frontline service delivery, supported by the leadership of GMMH.

The cluster commissioning approach (to procure the Achieve service under one contract across multiple local authorities) was considered to be effective, with benefits reported at provider and commissioner levels. These include reported efficiencies in the use of public funds and improved relationships. The success of the cluster commission depended on: the capacity and competence of the lead commissioner; commissioner behaviour and willingness to share insights; the capacity of the lead provider to work across localities; and partners' willingness to work collaboratively and flexibly depending on local needs and existing provision.

The partnership model was considered to work effectively. Partners and wider stakeholders credited GMMH with providing effective leadership and modelling the necessary culture and behaviours, and partners reported close relationships and effective communication through the partnership board. A variety of benefits were identified by partners, including access to relevant training and resources, and use of GMMH's shared service user record system 'PARIS'.

Through working together, **service partners add more value. Service users were broadly very positive** about the support/treatment they received, experiencing a joined up offer. Sustaining partner knowledge and understanding of all other partner services and developments will be key to maintaining this and continuing confident internal referrals and signposting based on informed discussions with service users.

Reporting was deemed effective, but the partnership **could consider narrative evidence of outcomes alongside numerical data,** to capture the richness of service performance. Linked to this, there was concern that externally the partnership can at times be seen as GMMH's, risking obscuring vital roles played by partners; this could be partly rebalanced by narrative reporting. Alongside this, stakeholders indicated scope for **VCS and statutory service relationships to be used more** to stimulate referrals and help exiting service users to access support in local communities.

Although this was a process evaluation of the partnership, examples of impacts were identified. Impacts on stabilising drug and alcohol recovery provision were reported. Smaller partners reported benefitting from wider promotion and delivery (of some) of the services, widened knowledge of associated services, and improved access to training. Commissioners and partners have also embedded collective working as business as usual.

Service users reported positive impacts from the holistic service, although there were variations due to the support available in different areas. **Some service users who were in recovery became volunteers** with Achieve or set up their own support services, contributing to the range of support services available in local communities.

The Achieve extension into Bury indicates the **potential for the service to be replicated elsewhere**. **Important factors in enabling replication** include: commissioning leadership from a lead local authority; a lead provider with sufficient capacity to work at scale; a partnership with diverse clinical and non-clinical services, partners with a culture of collaboration, and a local VCS with diverse expertise, capacity and resilience.

As the landscape changes, this poses opportunities and risks to Achieve. **New investment** is anticipated to be positive in enabling partners to maintain and expand services. However, there are concerns about **workforce retention and recruitment**. The **introduction of ICSs** also represents a key change and it remains unclear whether there may be implications for drug and alcohol recovery services or the provider partnerships which deliver them.

RECOMMENDATIONS

Awareness raising, understanding and training

1: Maintain partnership (and wider stakeholder) awareness and understanding of partner offers.

2: Consider introducing standardised partnership inductions for new staff.

Information sharing

3: Consider whether narrative outcomes can be captured systematically alongside other monitoring data.

4: Consider how to further expand service inclusivity to respond to the diverse needs of different service user groups.

5: In any future Asset Fund rounds (or equivalent), consider whether other CVSs could play a greater role.

6: Consider whether (and if so, how) subcontracted partners can be involved in meetings or engagement with commissioners.

Evaluation and co-design activities

7: Consider whether (and how) to capture evidence of efficiencies associated with the model/contract.

8: Consider whether there may be merit in introducing co-production activities or involving service user representatives within strategic/planning meetings.

Reflection and celebration

9: Raise partner awareness of what is funded through the Asset Fund and how it may be useful to Achieve service users.

10: Build in time and space for reflection and celebration.

1. Introduction

Evaluation Brief

1.1 In December 2021 Greater Manchester Mental Health Trust (GMMH) and the Big Life Group (on behalf of the Achieve Partnership) commissioned SQW, an independent research and consultancy organisation, to undertake a process evaluation of the Achieve Drug and Alcohol Recovery Service as delivered by the Achieve Partnership. The purpose of the evaluation was to reflect on how the partnership has functioned in delivering the Achieve service, and the challenges and enablers to collaborative working and service delivery experienced. The evaluation sought to identify the added value and benefits arising from the partnership approach, and to understand what has worked well or less well regarding partnership governance, roles, leadership, delivery and monitoring. Although not the primary focus for the study, the evaluation also sought to explore service users' experiences and opinions of the support they had received through the Achieve service.

1.2 This report presents the findings from the evaluation. The insights presented are expected to inform the future development of the partnership model, highlight potential areas for improvement, and provide evidence for future funding applications.

Achieve Drug and Alcohol Recovery Service

1.3 The Achieve Drug and Alcohol Recovery Service (hereafter referred to as the 'Achieve service' or 'Achieve') was commissioned by local authorities in Bolton, Salford and Trafford in early 2018. The service aims to provide support to adults and young people experiencing substance misuse issues. It brings together eight partner organisations with specialisms in fields both directly and indirectly related to substance misuse, including those which treat the physical and psychological impacts, as well as support with wider influencing factors such as education, training, employment and housing.

1.4 The Achieve service commission was a distinctive and intentional decision by commissioners to procure drug and alcohol treatment and recovery services under one contract across three local authority areas, using a 'cluster commissioning' approach. Salford City Council (the lead commissioning authority for the contract) managed the procurement process, with support from Bolton and Trafford Councils. Each locality contributes a different level of funding to the treatment and recovery system depending on local need. Per annum, Salford contributes £3.5m, Bolton £2.5m and Trafford £2m[1].

1.5 The lead provider for Achieve, GMMH, developed a partnership with seven other organisations to offer the Achieve service: The Big Life Group; Early Break; Great Places; Intuitive Thinking Skills; Salford CVS; Salford Royal NHS Foundation Trust; and THOMAS. Together these organisations comprise the Achieve Partnership. Alongside GMMH's clinical expertise, the partner organisations offer experience and specialist expertise in community engagement and outreach,

[1] Joint integrated substance misuse treatment and recovery service for Bolton, Salford and Trafford: Service Specification (2016)

engagement with young people, housing support, education programmes, hospital interface and voluntary and community sector (VCS) capacity building and grant management.

1.6 The partnership formed covering Bolton, Salford and Trafford in January 2018 with over £40m in funding over five years. In September 2019, the partnership was commissioned to expand the Achieve service to deliver in Bury (£1.3m per annum). The Achieve service model varies across the four localities, depending on local population needs, contract value and existing treatment services. However, the service aim remains the same:

"The service will be characterised by focusing on prevention and early intervention, providing easy access and a wide range of support and interventions to build on local sustainability and the recovery capital of individuals and communities, thus reducing reliance on specialist services".[2] **(GMMH Achieve service proposal, 2018)**

Policy Context

1.7 The Achieve partnership was commissioned within a national policy context characterised by emphasis on the criminalisation of drugs, prioritisation of abstinence over harm reduction, and a period of austerity during which local authorities were being asked to deliver within increasingly constrained public finances.

1.8 The key national policy preceding the formation of the Achieve partnership was the 2017 Drug Strategy published by the Home Office. The Strategy continued many of the themes established by its 2010 predecessor, as well as the 1971 Misuse of Drugs Act, focusing on the use of drugs as a criminal issue rather than a health and social one.

1.9 In addition to its abstinence focused approach to drug and alcohol misuse, the 2017 Strategy highlighted the need for stable housing for those in recovery, as well as the challenges posed by novel drugs and chem-sex drugs[3]. However, it offered no additional funding to local authorities to tackle these issues.

1.10 Since the Achieve partnership was commissioned, the policy context at the national level has shifted to some extent, with the 2021 'From Harm to Hope 10 Year Plan' outlining plans to implement the recommendations of the Dame Carol Black Review to offer a greater emphasis on treatment, and funding increases to pay for it[4][5]. The plan includes investment of £3billion over three years, including £780million committed to 'deliver[ing] a world-class treatment and recovery system in England… treat[ing] addiction as a chronic health condition, breaking down stigma'[6]. It emphasises 'partnership working'[7] to ensure that services are 'joined up'[8], and to

[2] GMMH Schedule 7 Award Criteria Questionnaire (proposal) (p.4)
[3] 2017 Drug Strategy
[4] From harm to hope: a 10-year drugs plan to cut crime and save lives (pp.7-8)
[5] Dame Carol Black Review of Drugs Summary (p.6)
[6] From harm to hope: a 10-year drugs plan to cut crime and save lives (p.8)
[7] From harm to hope: a 10-year drugs plan to cut crime and save lives (p.43)
[8] From harm to hope: a 10-year drugs plan to cut crime and save lives (p.43)

'provide local areas with effective substance misuse treatment, mental and physical healthcare, housing and employment'[9].

1.11 This represents a broader approach which places emphasis on treatment and care for drug and alcohol users, yet the plan retains a focus on addressing drug-related crime. Retaining the focus on drug related crime has implications for the ways in which additional investment can be used to develop drug and alcohol recovery services, with targets on treatments which contribute to crime prevention and increasing referrals from police, courts and probation to drug support services, alongside expectations to expand existing service capacity[10].

Regional context

1.12 At the regional level, North West funding for addiction services was cut by 30-40% in the five years to 2018[11], placing pressure on local authority budgets and incentivising efficiency.

1.13 However, Greater Manchester's approach to drug and alcohol policy placed greater emphasis on harm reduction than that outlined in the national Strategy, with local authority strategies such as Salford's Alcohol Harm Reduction Strategy (2010–2020) and Stockport's Drug and Alcohol Strategy (2014-17) emphasising the role of general health and social services (including housing organisations) in supporting harm reduction. At the time of the Achieve partnership's formation, there was no Greater Manchester-wide strategy for drugs and alcohol.

1.14 Greater Manchester Combined Authority produced their Greater Manchester Drug and Alcohol Strategy 2019-2021 setting out three KPIs: drug and alcohol harm reduction, reductions in drug and alcohol related offending, and increased numbers of people in recovery[12]. This approach, emphasising harm reduction, was implemented in Greater Manchester after consultation with local drug and alcohol services, at a time when national policy still approached drug and alcohol misuse as a largely criminal issue. The approach adopted by Greater Manchester from 2019 aligns with the more holistic approach taken by the Achieve partnership, aiming to reduce harm through a joined up service which tackles the multiple causes of drug and alcohol use, including housing issues, mental health issues, unemployment, debt, loss and trauma.

Report Outline

1.15 The report presents findings from the evaluation, and is structured as follows:

- **Chapter 2** provides an overview of the evaluation methodology
- **Chapter 3** gives a high-level overview of the Achieve service offer and snapshot of service profile
- **Chapter 4** presents reflections on the cluster commissioning approach taken to procure the Achieve service, and the benefits and challenges experienced

[9] From harm to hope: a 10-year drugs plan to cut crime and save lives (p.32)
[10] From harm to hope: a 10-year drugs plan to cut crime and save lives (p.32)
[11] Bev Humphrey: 'The underfunding of the NHS is almost conspiratorial' | Mental health | The Guardian
[12] Greater Manchester Drug and Alcohol Strategy 2019-2021 (p.5)

- **Chapter 5** explores the effectiveness of the Achieve partnership, how well it functions and what could be improved
- **Chapter 6** considers the effectiveness of the Achieve service delivery and its alignment with other services external to the partnership
- **Chapter 7** reports on the emerging outcomes attributed to the Achieve service and the partnership to date
- **Chapter 8** discusses the sustainability of the partnership and the potential implications of new investment in drug and alcohol recovery services at a national level
- **Chapter 9** concludes with key reflections and offers some recommendations
- **Annex A** presents a collection of case studies which illustrate the impact of the Achieve service on service users, as reported by the Achieve partners.

Acknowledgements

1.16 This report was compiled by an SQW evaluation team comprised of Lauren Roberts, Rhona Murray, Sheetal Parmar and Tom Boothroyd.

1.17 We would like to acknowledge the time and insights provided by the many people who have contributed to the evaluation research and supported us by providing direct insights, introductions to key people and access to relevant data and documentation. Without stakeholder inputs the evaluation would not be possible.

1.18 In particular, we would like to thank:

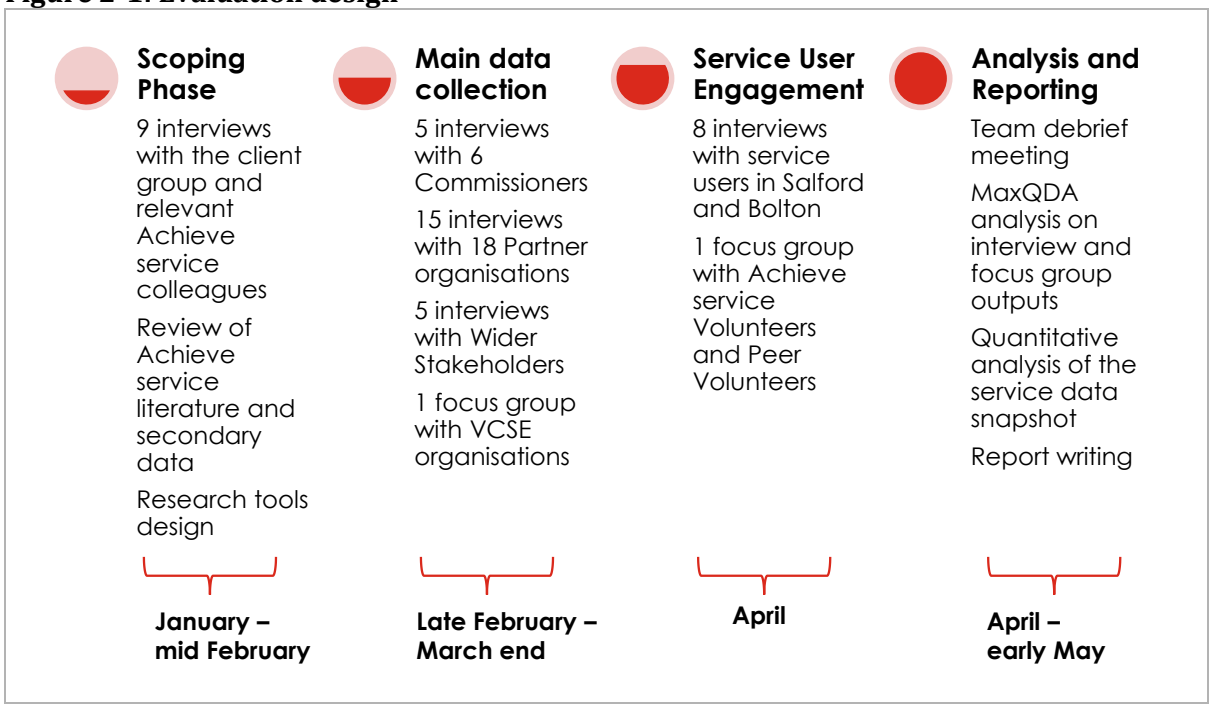
- Achieve service users, volunteers and peer volunteers for speaking to us and sharing their experiences of the Achieve service
- The GMMH and The Big Life Group client team and colleagues for engaging regularly with us, reviewing evaluation outputs, introducing us to key stakeholders, providing data and documentation, disseminating materials and recruiting participants to the study
- Commissioners, partners and external stakeholders who have taken the time to speak with us as part of interviews and focus groups, and have provided relevant documentation.

2. Evaluation Methodology

Overview of the evaluation methods

2.1 The evaluation was conducted between December 2021 and April 2022. The evaluation began with a scoping phase from January to mid-February; the main data collection phase took place from late February into April. Analysis and reporting were undertaken throughout April and into early May 2022. Figure 2-1 shows the evaluation design and timescales at a headline level.

Figure 2-1: Evaluation design



Source: SQW

Data collection methods

2.2 This was primarily a qualitative evaluation. The evaluation activities consisted of:

- A **scoping phase** to gain an understanding of the Achieve partnership and service delivery, which informed the design of research tools for the main phase of the evaluation. Scoping activities involved:
  - Semi-structured interviews with members of the client group (GMMH and The Big Life Group) who held a range of roles covering both strategic and operational aspects of the partnership and service delivery. These interviews were used to gain an understanding of the design and development of the Achieve service from inception onwards, an overview of the partnership and the delivery experience
  - Scoping calls with GMMH community development and performance colleagues, to gain insight into the service monitoring information collected and potential options for service user engagement

  - Review of Achieve partnership and service literature and monitoring data, provided to us by partners.

- The **main fieldwork** data collection exercise, which involved:
  - Semi-structured interviews with local authority commissioners (responsible for the Achieve service commission); partner organisations involved in delivering the Achieve service, and wider stakeholders (external to the Achieve partnership, but linked through service delivery)
  - A focus group with representatives from VCS organisations who had accessed the Achieve service Asset Fund
  - Service user engagement activities, via 1-1 service user interviews and a volunteer / peer volunteer focus group.
- Systematic, structured **analysis and synthesis** of the qualitative data was undertaken, and interview notes were uploaded to specialist qualitative analysis for coding to identify key themes.
- Quantitative analysis of a referral dataset from Achieve was undertaken. The data provided a snapshot of the Achieve service as it was on 10 January 2022. Further information on the analysis approach is provided in Chapter 3.
- SQW researchers held a team debrief meeting to explore emerging findings from the analysis and to consider how the findings provide insight into the research questions.

Research questions

2.3 Table 2-1 outlines the research questions which the evaluation set out to answer. The questions are aligned to three main areas of interest: the partnership model; activities and outputs; and outcomes and impacts. The research questions informed the design of the research tools and guided the data analysis process. The questions were agreed with the client group at the outset of the evaluation.

Table 2-1: Research questions

Theme	Research questions
Partnership Model	What are the strengths, weaknesses and replicability of the commissioning approach? How does the partnership function? How was the partnership developed and how has it evolved over time? Who are the key partners (and what are their roles and responsibilities)? Who else has a role to play? What are the challenges, barriers and enablers to collaborative working across the partners? To what extent is the partnership well led? To what extent are the governance, monitoring and management structures underpinning the partnership functioning effectively? What are the benefits arising from the partnership approach and structure? (with particular consideration to efficiency, shared clinical record, in-reach and interface with the acute hospital)
Activities and Outputs	What activities has the Achieve partnership delivered, i.e. services, opportunities, treatments and therapies? (considering variation by geography) Who is responsible for the delivery of activities? What activities support community development? To what extent has the delivery of services been impacted by Covid-19 or other delivery-related challenges (capacity, resource etc.) How is service user voice captured and used to inform decision making? How effective is the referral process onto the Achieve service (consider which organisations refer, visibility of the Achieve service, referral processes, suitability of referrals etc.) What signposting or onward referrals take place? How are referrals in/out of the service supported or inhibited by the partnership arrangements?
Outcomes and Impacts	What is the evidence that Achieve has resulted in improved quality of life for service users? [using evidence from case studies] Has the partnership model added value to this? What are the outcomes of the model for the partners involved? What are commissioner reflections on the model and the service outcomes? To what extent has community development been an outcome of the Achieve programme? To what extent does Achieve represent a replicable model of support? What enablers / barriers might affect replicability? What effect might recent investment in the sector have on service development and delivery?

Source: SQW

Key Considerations

2.4 While reading the report, the reader is asked to keep the following points in mind:

- The evaluation was designed to focus primarily on the Achieve partnership and how it functions. In doing so, it was necessary to explore and report on the Achieve service delivery and how the partnership approach has affected the service. However, the evaluation is not intended to be a full assessment of the performance of the Achieve service. While emerging

outcomes are reported, these are not intended to provide a complete report of the impact of the Achieve partnership and service.

- The Achieve partnership operates across four local authority areas. Achieve service delivery intentionally does not look identical in each locality. We have sought to understand where differences exist and the rationale and implications of these, as relevant.
- Stakeholders interviewed for this evaluation were nominated by the client group and relevant colleagues. Participation by those individuals was optional. As such, there may be a degree of selection bias in the findings.
- Service users, volunteers and peer volunteers were either self-selecting or approached by Achieve service staff with whom they already had a relationship. All were offered a £10 voucher for participating in the evaluation, in recognition of the value of their time and to overcome any research fatigue. All participants were assured that their feedback would be confidential, participation was optional, and would have no impact on the support they access through the service. That said, it is not possible to determine how representative their experiences may be.
- COVID-19 affected the Achieve service delivery from March 2020 to the present time, to varying degrees. A question on the impact of COVID-19 was included in the research tools to explore the effect restrictions had on partnership working and service delivery. Findings related to COVID-19 are reported in a box later in the report.
- Monitoring data was provided directly to SQW by Achieve partnership staff; SQW is not able to independently verify the accuracy or completeness of this data. It should also be noted that the monitoring data captures a snapshot period in time (referrals in the Achieve service as it was on 10 January 2022). It is not possible for SQW to confirm the representativeness of this period when compared to the overall contract period, and the data does not provide an overview of all activities during the entire contract.

3. Achieve Drug and Alcohol Recovery Service

3.1 This section of the report provides a descriptive overview of the Achieve service, exploring its aims and underpinning principles, the roles of different partner organisations, and the types of interventions delivered in the four localities. It also provides insights from a snapshot of service monitoring data from January 2022. This section is informed by interviews with programme partners and stakeholders, documentation provided to the evaluation team, and monitoring data from the Achieve service provided to SQW by The Big Life Group.

Key aims and remit of the service

3.2 As outlined above, the Achieve Drugs and Alcohol partnership spans Bury, Bolton, Salford and Trafford, and comprises a lead provider and seven partner organisations. It aims to provide a dedicated service offering advice, support and treatment to adults and young people across these boroughs experiencing problems with drugs and/or alcohol.

3.3 The key aims (as highlighted in GMMH's proposal for funding) are that the service should:

- Engage people as early as possible to reduce the impact of substance misuse, to provide timely interventions to service users and their families
- Focus on prevention and early intervention, providing easy access to a wide range of support and interventions to build on local sustainability and the recovery capital of individuals and communities, thus reducing reliance on specialist services
- Have the flexibility to be responsive through a close relationship with local communities, promoting recovery as well as supporting those with more complex needs including chronic physical and mental health problems
- Deliver services to adults and young people, providing appropriate interventions to users of all substances, including alcohol and new psychoactive substances, via effective promotion and outreach, and offer the ability to target different groups such as performance and image enhancing drug users[13].

3.4 The proposal highlighted four guiding principles that all partner organisations should follow:

- **Prevention of harm** through the provision of advice, information, outreach and brief interventions
- **Improving access** through co-locating services, a 'no wrong door' approach, and the provision of training to partners
- **Integration**, including multi-agency safeguarding and risk management, joint working and information sharing

[13] GMMH Schedule 7 Award Criteria Questionnaire FINAL.docx (sqw.co.uk)

- **Sustainability**, achieved by maximising individual and community assets, supporting the development of recovery communities and reducing demand on specialist services.

Differences in service provision across the localities

3.5 The four localities each have a combination of partners engaged in delivering the Achieve service aims and principles, as outlined below. The Achieve offer is intended to reflect the specific needs of each locality, based on needs assessments undertaken at the commissioning stage and locality plans; as such, not every partner is involved in delivery in each locality. For example, support for young people is externally commissioned in Bolton; in other localities it is provided by Achieve's partner Early Break. Hospital in-reach is also delivered externally to the Bolton Achieve service. In Bury, the Achieve service is delivered on a smaller scale with fewer partners commissioned to deliver services.

Table 3-1: Overview of Achieve services available in each locality

	Bolton	Salford	Trafford	Bury
GMMH	✓	✓	✓	✓
The Big Life Group (Assertive Outreach)	✓	✓	✓	✓
Salford Royal Hospital NHS Foundation Trust	-	✓	-	-
Intuitive Thinking Skills (education and skills)	✓	✓	✓	✓[14]
Early Break (support for young people)	-	✓	✓	✓
Salford CVS (Asset Fund)	✓	✓	✓	-
Great Places Housing Group (housing support)	✓	✓	✓	-
THOMAS (rehabilitation houses)		✓[15]		

Source: SQW

The Achieve service offering

3.6 The Achieve service covers a wide range of direct and indirect provision related to addiction, including:

- Clinical treatments targeting the physical aspects of addiction, such as managed detoxification and drug replacement programmes
- Harm reduction strategies such as needle exchanges, vaccination programmes and hepatitis C testing
- One-to-one and group talking therapies, offered both in-person and virtually, to address the underlying causes of substance misuse
- Peer support from volunteers with lived experience of addiction

[14] ITS were not initially part of the Bury offer. ITS later expanded their offer after receiving additional funds

[15] THOMAS will accept referrals from across Bolton, Salford, Trafford and Bury, however their facilities are based in Salford.

- Access to education, training, employment, housing advice, and financial support to tackle issues indirectly related to substance misuse, addiction or relapse risk[16].

3.7 By combining clinical treatment, psychosocial and therapeutic support, as well as wider support under the collective Achieve service, interviewees said the service offer was holistic.

"A drug and alcohol addiction can be massively influenced by different factors, so you need all of those elements to work together". **Stakeholder interview**

Referral, assessment and recovery coordination

3.8 Achieve services can be accessed through self-referral or referral from a third party such as a GP or medical professional; in the case of the latter the individual must agree to be referred. Following referral, the Achieve Assessment Team will contact the individual to discuss the partnership offer; this may take place in-person or virtually. A needs assessment is undertaken to assess the physical and psychological needs of those referred. This assessment seeks to establish what the individual's needs and goals are, and the assessment team will agree a recovery plan with them.

3.9 Following assessment, each individual is assigned a Recovery Coordinator. These are responsible for working with service users to identify the interventions, services and actions that will promote recovery, reduce risks, and promote health and wellbeing. The Recovery Coordinator then works with the various partner organisations to ensure that these interventions and actions are able to take place[17].

Clinical and Psychosocial Interventions

3.10 The Achieve partnership offers a wide range of clinical interventions to address the physical impacts of addiction. These include the provision of opiate substitute medicines such as methadone, access to inpatient and community detoxification, access to vaccinations and testing for blood borne diseases, access to a Consultant Psychiatrist, and harm reduction actions such as needle exchanges and safe injecting advice. The Psychosocial Interventions team provides group and individual interventions across the four Achieve localities, including clinical behavioural therapy, group and one-to-one talking therapies[18].

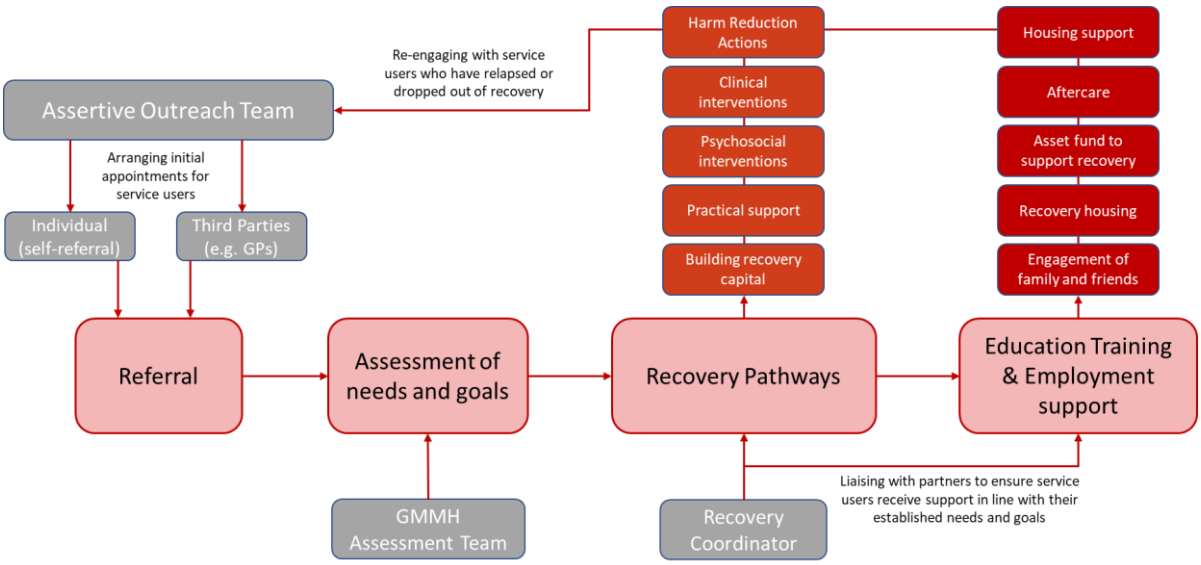
Other support

3.11 The Achieve partnership also offers support in areas indirectly related to addiction recovery, such as employment, training and education, as well as housing and financial advice. These are identified as often acting as barriers to recovery, or risk factors for relapse for service users, and Achieve partners such as Great Places assist with factors such as finding housing and benefits

[16] SQW proposal final
[17] Achieve Service Overview
[18] Achieve Service Overview

advice. Similarly, the Recovery Fund managed by Salford CVS provides grants of up to £500 for things which may support individuals' recovery, such as laptops to help people to find work.

Figure 3-1: Service Model



Source: Adapted by SQW from GMMH proposal

Achieve partner roles

3.12 The lead provider within the Achieve partnership is **GMMH**, which takes referrals from both individuals (self-referral) and third parties such as GPs or health professionals. GMMH will undertake the needs-based assessment described above, establishing what the service user's physical and psychological needs and goals are, and creating a recovery plan. These assessments can be carried out in-person or virtually.

3.13 GMMH then offer a wide range of services including support with the physical aspects of addiction (e.g. opiate substitute medication), psychosocial interventions, access to inpatient and community detoxification, Cogitative Behaviour Therapy, access to Consultant Psychiatrists, and more. As the lead provider within the partnership, GMMH is 'responsible for all elements of the service and… the single point of contact for commissioners'[19].

3.14 **The Big Life Group**'s role in the partnership is to provide assertive outreach, to support those who face barriers to accessing treatment. The Assertive Outreach team engages people within communities who are struggling with substance misuse. They arrange initial appointments with individuals and then co-create a plan to address identified needs. They also receive referrals for re-engagement of those who have disengaged from treatment within the partnership[20].

[19] GMMH Schedule 7 Award Criteria Questionnaire
[20] Achieve Drug & Alcohol Service Overview

3.15 **Salford Royal Foundation Trust (SRFT) - High Impact Substance Misuse Team (HISMT)** provides specialist alcohol and drug nurses to give holistic care within an A&E setting and on hospital wards. Services include medicated alcohol detoxification, as well as referring on to other services or RADAR (which provides rapid access to a specialist detoxification unit for patients who would otherwise require admission to an acute hospital bed). In addition, SRFT undertakes work to identify those frequently attending hospital due to substance misuse, and active case management to reduce harm[21].

3.16 **Great Places** provides advice and support to service users within the partnership with housing needs. This includes benefit advice, housing registration, floating support (not linked to accommodation) for complex cases, and outreach for rough sleepers[22].

3.17 **Those On The Margins of A Society (THOMAS)** operates two residential recovery houses in Salford, one for men and one for women. These aim to develop contingencies of behavioural change, promoting 12 step recovery. This takes place in two stages, stage one offering 24-hour support with a 26-week programme. Stage two supports people to move to more independent living[23].

3.18 **Early Break** provides support for young people up to 21 years old. This support includes psychosocial interventions, prevention, and educational work into other teams working with children and young people. In addition, it offers individual, group and whole family support sessions to address parental substance use[24].

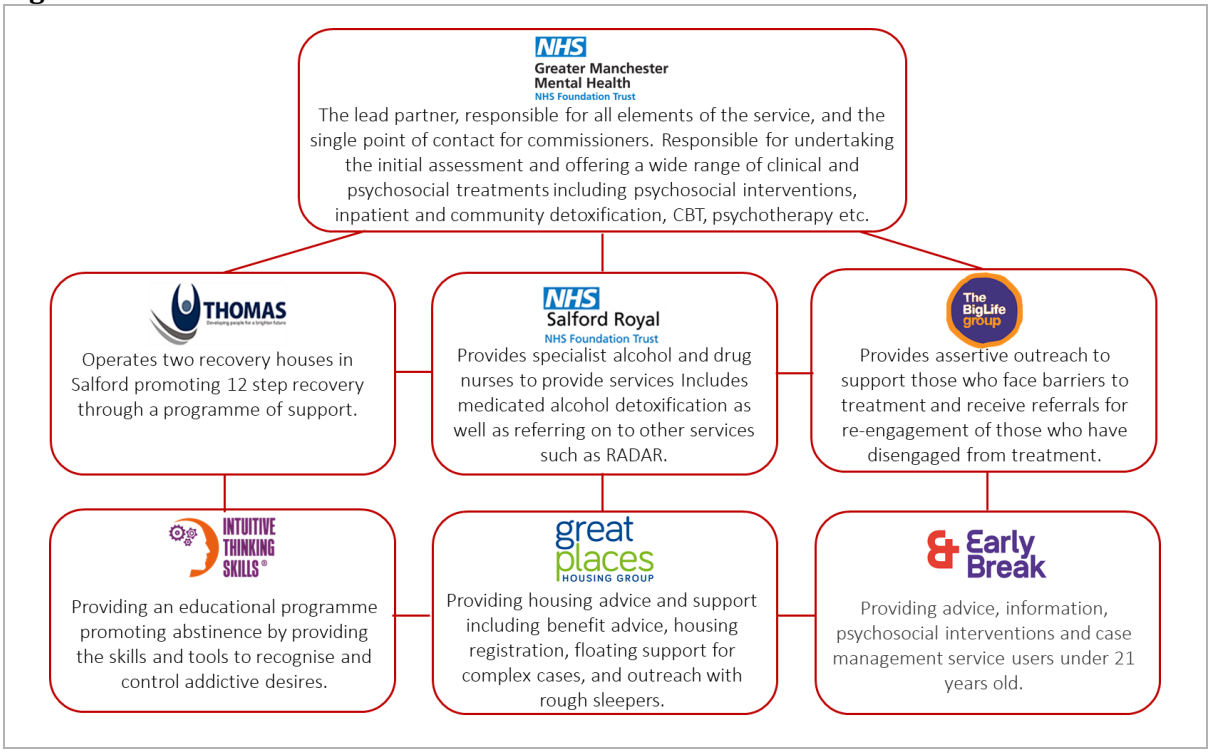
3.19 **Intuitive Thinking Skills** is an educational programme delivered by course coordinators with lived experience of addiction services. The programme is designed to provide skills and tools to recognise and control addictive desires. The course concludes with participants creating a meaningful plan of abstinence[25].

3.20 **Salford CVS** manages the Asset Fund which provides up to £5,000 to VCS organisations to fund activities which support the rehabilitation process[26]. In addition Salford CVS manages the Personal Support Recovery Fund which provides grants of up to £500 for specific items which may be beneficial in achieving recovery goals[27].

3.21 In addition to the core partners above, the partnership collaborates with a number of external partners covering a range of services including Probation services, homelessness and rough sleeping local authority services, as well as a variety of other organisations from the VCS sector, some of which are funded by the Achieve Asset Fund.

[21] Achieve Drug & Alcohol Service Overview
[22] Achieve Drug & Alcohol Service Overview
[23] Achieve Drug & Alcohol Service Overview
[24] Drug and alcohol support • Salford City Council
[25] Achieve Drug & Alcohol Service Overview
[26] Achieve Drug & Alcohol Service Overview
[27] Drug and alcohol support • Salford City Council

Figure 3-2: Achieve Partner roles



Source: [Drug and alcohol support • Salford City Council]

Snapshot: Achieve Service

3.22 This section provides a snapshot of the Achieve service as it was on 10 January 2022.

3.23 Data analysis was carried out by SQW on the direct contact report for the four localities, to illustrate the service context at the time of research. This anonymous dataset showed details of referrals live within the Achieve service as of 10 January 2022.

3.24 Given the quarterly monitoring and contractual reporting requirements followed by the Achieve service, it was agreed there was little added value in duplicating reporting submitted elsewhere. The snapshot is intended to present the profile of the service user population at one point in time and highlight points of interest.

3.25 The data only includes those individuals who had a live referral within the service at that point in time. The analysis has further condensed the data to include only those referrals with a start date between January 2018 and 9 January 2022, reflecting individuals accessing the service at that point in time who had joined the Achieve service from when the partnership was established. To contextualise the data, additional population data has been sourced from the Office of National Statistics[28].

[28] Where this is the case, readers should be aware that the data collection dates will not directly correlate as the Achieve data report is a live document.

Demographics

Locality

3.26 Across the partnership in January 2022, Bolton accounted for the largest proportion of referrals, followed by Salford, Bury and then Trafford. This scale follows the population sizes of each locality, with the exceptions of Bolton and Trafford. Bolton comprised 46% of the referrals to Achieve (while accounting to 29% of the cluster population aged 16-64) while Trafford accounted for 24% of the overall cluster population aged 16-64, but only 12% of the Achieve referrals.

Table 3-2: Locality comparison – Achieve vs wider population

	Achieve		Wider population of the cluster 2020 (aged 16-64)		PP Difference – Achieve vs population
Locality	**Referrals**	**%**	**Population**	**%**	
Bolton	1,346	46%	176,200	29%	17%
Bury	571	19%	117,000	19%	0%
Salford	671	23%	172,900	28%	-5%
Trafford	353	12%	145,400	24%	-12%
Total	**2,941**		**611,500**		

Source: Achieve Monitoring Data; ONS

3.27 There are four treatment categories to which referrals can be allocated, depending on individuals' presenting needs: alcohol; alcohol and non-opiate; non-opiate; and opiate (the latter may or may not include alcohol use alongside opiate use). Almost two thirds (62%) of referrals across the cluster were opiate referrals. The scale of this service user group varied in comparison to the others across localities, with opiate referrals ranging from 77% of referrals in Bolton to 37% in Trafford. Alcohol misuse referrals accounted for almost a quarter of all referrals within the cluster, with a higher proportion in Trafford (43%), and lower proportion in Bolton (15%).

Gender

3.28 According to the latest national adult substance misuse treatment statistics 2020/21[29], more than two thirds of people in any treatment category were men, compared to slightly less than one third being women (68% men to 32% women). Within Achieve as of January 2022, the service reflected a very similar gender split, with 898 women (31%) and 2038 men (69%) in the service.

3.29 Nationally, people in treatment for opiate misuse made up 51% of the service user population. Within Achieve, opiate misuse also accounted for the largest service user population, and a higher percentage of service users required support for this than nationally (62%).

[29] https://www.gov.uk/government/statistics/substance-misuse-treatment-for-adults-statistics-2020-to-2021/adult-substance-misuse-treatment-statistics-2020-to-2021-report

3.30 Those entering into Achieve were most likely to require support for opiate misuse or alcohol misuse. Women entering the service were more likely to be referred for alcohol misuse support than men (30% of women, 22% of men).

Ethnicity

3.31 Within the Achieve service, the vast majority of referrals were for ethnically white people (92%). This was broadly consistent across the four localities, ranging from 84% to 94% of the service user population. This snapshot is similar to the national picture, which shows 90% of referrals are for white service users. It is worth noting that Trafford had a slightly larger proportion of referrals from Asian, Black, and other ethnic groups (16%).

Employment and accommodation status

3.32 Nearly half of all referrals to Achieve were for people who were unemployed in January 2022, with slightly over a third being economically inactive. For Bolton and Salford, over half of their referrals were unemployed people, whereas the largest referral group in Bury and Trafford were those who were economically inactive.

3.33 The majority of Achieve referrals were for people living in mainstream housing. While those living in supported accommodation (with mental health care, criminal justice support or other support) and residential facilities accounted for a small proportion of referrals, it is worth noting that in 2021 these referrals were received in much larger numbers than in previous years. This suggests that outreach to individuals in supported accommodation, residential facilities and hospitals is proving effective in increasingly finding unmet need relevant for Achieve services.

Contact with service users

3.34 Contact with service users is structured by their recovery pathway and assessed risk, and the frequency is dependent on the requirements of each pathway. Those on Chaotic / Complex Lifestyle pathways are identified as needing enhanced case management with a high level of engagement to prevent them disengaging from the service, whereas those on the Making Progress or in Recovery Support pathways are reported to require less intensive case management. The largest group of referrals (46%) were considered to be 'Stable or Stuck' on their recovery pathway in January 2022, regardless of when they were first referred to the service. A fifth of referrals were for people considered to be 'Making Progress'; a further 15% were on a Chaotic / Complex Lifestyle pathway.

3.35 Around 75% of all last contacts made with service users using Achieve in January 2022 were by phone, regardless of the timing of the contact. This is likely to reflect the staggered opening of service facilities following COVID-19 restrictions easing; there is now a targeted effort to revive face to face contact with service users.

3.36 While 61% of referrals opiate misuse had very recent contact with Achieve (within the last four weeks), over 50% of service users with alcohol, alcohol and non-opiate and non-opiate support needs also had a last contact recorded within the previous four weeks.

3.37 Over 80% of all referrals for support for opiate misuse had received a Naloxone pen/spray and the relevant training in how to use it. This is part of a wider harm reduction approach and is viewed by stakeholders as a positive development for the Achieve service, in ensuring there are a greater number of people able to respond to suspected opiate overdoses. However, around 13% of referrals had refused to receive Naloxone as of January 2022, which indicates there is still a small group resistant to this approach[30].

[30] Consultees suggested that the previous reliance on injectable Naloxone was a reason for some service users declining the offer, to minimise the risk of substance misuse relapse. However, the recent introduction of nasal spray Naloxone was seen as offering a way to mitigate this.

4. Reflections on the Cluster Commissioning approach

4.1 This chapter reflects on the commissioning approach taken to procure the Achieve service. It explores the rationale for undertaking a cluster commission across Bolton, Salford and Trafford, highlights the benefits reported to be emerging from this approach, as well as the challenges associated.

4.2 Commissioning is the "process of assessing needs, planning and prioritising, purchasing and monitoring health services, to get the best health outcomes"[31]. Typically and historically, local authorities have independently procured public health services for their local populations. 'Cluster commissioning' can be defined as the process by which commissioners from different local authorities work together to procure services to be delivered by the same provider(s) across their local authority areas. The cluster commission approach taken to procure the Achieve service was considered to be a unique approach to commissioning within drug and alcohol recovery services among the three Greater Manchester local authorities (Bolton, Salford and Trafford).

Rationale for cluster commissioning

4.3 Stakeholders were asked to explain the rationale for undertaking a cluster commission approach to procure a drug and alcohol recovery service. The key reasons given are explored below.

Efficiencies

4.4 Stakeholders reported that cluster commissioning offered a cost-efficient way to procure substance misuse treatment and recovery services for their local populations. This was seen as particularly important given financial pressures on local authority budgets. Previously each of the local authorities procured treatment and recovery services independently, which was reported to be a resource intensive process which distracted from service development. By setting up a cluster commission, efficiency savings were expected through joint planning and procurement processes (including on the specification design, provider bid assessments, selection interviews and contract award administration). Efficiency savings were expected by commissioners in the service delivery as well, through providers having teams and roles spanning the local authorities and being flexible in response to variable demand.

"It was the intention to drive some cost effectiveness through collaborative commissioning to get more out of the contract than would have been possible if each area had gone on its own." **Stakeholder interview**

4.5 Cluster commissioning was also anticipated to be an efficient way to access knowledge and expertise from providers. One stakeholder reported that high levels of demand on commissioners (in balancing multiple commissioning responsibilities) can limit capacity to engage in strategic leadership and systems thinking on each service area. Using lead providers was expected to offer

[31] NHS England. https://www.england.nhs.uk/commissioning/

valuable insights on these issues, and commissioning on a cluster basis was anticipated to offer an efficient way to achieve better integrated services.

4.6 The pressure on local authority resources was reported to extend to commissioner time to support service providers. This necessitated a provider who could operate relatively independently, with established governance processes in place and the capacity to monitor the contract and performance of partners.

4.7 A cluster commission approach was also anticipated to offer a way to insulate the cluster from future budget cuts, by procuring a longer-term contract. The contract was designed to span an initial three years, followed by two single year extension options. It was hoped this model would ensure the stability of the service over the cluster for a longer period.

Benefits of cluster commissioning

4.8 Above sets out the rationale for the commissioning model. The following benefits of undertaking a cluster commissioning approach were reported to have emerged:

- **Responsiveness to mobility of service users –** for some residents in Greater Manchester, accessing health services can mean crossing into different local authority areas. For example, Trafford residents may use Salford Royal A&E or Wythenshawe Hospital services. As such, commissioning a service on a cluster basis was reported to minimise the risk of discontinuity, variable access or fragmented care.

"Boundaries are blurred and porous within Greater Manchester, which is difficult for service delivery. People move across boundaries - so the idea of Bolton, Salford and Trafford coming together as one area is more realistic and reflective of people's experience." **Stakeholder interview**

- **Stronger commissioner voice when delivering at scale –** it was suggested that a cluster commission can strengthen the commissioner voice in discussions with a service provider. Where themes arise which service delivery needs to adapt to, these themes are reported to often be common across multiple local authorities. If these themes are recognised across the cluster, commissioners can jointly ask the provider to design a response at scale.
- **Efficiencies for smaller local authorities -** efficiencies were reported (in resource and capacity) from a joint procurement approach. These also derived from the lead commissioner managing the provider contract monitoring and performance reviews.
  - Access to specialist services was reported to be a challenge for smaller local authorities; being part of a cluster offered access to shared specialist resources.

"Yes, it has advantages particularly for smaller local authorities like [area]. It's quite resource intensive to go through the commissioning process, so a lead commissioner can deal with paperwork." **Stakeholder interview**

- **Opportunity for expansion –** the cluster commission provided a blueprint for other commissioners - specifically Bury, which joined the Achieve cluster in 2019 via a similar commissioning specification. Bury was reported to be able to benefit from other

commissioners' knowledge of the processes that the lead provider had in place, which was reported to have removed an element of risk.

- **Improved commissioner relationships offering potential for further cluster commissioned services –** some commissioners reported that by operating in a cluster, they had developed closer working relationships and were more likely to meet to pool their expertise on future commissions. It was reported that following the Achieve commission, Bolton and Salford had jointly commissioned a sexual health service across both local authorities.

Challenges in cluster commissioning

4.9 Despite the benefits reported, there were several challenges flagged by stakeholders linked to this commissioning approach. Specifically:

- **Scale of the ambition –** initial concerns were reported that no providers would bid due to the 'very challenging specification' and scale of the service requirement, which required a bidder with sufficient scale, confidence and capacity to deliver. There was a recognition that smaller, local providers (who might have otherwise tendered for a single locality service) would not have the ability to meet a cluster ask, other than through working in partnership. However, despite this concern it was reported that the scale did not lead to a lack of bids or competitive process.

"You need to be ambitious for service users, because if we're not ambitious as commissioners then how do we expect service users to engage in the process of recovery?" **Stakeholder interview**

- **Differences in demographics –** one concern reported was how to ensure the service would meet the different needs of populations in each locality. This wasn't reported as a realised challenge in the Achieve service delivery, but identified as a potential challenge during the commissioning process in drafting the specification.

"There's pros and cons. It's beneficial in terms of pooling skills and knowledge and having a consistent offer - but it's good to be able to respond to things coming up in just your area… Is there some leeway in that model to respond to things that are happening in just that area, as there are differences between what's going on in [different localities]? It's great to have a bigger organisation that can attract more skilled people and share more knowledge, but it's important to allow for that response to what's going on where you are." **Stakeholder interview**

- **Unequal efficiencies and risks for different commissioning authorities** – for example, stakeholders acknowledged that the lead commissioning authority would realise lower efficiencies from undertaking a cluster commission in the early stages of the cluster approach, due to providing capacity for managing the procurement process. Discussions on the service scope were described as a 'lengthy process'; however, it was recognised that the commissioner, while 'holding the reigns' could gain from enhanced relationships and knowledge transfer.

- **Initial adaptation to the cluster commission was experienced unevenly across local authorities** – the commissioned provider(s) already delivered in some local authorities and not others. The TUPE of staff from previous provider(s) and initial delivery period was reported to have been more resource intensive and challenging in some localities than others.

Cluster commissioning – summary of key findings

- Using a cluster commissioning approach was considered relatively novel and unique, and there was a clear rationale for commissioning at this scale across the three localities
- The approach was not without risk, with several possible challenges and concerns identified, including relating to the profile and volume of potential bidders, and unequal benefits/risks across different localities. However, many of the initial concerns or risks are not reported to have materialised or had a significant impact overall
- Several benefits were reported to have emerged from the cluster commissioning approach, including several leading to wider or longer term opportunities, such as improved commissioner relationships, developing a replicable model/specification for other localities to learn or benefit from, and reports of efficiencies being achieved
- Overall, commissioners involved thought that a cluster approach was an appropriate commissioning approach to take - both in terms of efficient use of public funds and for the benefit of service users.

5. Effectiveness of the partnership model

5.1 This chapter explores how effectively the partnership has been operating across Bolton, Bury, Salford and Trafford since the Achieve service was commissioned. It sets out reflections from stakeholders on what has worked well in how the partnership has operated to date, and benefits for partners from being part of this model. The second part of the chapter considers what could be improved in how the partnership operates, identifying areas for future focus.

5.2 It is important to note that it is not possible to say how much more the partnership might have developed had it not been for the COVID-19 pandemic. The partnership operated for two years (and less than one year in Bury) before COVID-19 impacted upon its operations. To account for the change in context, reported reflections and impacts of COVID-19 on the partnership and service delivery are presented at the end of this chapter.

What works well within the partnership

5.3 Stakeholders identified a range of ways in which the partnership has worked well in enabling them to deliver the service and support to service users.

Provision of a holistic approach

5.4 One of the reported strengths of the partnership approach is that it sees the 'whole' of the service user's situation and treats their substance-related needs holistically. Partners were clear that a holistic approach to care is particularly important for treating drug and alcohol addiction; service users often have complex needs which can be further influenced by external factors (e.g. access to housing, employability support and training and social/peer support networks). Stakeholders agreed that a single provider approach would not offer sufficient expertise across a range of services to be able to meet the needs of all service users.

"The Achieve partnership is a lot better because we've got housing, we've got outreach and all the other different aspects of it, and which we probably didn't have (or we did have but it was more buried). Whereas now it's part of us, it's so easy to just refer service users to them." **Partner interview**

5.5 While partners would need relationships to other service providers when supporting service users with complex needs prior to Achieve, they thought being part of the partnership with other providers enabled closer relationships. One partner observed that for the service user there is a much clearer pathway from service entry to exit within a partnership. They thought the journey from assertive outreach into clinical treatment (if required), with access to wrap around services, was a clear and comprehensive offer facilitated by close partnership links. Being part of Achieve also means partners have information on the other services an individual may engage with, and don't have to fully depend on service users self-reporting their experiences and treatment journey.

"It's about being able to make a safe decision as to whether we can meet someone's needs - and because of that link with GMMH we already know what services they've accessed, whether that's been beneficial, whether they've disengaged. It's a true reflection. If we're assessing a self-referral we have to assume they're being honest with us and it's not an informed decision we're making." **Partner interview**

5.6 In addition, stakeholders were positive and saw value in the service offers provided by each individual partner and the fact they could support service users on different recovery pathways. The assertive outreach service was frequently referred to as a valuable addition to the partnership offer, as were the rehabilitation services. Having clinical input into multi-disciplinary team meetings was seen as extremely useful, as service user review discussions were seen to benefit from the clinical advice and safety input, and were reported to result in better outcomes for the individual as a result.

"The assertive outreach we didn't have before, [the in-reach] hospital offer [...], the community inhouse rehabilitation. Those kind of additional offers you would never get if you didn't have this cluster contract. Also, the prevention work has been quite innovative but demonstrated really good outcomes... It's the specialism of allowing people who are good at what they do [to do it] and not to diversify to areas where they are less comfortable and provide less[er] quality services as a result." **Stakeholder interview**

Strong leadership, close relationships, and good communication

5.7 Commissioners observed that the senior leadership from the lead provider was strong, both within their own organisation as a delivery partner and with other organisations in the partnership. The governance, performance and contract monitoring processes were praised as robust and reporting requirements were reported to be consistently met. For commissioners, the leadership team were reported to be accessible and responsive.

5.8 Partners thought their relationships with other providers were closer, in part due to the monthly partnership board meetings, which enabled organisations to meet and share service updates regularly. Linked to this, having discussions in these meetings around different aspects of the work, collective performance and wider system changes and challenges helped partners to develop a collective sense of 'togetherness'. One partner pointed out that being able to be part of Achieve and work collaboratively but retain their organisation's identity within the partnership was a real strength of the model. Relationships between the lead service provider team and each partner's management team were thought to work well, and information was seen to cascade down from partnership board meetings to frontline service teams.

"Before the partnership was developed, things were a little bit disjointed. There were lots of separate organisations all doing good jobs but in their own way, whereas now we all seem to be working a lot better together." **Partner interview**

5.9 Good communication through the partnership board meetings helped partners to problem solve where needed. In the initial stages of the partnership, waiting times for access to treatment and

recovery services varied across the localities, and some services were offered more frequently than others. Through the partnership board meetings, management changes were reported to have been agreed which put in place one manager to oversee specific teams operating across the four localities. This was credited with ensuring that teams, regardless of locality, had a consistent approach to management of administration, assessments, recovery coordinator allocation and service goals. One partner reported that, since the changes, waiting times have reduced and service users are moving through the system more quickly.

Co-location of partner organisations

5.10 Partners shared examples of co-location arrangements where their organisation had staff working in GMMH buildings, either buildings specifically used for Achieve service delivery or within the wider organisation. Co-location, especially where space was shared on the same floor level, was said to facilitate the development of closer relationships between partners and support effective communication and information sharing.

5.11 One partner also reported that service users benefitted from partners co-locating; if service users made disclosures during their visit, for example relating to extra needs (e.g. regarding housing), co-location with the relevant partner enabled swift engagement. Where partners were co-located, this was reported to enable them to accommodate cases which would benefit from a joint approach at short notice. Another said that co-location helped to increase instances of joint home visits by partners, which was reported to speed up access to structured treatment.

"When we were all in the same building, that created the relationships. We were all communicating really well because we were sharing a building. We would do joint home visits [...] and that enabled people to get into structured treatment quicker." **Partner interview**

5.12 Despite its reported benefits, interviewees reported that, due to COVID-19 and financial constraints resulting in building closures, there were fewer opportunities to co-locate with partners than previously. In addition, one partner highlighted that finding appropriate space for co-location was challenging in some areas. It was suggested that co-location within a building but with partners split across different floors can restrict the benefits, highlighting the need for appropriate suitable space for benefits to be fully realised.

Shared record system: PARIS

5.13 One intended benefit of the partnership approach was the use of GMMH's electronic case management information system (PARIS) by partners, to record and share relevant service user information. PARIS captures information on referrals, waiting times, care plans, diagnoses, and outcomes. The system is designed to be fully accessible throughout all aspects of the treatment journey. It was intended that partners would be able to access the data to ensure service users receiving different interventions could be monitored across systems, and data reported accurately.

5.14 Where partners had access to and use of the system, they reported that having information on an individual's history of service engagement and their current care plan was very helpful in

informing their input and making them aware of any safety concerns. Partners also valued having access to service users' key worker contacts more easily.

"Having one system helps us manage risk effectively and not duplicate [...] Hopefully we're enabling service users who need to access more than one clinical service do so in a seamless way." **Partner interview**

Access to training

5.15 Partners anticipated gaining access to some additional training through joining the partnership; there were a range of commitments related to supporting partner training outlined in the Achieve bid. For example, as part of the bid GMMH committed to:

- Increasing the knowledge and understanding of alcohol and drugs across local communities and partner agencies through targeted training
- Delivering dual diagnosis training to mental health staff and substance misuse service staff, as well as partner providers
- Comprehensive training to enable accurate recording of information efficiently
- Using the Occupational Development Training Team (ODTT) to provide general drug and alcohol awareness and brief interventions training; to develop high quality bespoke courses and content for each locality to raise awareness and understanding of local pathways and systems of onward referral
- Complementing the core offer from the ODTT with the range of free courses offered by the GMMH Recovery Academy[32].

5.16 Partners confirmed that the commitment to offer training was met, and talked about having access to a wider training offer through being involved in the partnership than they could otherwise access as an individual organisation. However, the range and benefits achieved were unexpected to some partners.

5.17 Resources reported to have been accessed by partners through the NHS Learning portal included training materials on safeguarding, health and safety, data and record keeping, law, and use of personal protective equipment. Specific drug and alcohol training resources, including on dual diagnosis, were also accessed through GMMH's Recovery Academy. One partner reported that access to bespoke training for service users with specific needs (e.g. epilepsy) was an added benefit which they would not have been able to realise if not part of the partnership.

5.18 Smaller scale partners said that they felt reassured by having access to a wider bank of training resources. One reported that their staff working on Achieve were better equipped than staff within the wider organisation, due to the quality and variety of training offered; they subsequently identified internal champions who could pass on key elements of this training to other staff. Another highlighted that their wider staff team were able to access the training offer,

[32] Achieve Service Proposal: Integrated Substance Misuse Treatment & Recovery Service in Bolton, Salford & Trafford

providing upskilling benefits to the whole organisation. There have also been opportunities for partners to access additional training at a reduced cost through the partnership which have been used in some instances, such as upskilling on mental health care and motivational interviewing techniques. One partner who talked about these offers considered them a positive addition to their training options.

"We took advantage of lots of different types of training: safeguarding training, dual diagnosis training. Our staff are much more equipped on this account than they probably are in other services they work in. There is a lot of resource within this partnership that we can tap into without costing us money. We did anticipate this would happen but we've enjoyed that much more than we expected. We utilise a lot of that training for staff and we had this in mind when we went for the contract." **Partner interview**

5.19 Partners also reported accessing training from other partners related to partners' specialisms, including housing models and support for young people. It was also suggested that the knowledge held within the partnership offers scope for further training to be delivered internally.

5.20 In addition, partners called for other stakeholders and organisations to be considered for potential training opportunities, such as criminal justice. It was noted that partners had good links with wider stakeholders through, for example, the Drug and Alcohol Working Groups, and these could perhaps be used to access further training without needing much additional resource.

What could be improved within the partnership

5.21 That said, some suggested improvements were identified, as outlined below.

Evidencing outcomes for commissioners

5.22 Overall, reporting was highlighted as working well. It was observed that there is strong leadership from GMMH on service performance and contract monitoring, and noted that the partners clearly respect each other's expertise and experience. It was suggested that the partnership could develop further in two ways: using narrative to evidence outcomes, and increased visibility and engagement of partners.

Using narrative to evidence outcomes

5.23 Commissioners acknowledged that reporting about a partnership model which covers multiple localities is harder than it would be for a direct provider covering a single locality. In addition, the varied characteristics of the drug and alcohol service user population, in terms of their needs and services they access (including clinical, recovery and wider statutory services), adds another layer to the complexity to reporting. It was reported that commissioners receive the information required and feel able to request additional information, however it was suggested that further narrative evidence could be useful.

5.24 The current data, which covers a series of KPIs and clinical outcomes reported by the partnership, was reported to lack a coherent narrative about the partners' work in delivering the service, including any challenges and achievements experienced. While the clinical data reports were

considered important to ensure service delivery is working well, it was suggested that a narrative style of reporting would be useful in illustrating how service needs are changing and how service delivery is responding to those needs. Commissioners could perhaps then use this to inform strategic planning for future service development. A continuous narrative was also thought to be useful in circumstances where commissioners were asked to respond to political enquiries within a short timeframe.

"We want to know how to maximise the use of the data. There needs to be a coherent narrative, we need to be evidencing value for money, to be able to tell a story, who are our users, who's come into contact with the service, what are the emerging trends, what are the changes demographically?" **Stakeholder interview**

Visibility of partners

5.25 As there is no direct commissioning relationship with wider partners, the extent to which commissioners have relationships with partners in the Achieve service varies. Where these relationships do exist, they are reported to have typically been built through other activity, such as wider Drug and Alcohol Working Groups. While commissioners feel able to contact subcontracted partners, particularly where they have contacts within the organisation, it was suggested that including subcontracted partners in some commissioner-provider meetings could be helpful, to enable commissioners to discuss any queries directly, hear the narrative around the service delivery and 'get the story behind the numbers'.

Partner awareness of the whole partnership offer

5.26 Partners varied in their knowledge and understanding of other partner organisations within the partnership. The initial partnership board meetings (hosted by each partner organisation on rotation) were considered to be valuable in enabling partners to meet both management and delivery staff in partner organisations. Due to COVID-19 restrictions and workforce turnover, understanding of partner services was reported to now be more variable, particularly where partners' service delivery doesn't directly link or interact. It was suggested that training about the partnership is not always consistently included in partner induction programmes; this was reported to be a missed opportunity to maximise the potential of the partnership arrangement.

5.27 One partner felt that an initial lack of understanding of their service resulted in inappropriate referrals, and subsequently developed and delivered training within the partnership to resolve this issue. Another called for more visits and exchanges with other partners, specifically operational / direct delivery staff, to increase their knowledge and understanding of partner offers, and to explore opportunities to further link up services. There was also a suggestion that partners could agree to resume the rotation of partnership board meetings to help maintain awareness of service development.

"Sometimes the partnership could be utilised more than it is. There was an understanding that new staff would be given a PowerPoint [on the partnership] as part of the induction. That's not always happened." **Partner interview**

Partnership coordination

5.28 There have been instances where the Achieve partnership has been represented in wider meetings by multiple individuals at the same time, as a result of partner organisations receiving invites independently. Although not identified as a major issue, it was suggested that partnership engagement in wider meetings could perhaps be better coordinated to maximise efficiency of resources, and associated information could be cascaded through the partnership board.

Greater use of external stakeholders

VCS organisations

5.29 It was suggested that partner staff, specifically Case Workers and Recovery Coordinators, could be more proactive in signposting to other support groups and activities for individuals transitioning out of the Achieve service.

5.30 It was mentioned that there is a directory being developed which would list the VCS organisations working in the recovery sector and raise awareness of the variety of services available within the sector. Stakeholders were pleased with this development and thought this would be a useful resource.

5.31 It was also suggested that including an organisation set-up and led by people with lived experience within the partnership could add value to the model. Currently it was reported that service user voice tends to be shared through VCS organisations rather than directly sourced. Including service user voice was suggested as a mechanism to increase awareness of service user concerns, such as ensuring better understanding around issues affecting specific groups (e.g. neurodiverse service users).

Statutory services

5.32 While stakeholders thought partners were good at engaging with wider services such as the Probation service and Job Centre Plus, it was suggested that there may be scope for more strategic or management engagement, with the aim of improving understanding among statutory services of the partnership and the Achieve service offer, and improving the level of referrals.

5.33 For example, one partner suggested that persistent, out of date stereotypes limit willingness of some statutory services to refer service users to the Achieve service, and indicated that increasing wider understanding of the holistic support provided, for example on issues relating to housing and education, may help to overcome reticence to refer.

"As a service, we're very good at engaging other services: Probation, Job Centres, but there's never a representative on the partnership board with regards to external services, which is probably a criticism of that - because I think getting other services involved in that partnership is a fundamental part of being able to promote the service. The point is if [external service] knew of other services available within the partnership they may not have that stereotype of the service…. so we'd see an increase in referrals if there was a wider understanding of what's provided within it – it isn't just a recovery service, or illness service or a mental health service. If a perception of statuary services is

that they'll get lost in the recovery wheel, they're less likely to refer to drug services." **Partner interview**

Shared record system: PARIS

5.34 Despite welcoming a shared system, interviewees reported that access to and use of PARIS varied between partners. It was acknowledged that one system cannot meet every partner requirement; that said, the extent to which partners have been able to use PARIS has reportedly differed, and the use of PARIS in Bury is optional for partners.

5.35 Concerns were raised by some partners that PARIS does not fully meet their needs, with calls to be able to input and access more outcomes data on their service users, and to run reports for their own organisational use. It was also suggested that variable access to the system was not in line with the 'no wrong door' approach to the Achieve service.

5.36 Interviewees also observed that the system, having been developed and used by GMMH originally, is more appropriate for adult service users who have engaged with clinical treatment services. Younger service users were reported to be less likely to require clinical support, and within PARIS there is reportedly limited space to input details of wider service use.

5.37 In addition, ongoing technical access issues were reported, including log-in challenges, read only access and delays in onboarding new staff to the system, which we understand partners are working with GMMH IT services to resolve.

"There are brilliant things about PARIS. It enables us to have oversight if someone's a clinical [patient] so we can understand what's going on - but the benefits don't outweigh the negative…." **Partner interview**

Partnership model – summary of key findings

- Overall, the partnership model was considered to work very effectively and reflect the aims of the contract
- Within the partnership, the lead provider was thought to provide effective leadership. Partners report close relationships and good communication through the regular partnership board, contract and performance meetings
- Benefits also stem from opportunities for partners to physically co-locate their staff, the wide sharing of training resources, and where accessed, use of GMMH's shared service user record system PARIS
- There were several areas for future development identified by partners which included:
  - Considering whether service outcomes could be evidenced in a narrative format, alongside quantitative reporting for commissioners
  - Ensuring partner knowledge and understanding of all other partner services and developments remains consistent, through embedding the information in staff induction processes and maintaining partner site visits and partnership board meetings (where possible)
  - Using VCS and statutory service relationships more to stimulate referrals into Achieve and help service users exiting the service to find support in their local communities
  - Reviewing the extent of partners' access to PARIS, identifying any issues to resolve and where alternative information sharing can be used to overcome any barriers.

Reflections on the impact of COVID-19

The Achieve partnership and service had operated across Salford, Bolton and Trafford for two years prior to COVID-19, and less than one year in Bury. Stakeholders broadly agreed that COVID-19 had interrupted the development of the Achieve partnership and service, and more could have been achieved were it not for the pandemic.

"Drop in and home visits were cancelled. All we could offer was telephone support. While that's great, it's not quite the same as face-to-face. You don't get a clear understanding of what's going on in somebody's life." **Partner interview**

Service activities offered by partners were either paused, adapted or transferred online.

- Education and skills courses were transferred online and 1-1 sessions were provided digitally, which were welcomed by service users. While some key workers and service users preferred this delivery model, the model was reported to be unsustainable after restrictions were eased, as the service was funded on the basis of hosting face to face, group sessions.
- Clinical partners reported challenges due to staff redeployment, which meant in-reach activities to hospitals were paused, clinics cancelled and inpatient engagement had to be confined to non-COVID-19 wards.
- VCS activities were also transferred online. One VCS representative thought this would be a challenge; activities were intended to take service users out of their usual environment to focus on themselves; staff were concerned that online delivery wouldn't provide that support. However, they reported that their concerns weren't realised and service delivery was effective.

Partners experienced different impacts on their referral volumes. The distribution of Naloxone kits continued through home delivery services managed by partners who saw the importance of continuing to help people stay safe during this period.

Partnership resilience

Partners reported benefitting from GMMH's guidance on how to continue to operate safely, implementation of new procedures and the increase in communications during this time. Partners who continued to work on the frontline appreciated the access to COVID-19 specific training through GMMH during the pandemic, especially training on the use of PPE.

During the vaccine rollout, GMMH provided a vaccination programme for staff which all partners were able to access. Partners reported that they gained quicker access to vaccines for their staff through this partnership offer. This access was reported to have enabled their staff to feel protected and to continue frontline service delivery.

Co-location was credited with helping to sustain close working relationships between partners. Partners also reported being able to support each other to respond to higher

demand for community services. For example, assertive outreach teams conducted joint service user welfare visits in communities with GMMH.

Partnership challenges

New staff and managers joining the partnership during the pandemic reported that it impacted on their ability to meet partners and understand the Achieve offer, which they had to learn about without visiting partners and services.

It was suggested that volunteers could perhaps have contributed more to supporting the service during the peak COVID-19 pandemic. Where some volunteers continued to support through online delivery, it was suggested that there could have been more communication around the roles volunteers were allowed to continue with and how they could remain engaged with the service.

6. Delivery of the Achieve Service

6.1 This chapter explores stakeholder experiences of delivering or working with the Achieve service since 2018. Overall stakeholders were positive about the way the Achieve service operated, their experience of using the referral process, the Asset Fund and the way the service aligned with external services. Similarly, service users interviewed described positive experiences of approachable staff, regular communication, and good aftercare. Looking ahead, stakeholders highlighted some aspects of service delivery which could be improved as Achieve continues.

Effectiveness of service delivery

Service user experiences

6.2 To establish the effectiveness of service delivery from a service user perspective, the evaluation team conducted in-person interviews with two service users at Bolton CVS and five at Salford CVS. These interviewees had undertaken treatment for a variety of addiction issues, having attended various Achieve service sessions including pre-detox, detox, self-help groups, fellowships, one to one talking therapies, group sessions, and other services including housing support and acupuncture.

6.3 Broadly, interviewees had found the service useful in helping them to achieve and maintain sobriety; the majority of those interviewed said the support offered by the Achieve service was excellent and fundamental to their recovery.

6.4 Service users had most commonly used one-to-one talking therapy, as well as the group sessions on offer within the partnership. These were reported to have been helpful, with several interviewees saying that the group sessions provided a feeling of shared experience, helping them to feel less alone in their recovery and that their problems were shared by others.

6.5 Service users said that their welcome into the Achieve service was very good, with a number saying that they had felt anxiety when they first arrived, however staff had ensured that the induction into the Achieve service was as smooth and welcoming as possible.

"The doctor referred me, and I was anxious, but they were so welcoming, they made me a cup of tea when I arrived, and you go from being so anxious to being calm." **Achieve service user interview**

6.6 Communication with service users was reported to have been excellent, with Achieve staff keeping in regular contact.

"They [Achieve staff] give you a phone call every week and they send emails to say what's going on." **Achieve service user interview**

6.7 Similarly, aftercare was largely reported to have been excellent, with service users who had completed their course of treatment reporting that they were regularly contacted by Achieve staff to check in via email and telephone, which they welcomed. Some past participants in the

programme were invited to continue joining social events held by Achieve, with one participant saying they'd been invited to go for a walk. This ongoing support was appreciated, and the social network that it provided was reported to be useful.

6.8 Whilst service user experiences were on the whole positive, interview findings indicate that there may be scope to improve the consistency of aftercare and support for those exiting the service. Some service users called for a venue or space to attend outside of set appointment times, to help to fill time with others in a positive manner and minimise the risk of relapse, particularly amongst those not engaged in employment.

6.9 COVID-19 was reported to have had a major impact on the service, and effects were reported to continue to influence the service offering at the time of reporting. Although face to face has since resumed as the predominant method of delivery, there are reported to be aspects of the service offering no longer available. Some service users said that they did not know how to use a laptop; the Achieve partnership had provided several service users with laptops to enable engagement, but some reported being unable to attend virtual sessions for this reason. One service user however reported that the partnership was funding a basic computer course to enable them to use the laptop they were provided with.

6.10 A repeatedly raised issue stemming from measures taken during the pandemic was the ongoing closure of the café at a community hub. This was reported to have been a 'lifeline' for some service users prior to the COVID-19 pandemic, with its closure reported to have had a negative impact.

"The little café hub that they used to have was amazing. There were loads of people in and it was a great get together. I think it'd be brilliant to have that back. I don't think many people come down [to the community hub] now that's closed". **Achieve service user interview**

"The aftercare is the most important thing. It's alright when you're in the rehab bubble but once you're back into the world you've got 24 hours to fill. They had a lot to offer here before COVID-19. The first thing for me [that I'd like to see happen] is opening the kitchen again." **Achieve service user interview**

6.11 Interviewees largely said that support on offer within the partnership was explained clearly by Achieve staff at the hubs. Some reported having accessed housing support through Great Places; others were aware of the various group and one-to-one therapy sessions on offer, as well as debt support and food vouchers.

"I ended up getting my flat through the housing organisation here, they [the support worker] told me how to get on to the website and [helped me] apply." **Achieve service user interview**

VCS experiences

6.12 On the whole, VCS organisations reported positive experiences of being part of (or engaging with) Achieve. However, it was noted that there was scope to expand the service offer; it was suggested that the Achieve service as a whole could expand their specialist knowledge to support certain service user communities, such as those within the LGBT+ community. While some key workers had reportedly been able to effectively provide support with this, service user feedback was

reported to suggest greater understanding would be useful. To help expand provision, one organisation delivered training to raise awareness of the substance misuse experiences within the LBGT community, covering drugs, alcohol and chemsex. This programme was reported to have been delivered to Achieve staff on a couple of occasions and shows partners are willing to increase their knowledge around specific service user groups. However, it was suggested that there was scope to make more progress, including systematizing approaches. It should be noted that this was reported to be an issue across many statutory services, and not unique to the Achieve service.

6.13 An organisation also reported receiving feedback from service users who are neurodiverse, who experienced the Achieve support groups in one locality to be too noisy and disturbing for them to continue attending. It was suggested more awareness of service user needs may be useful to enable support to cater to their needs.

Dual diagnosis service delivery

6.14 One area where there is ongoing work to further strengthen service delivery is on the liaison between the GMMH mental health services and substance misuse services. Having both services available within GMMH was considered a major advantage to the partnership and benefit to service users with co-occurring conditions. While stakeholders recognised that a lot of progress has been made in further linking up these teams, it was suggested there was still progress to be made. In particular, the criteria and referrals process between these teams was reported to create a barrier for service users; it was reported to be easier to refer a service user into drug and alcohol services than mental health services (which have higher eligibility thresholds). Dual diagnosis staff roles have now been developed as part of ongoing efforts to try to address this issue.

"Maybe one thing that has developed slower than expected is the links between substance misuse and mental health services. But they are making strong headway on that, the teams interlink a lot better than they used to do." **Stakeholder interview**

Referral process

6.15 Partners commented on several aspects of the referral process which enabled them to deliver the Achieve service effectively and welcomed ongoing adaptations to the referral process in response to changing needs. Early experiences of receiving inappropriate referrals to partner services are reported to have largely been resolved via partnership board meetings and partner visits to raise awareness of each partner's offer and eligibility criteria.

6.16 In theory, any partner can refer to any other partner if they are the first point of contact for an individual accessing the service. However, it was reportedly common for partners to receive most of their referrals from one or two other partners, where their expertise was more closely linked and their service offer was aligned with the next step on a service user's recovery pathway. The shared record system PARIS, where available, was praised for ensuring new coordinators have access to service users' previous service history and needs.

6.17 Referrals within the partnership between partners were thought to be processed more quickly, and service users less likely to spend a long time waiting for contact, than if they were accessing

multiple services from different providers outside of a partnership arrangement. Where a service user is at the point of transferring between services, for example out of assertive outreach, joint appointments with Recovery Coordinators were praised for enabling a smooth and flexible transition. Referrals between partners were also reported to remove a potential barrier of service users having to contact separate services, mitigating a risk to disengagement.

"When referrals are received, within 48 hours [partner] will have contacted the referrer and flagged their plan, and within a week [partner] will have contacted the service user, either by phone, home visit, or joint appointment. We couldn't do that timeline without the partnership. They [the service user] would have been referred in, be on a waiting list and would have had to opt in – which they probably wouldn't have done." **Partner interview**

6.18 There was also a positive attitude towards receiving repeat referrals into the service; this was viewed by partners as a sign of individuals choosing to re-engage with the service offer when they felt able to.

6.19 Service users reported the referral process to be effective, with interviewees having been referred into the service by a GP or medical professional. However, one individual said that their GP had been largely unaware of the Achieve service offering, and they felt that they had only been referred to Achieve due to the service having a shorter waiting time for access than other alcohol treatment services available locally. Similarly, it was suggested there can be a lack of communication between Achieve and the referring GP once treatment had started, with one service user reporting feeling that they needed to update their GP during appointments regarding the latest developments in their treatment by Achieve.

6.20 VCS organisations reported experiencing a more challenging referral process. It was reported that, in order to receive referrals, in some cases they had to do a lot of proactive engagement with their local Achieve recovery centres, including leafleting, meeting with centre management and attending sessions to meet key workers. Their experience in some cases was that some staff were unaware that Achieve also funded these organisations through the Asset Fund.

Alignment with external services

6.21 The level of engagement between partners and external services outside the Achieve partnership was reported to have varied depending on partner expertise, as might reasonably be expected. For example, the nature of assertive outreach means that developing links with communities and other services is essential to making the Achieve service accessible to everyone who may need support. Due to this, in-reach to hospitals, criminal justice, Probation service teams and local authority homelessness teams have been developed and sustained.

Delivery of the Asset Fund

6.22 The Asset Fund was viewed by VCS organisations as an important part of the Achieve service offer[33]. While stakeholders reflected that grant recipients were not necessarily recovery experts,

[33] The Asset Fund was delivered across the initial 2018 localities of Salford, Bolton and Trafford. Bury does not use the Asset Fund.

they were able pull in the subject knowledge of partners to assess grant applications and use the small grants to concentrate on delivering activities which provided an alternative focus and social space for service users during their recovery journey. Examples of projects delivered through the Asset Fund include redesigning community gardens and gardening activities, boxing classes, sports leadership and personal trainer awards, and art and film classes[34].

"Because your social life can really disappear when you stop drinking or when you're in recovery, we've tried to provide alternative ways to have fun. Just having something to do other than focus on your problems, be that exercise or gardening, where there's others there in recovery. We've had a couple of people go back to college to get further training. We've definitely seen an impact from being able to run these courses through the Achieve Asset Fund." **Stakeholder interview**

6.23 The Asset Fund predated the Achieve service within Salford (but not Bolton or Trafford). As such, the grant management partner worked closely with Bolton CVS and supported Trafford with implementing the scheme. While awareness was reported to have been already high in Salford, more activity was needed to promote the opportunity in Bolton and Trafford. The grant management partner was reported to have worked to raise awareness of the Fund through the partnership board, followed by some presentations for key workers within Achieve. There was a modest uptake reported in Trafford but stakeholders indicated that this may have reflected a lower level of demand within the area.

6.24 The application process was reported to be clear and accessible, and the consistent application format for different funding rounds was reported to enable organisations to apply in a time efficient way. Organisations appreciated the opportunity to attend 'meet the funder' events to learn more about the aims of Fund prior to applying. They reported that the grant management organisation was seen to be professional and approachable during the process. One partner also observed that the Asset Fund had a different approach to recognising project outcomes and impacts; they thought the Fund was realistic in accepting different methods of engagement, rather than solely counting numbers in attendance at events, and praised this.

6.25 One risk reported was that, given the Asset Fund was a grant fund, it was seen as particularly vulnerable if savings were required within the service. Stakeholders also acknowledged that the Asset Fund did not operate in the same way as other aspects of the cluster commission, as each locality had an allocated budget within the Fund, rather than a collective pot being used to address the greatest need regardless of how this split by geography. However, this set up was reported to be useful, as one locality did need to make savings during the contract and that locality's share of the Fund could be reduced to allow this to happen.

[34] There is also a separate Personal Recovery Support Fund which provides direct non-cash grants to service users to support them on their recovery journey.

Achieve service delivery – summary of key findings

- Service users reported positive experiences from their engagement with Achieve. The range of support on offer, regular communication and approachable staff, as well as good aftercare were identified as positive aspects of the service, albeit perhaps with scope for greater consistency of offer across localities
- The referral process was viewed by stakeholders to work well within the partnership and enabled service users to gain access to multiple services more quickly, and in a more coherent way, than prior to Achieve. It was seen as adaptable and flexible to change when needed
- Areas of future focus for service delivery identified included: raising awareness of Achieve among GP services; continuing to prioritise the dual-diagnosis service delivery; and adapting support offers to cater for different service user needs (e.g. LGBT+ service users, neurodiverse service users)
- While not direct delivery with service users, the Asset Fund was considered to be a valuable aspect of the Achieve offer in supporting the availability of recovery services within local communities for people exiting the Achieve service.

7. Emerging Outcomes

7.1 While the focus of the evaluation was primarily on the process of partnership development and service delivery, evidence of impacts emerging was also captured. The early evidence of impact (both clinical and operational) reported in this section is based on interviews with commissioners, partners, wider stakeholders and service users, and also informed by written case studies shared with us by Achieve partners. Additional case studies which illustrate the impact of the Achieve service on service users can be found in Annex A.

Early impacts on service delivery

7.2 One stakeholder reflection on the impact of the partnership approach and cluster commission was that it has helped to stabilise drug and alcohol treatment and recovery service delivery. One consultee reported that previous frequent changes in service providers had hindered performance and governance. Since the introduction of the partnership led by GMMH, it was felt that service delivery had stabilised, with increased confidence in clinical governance and a more robust approach to safeguarding.

7.3 More broadly, stakeholders reported being reassured by the safeguarding reporting from GMMH, which is credited with providing a clear breakdown of safeguarding incidents over a certain threshold and can be used to flag incidents or issues to discuss. This was considered especially valuable for responding to complex case reviews.

"There's no doubt whatsoever that they [the partnership] have managed to stabilise a service which was in really quite a difficult position when they took over. If you're a member of staff or service user, you're constantly on a merry-go-round of changes of service. Performance was not good. So without a doubt what we've seen is a real stabilisation of the service, it feels like it operates well. I'm really confident in their clinical governance and ability to keep clients safe." **Stakeholder interview**

7.4 Stemming from stabilised service delivery, consultees reported confidence in Achieve's performance against the National Drug Treatment Monitoring System (NDTMS) indicators. Specifically, they observed that the partnership was doing well at establishing common pathways from prisons into treatment services, based on looking at each locality and how many referrals are successfully engaged from different prisons. This was viewed as a particularly positive outcome given that the current national strategy includes a specific target on increasing the numbers of offenders entering drug and alcohol treatment services[35]. It was hoped that performance in this respect would lead to conversations and shared learning with other localities external to the partnership.

7.5 Stakeholders also commented on GMMH's willingness in certain situations to 'go beyond the contract' in their approach to service delivery where there was seen to be value in doing so. For

[35] From harm to hope: A 10-year drugs plan to cut crime and save lives (2022) UK Government. https://www.gov.uk/government/publications/from-harm-to-hope-a-10-year-drugs-plan-to-cut-crime-and-save-lives/from-harm-to-hope-a-10-year-drugs-plan-to-cut-crime-and-save-lives#chapter-3--delivering-a-world-class-treatment-and-recovery-system

example, the inclusion of the Naloxone programme in the Achieve service was considered by stakeholders to be a valuable addition to the service which hadn't been directly commissioned at the start. This was reported to be a good example of promoting harm reduction, expected to be further strengthened by the forthcoming delivery of a peer-to-peer mentoring programme to increase the numbers of organisations trained to deliver Naloxone through their service.

Early impacts for service users

7.6 Overall, partners reported that the Achieve service is having a positive impact on service users, that it consistently performs well against its targets, and informal service user feedback is generally very positive.

"We've had a lot of good feedback but obviously with the nature of this kind of work, it's very difficult to judge, because ultimately it's not always about whether the service is delivered in hospital or by Achieve, it is dependent on how a patient tries. They felt supported that they've stayed off alcohol and drugs for several months and that they felt that they've been able to just ring Achieve when they are having a bit of a blip. We've not really had much in the way of negative feedback from our service users and the vast majority said that the team work well for them." **Stakeholder interview**

7.7 Partners develop case studies illustrating how service users have engaged with Achieve, the support provided and the outcomes achieved[36]. Some of these case studies share service user voices while others are written by their main support workers. The case study boxes within this chapter reflect the support some of these service users have received from Achieve and the impact this has had on their recovery journey. From these case studies, it is clear that service users often have complex needs, both clinical and social, which require ongoing support from multiple partner agencies. Most case studies referred to service users continuing to remain engaged with Achieve once their treatment pathway or course had ended, to continue to receive support when needed.

7.8 The nature of the partnership service, which offers a variety of support on entry and throughout treatment, is considered to exceed the offer available elsewhere. For example, prior to the Achieve service being introduced, there was reported to have been a risk that young people would 'fall through the gap' in support, with a reported lack of awareness about other relevant services available for service users to be referred into. However, it was reported that there is now awareness that young people can be referred to Early Break as part of the partnership, minimising this risk and enhancing the offer available to young people.

[36] A selection of 14 case studies were shared with SQW by the GMMH / The Big Life Group client group, Additional case studies are presented in Annex A.

Case Study – Salford Royal Hospital – High Impact Substance Misuse Team[37]

Over six months in 2020 Liam[38] had presented five times at Salford Royal Hospital and been admitted to the hospital on several of these occasions with various alcohol misuse related conditions. These included cirrhosis, jaundice, and alcohol hepatitis. He had a long history of not engaging with services and had problems with rent arrears.

Liam was referred to the HISMT and housing officer for support. He stated to engage well with face-to-face appointments and online psychosocial intervention groups to begin his recovery and address his housing issues. Despite having to be admitted for emergency hospital care, Liam re-engaged on discharge. He completed several psychosocial intervention courses and an in-person Intuitive Thinking Skills course through Achieve.

7.9 Partners' felt that an early outcome of the Achieve service was the success in establishing a trusted brand name and in re-engaging individuals within the community who had become disengaged through previous changes in service providers and service offers. Through the assertive outreach teams, who explain the partnership offer and the multiple services available, the partnership was praised for building trust with individuals who had moved away from services, which is reported to have proved vital in re-engaging them with a support offer.

"A big part of it is, because we're going to their homes, or on the street, we're building up a trusting relationship with them, it's not a 'here's an appointment come and see us' approach." **Partner interview**

7.10 Linked to this, service users were reported to have also received home visits where needed, for example if they had limited mobility or agoraphobia.

7.11 One partner described how a service user had reported that the relationship they had built up with Achieve staff meant they didn't have to keep going over their negative history, and that the relationship with the coordinators encouraged them to move forward positively.

Case Study – Big Life Group - Assertive Outreach[39]

Lisa[40] was referred to the Achieve Assertive Outreach Team by the Community Mental Health Team after she disclosed her alcohol use and agreed for referrals to be made. A referral was also made to the Home Treatment Team who had agreed to start providing mental health support.

[37] Case study provided to SQW by GMMH/Big Life Group client group
[38] Name has been changed to ensure anonymity
[39] Case study provided to SQW by GMMH/Big Life Group client group
[40] Name has been changed to ensure anonymity

Lisa was very anxious about the process and what was expected of her. A home visit was undertaken by the Assertive Outreach Team to introduce the service and what support was available. Lisa was then contacted 1-2 times a week to check in with her and offer reassurance.

A referral was made into structured treatment and a worker contacted her on the morning of her assessment and afterwards, to offer her emotional support and answer any questions she had. The Assertive Outreach Team liaised with Lisa's mental health practitioners throughout so that all agencies involved were aware of what support she was receiving.

Lisa engaged with her assessment with Achieve and attended her initial appointment. She was then referred to the psychosocial intervention team and has started to attend detox preparation sessions.

7.12 More direct links into mental health services were also considered a positive outcome of the Achieve service having a specific clinical mental health lead. While challenges were identified in the dual diagnosis service delivery, the links into GMMH through the partnership were considered to offer benefits for service users requiring mental health support.

7.13 In terms of exiting the service, volunteers and VCS staff shared examples of Achieve service users who have progressed through treatment and recovery and gone on to volunteer or work with Achieve or set up their own community support services. By doing so, these individuals with lived experience are contributing to the range of support services available within their local communities. It is likely, although not evidenced in this evaluation, that the support, training and relationships built up through their engagement with Achieve have contributed to their ability to achieve these positive outcomes.

"People see people running the groups who have been through the service. There's value there and that works really well too. People tell us that this was a massive part of keeping them going, seeing someone with a job at Achieve who used to be there [in the service]." **Stakeholder interview**

7.14 The Asset Fund was praised for helping VCS organisations to work with people in the recovery community, including to support people on their recovery journey to engage in activities within their local communities, which in turn is reported to have helped to reduce the stigma that can be faced by people recovering from substance misuse. Another organisation referenced supporting individuals through their recovery journey who went on to gain employment with their organisation. A similar process of transitioning from service user to service employee has been evident within the community development teams within Achieve.

Early impacts on commissioning and partnership development

7.15 In terms of the partnership model, it was suggested that a partnership arrangement is easier for commissioners to manage through liaison with one lead provider contact rather than multiple direct contracts.

7.16 There was also evidence of individual partner organisations developing through being part of the partnership. Smaller partner organisations reported that they have improved their approach to person-centred delivery, widened their knowledge and networks of associated service offers, and improved their training offers for staff. These smaller partners are reported to have been able to benefit from wider promotion of their service offer, which in one case is credited with helping an organisation to expand. Linked to this, that organisation also reported benefitting from service users being more informed about what is on offer and what is asked of them upon entering the service.

7.17 The cluster commission was credited with helping to overcome an 'us and them' mentality among localities, with reports of a collaborative approach to addressing need. One partner reflected that the continued effectiveness of the partnership model provides the evidence partners need to pursue further opportunities together (e.g. a collective partnership between Bolton and Salford to deliver sexual health services).

7.18 The cluster commission approach was also reported to have impacted the localities' responses to more recent opportunities. Further examples of cluster commissioning of other local services have emerged since the Achieve contract. With additional grants for 2021/22 and 2022/23 to improve services in line with the ambitions of the 2021 Drug Strategy, the four localities came together to work out how to collectively develop their service offer to use this new investment. It was reported that working together on the application process, service offer, and allocated finance was a much easier and more efficient process than it would have been if working independently.

Emerging outcomes – summary of key findings

- While not the main focus of the evaluation, evidence of impacts on service delivery, service user experience, commissioning and the partnership model were collected
- The partnership was reported to have contributed to stabilising drug and alcohol recovery provision, operated with robust approaches to safeguarding and performance management, and ensured overall that the service met its national performance targets
- Overall, the research found service users have been positively impacted from the holistic service approach, the assertive outreach into communities and the wrap around support through the Asset Fund for wider recovery activities
- Smaller partner organisations reported having benefited from wider promotion, increased capacity and access to training
- The experience of commissioning and delivering Achieve is reported to have helped to embed collective working among commissioners and partners, leading to similar approaches being undertaken on recent contracts.

8. Replicating the Partnership Model

8.1 Having explored reflections on the cluster commission approach, the effectiveness of the partnership and the delivery of the service, this chapter reports stakeholder views on the extent to which the cluster commission approach and partnership model could be replicated across other localities. It also reflects on interviewee expectations regarding the impact recently announced additional national investment might have on local drug and alcohol treatment and recovery services.

Replicating the model

8.2 Stakeholders reported that the extension of the Achieve contract into Bury in 2019 indicates the replicability of the Achieve service, albeit on a slightly different scale. There was widespread recognition among stakeholders that the Achieve service offer contains novel treatment and recovery activities which other localities could benefit from, such as the assertive outreach service, community development activities linking in with the VCS, and the involvement of volunteers with lived experience.

8.3 While stakeholders were positive about the potential to replicate the model, they did comment that prior investment made in Salford on drug and alcohol treatment and recovery services, along with the previously operating Achieve Salford service, had provided a solid foundation from which to expand the Achieve service and launch a partnership model. This foundation provided an advantage that other localities may not have. Regardless, stakeholders offered useful insight into the other enabling factors which may need to be in place to support a similar model elsewhere, as well as the challenges that may need to be overcome.

Enabling factors

Commissioning and bid assessment

8.4 The formation and continuation of a pan-locality commissioning team was considered a key component of the cluster commissioning model. Stakeholders indicated that having a lead local authority to oversee the tendering process can be a useful enabler, alongside agreement about how other localities are expected to input.

8.5 It was suggested that all participating localities should engage in a combined needs assessment, in order to be clear on what is being asked of providers in each area; we would suggest that following a consistent approach may be a possible alternative approach if a combined assessment isn't feasible. Interviewees recognised that specific services commissioned in one locality do not necessarily have to be commissioned in another within the cluster, as long as all needs are met via a comprehensive package.

8.6 When assessing bids, it was suggested that representatives from each participating locality need to be involved, and there needs to be a transparent assessment process.

"The process side of things needs to be really sharp. You need all the local authorities to have an agreed approach, to all be on board. You need to do a combined needs assessment, be clear on what you're asking for and what's allocated where, who's leading the process and how people are going to input." **Stakeholder interview**

Lead provider role

8.7 Stakeholders observed that to replicate the partnership model, a lead provider would be needed, with substantial capacity and expertise to manage the governance of the contract, as well as the logistics of the service transition period (e.g. TUPE of eligible existing staff to the new provider, establishing any new IT systems, arranging the safe transfer of service user records). A larger provider could potentially also support the co-location of some partner services.

8.8 Regular, planned partnership and contract meetings were thought to be valuable in ensuring the lead provider has oversight of service delivery, while giving partners a clear avenue to raise any issues. Such meetings were also considered to be helpful in enabling knowledge sharing and building understanding of the service offer as a whole. The ability and capacity of the lead provider to offer access to training was also considered an enabling factor in ensuring the quality, consistency and safety of the partnership offer.

8.9 It was also suggested that having a partnership model led by a clinical lead provider with subcontracted partners from recovery services within the VCS sector was a good way to provide a holistic offer. Having a clinical lead provider was thought to help partners to more efficiently access clinical input for their complex cases, which provided reassurance to non-clinical partners that they were supporting their service users across all their needs.

"It's about having a shared value base, proving a diversity of team can function, rather than a full NHS led service, that's what Achieve has done well." **Partner interview**

Relationships with wider stakeholders

8.10 A high level of engagement from wider stakeholders (e.g. actively referring in and engaging in Drug and Alcohol Working Groups) is also deemed necessary for model replication. The promotion of the service to other organisations, specifically statutory services, and numbers (and frequency) of referrals received from them to partners were seen as crucial in determining reach and impact of the service. While Achieve benefited from partner staff having existing contacts and networks with some statutory services, this was an area where stakeholders identified a need for future focus, specifically in how statutory services can be engaged within partnership board meetings.

Potential challenges in replication

Commissioning

8.11 There was stakeholder acknowledgment that a cluster commissioning approach may limit the types of providers able to bid. Providers with the capacity to operate at scale across several

localities, deemed to typically be larger organisations, would potentially be better able to respond this type of tender than smaller scale providers. However, it was suggested that these larger providers may prefer to work with organisations with whom they already have relationships, rather than linking in with local VCS organisations. This risks limiting the service offer and/or jeopardising the viability of smaller local providers. Although not specifically mentioned by stakeholders, we would suggest it may also risk local knowledge being lost, with additional lead in time required for any new (previously out-of-area) providers to build up local intelligence, contacts and credibility.

"I think it works well with a lead provider model, where you've got a big organisation who can work through all the logistics that need organising, but then have some bits which specialist skill sets from charities and other organisations can deliver. Without that, it rules out smaller organisations without the back office functions to deliver." **Stakeholder interview**

8.12 This was seen to conflict with increasing focus on ensuring services delivered to local populations are locally informed, and desire to have partners who are already known locally and engaged in partnership working. To address this risk, there was a view that commissioners could play a role in actively linking up lead providers interested in bidding with local VCS organisations where tenders require subcontracted elements of service delivery. This was seen as a way to support lead providers to access appropriate local expertise within a short tender timeframe. It was noted, however, that subcontracting multiple elements of a service to multiple local partners may not be feasible for a lead provider to manage.

Addressing different demographic needs within the cluster

8.13 Stakeholders highlighted a need to ensure that a cluster commission reflects the service needs of each separate participating locality. Stakeholders were split however in their views on whether cluster commissioning could adequately address the service needs of localities with significantly different demographics. It was felt that the Achieve model had managed to deliver across the Bolton, Bury, Salford and Trafford footprints, despite differing population needs. This was credited with being due to thorough locality needs assessments being undertaken and used at the commissioning stage, as well as the flexibility of the lead provider to respond to different needs as they arise.

Managing change

8.14 Interviewees reported that a change of provider can be unsettling for some service users, causing anxiety or disengagement. Stakeholders highlighted it was important for any new partners delivering a service to make sure service users know any change in delivery/provider will not impact negatively on their care. While this is a risk in the conclusion/transfer of all contract types, it is worth highlighting to ensure service users remain engaged in their recovery.

Introduction of Integrated Care Systems (ICSs)

8.15 The formal introduction of ICSs and associated responsibilities from July 2022 is expected by interviewees to change the commissioner-provider relationship. Substance misuse treatment and

support will not fall within the remit of ICSs, although many other interrelated services will. Stakeholders thought that this risks putting providers who are not part of ICSs at a disadvantage in terms of relationship building and profile with commissioners and local policy makers.

Reflections on the new investment

8.16 Stakeholders shared their thoughts on the opportunities and challenges the new investment in drug and alcohol treatment and recovery services may create. These can be summarised as:

- **Increased service capacity –** any additional investment was considered a positive move which would help services to increase the numbers of people in treatment services from a range of service user groups.
- **Enhanced work with the criminal justice system –** it is anticipated that the new investment will help improve the criminal justice pathways to treatment, improve the quality of interventions on offer and maintain and expand relationships between Achieve services and the Probation service. However, there was a concern raised that due to the constraints facing the criminal justice system it may be difficult to evidence outcomes.
- **Using new investment strategically –** stakeholders recognised that there was a need (and opportunity) to go further than simply expanding existing service offers, to: proactively target underrepresented groups in treatment services; improve primary prevention; increase community specialist teams (e.g. community detox services); and support wider health improvement programmes.
- **Workforce challenges –** with new investment available to services across England and Wales, stakeholders were very aware that there was a real risk of skills shortages, as existing staff have opportunities to move into new roles, creating vacancies elsewhere in the service. This was also a concern highlighted in the Black review which reported that '*a prolonged shortage of funding has resulted in a loss of skills, expertise and capacity from this sector*'[41].

[41] Black, C (2020) Review of Drugs. Executive Summary. https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/897786/2SummaryPhaseOne+foreword200219.pdf

Replicating the model – summary of key findings

- Stakeholders reported that the extension of the Achieve contract into Bury in 2019 indicates the replicability of the Achieve service elsewhere, albeit in a neighbouring authority and on a smaller scale.
- While stakeholders were positive about the further potential to replicate the model, they did comment that prior investment made in Salford on drug and alcohol treatment and recovery services had provided a solid foundation from which to expand Achieve, an advantage that other localities may not have.
- Factors considered important in enabling the model to be developed elsewhere included:
  - Leadership from the lead local authority, with clarity on inputs and a transparent needs assessment
  - A lead provider with sufficient capacity to manage governance and subcontracts
  - A partnership which has diversity of clinical and non-clinical support services

  Potential challenges identified in replicating the model include: ensuring the scale of commission doesn't exclude smaller locally based organisations from being involved; addressing different demographic needs; and managing the system change to ICSs.

  New investment was considered to be a positive development in allowing partners to maintain and expand services, however there was an acknowledgement that service development needed to be strategically linked to wider public health aims and that there would be challenges around recruiting to expand the workforce.

9. Conclusions and recommendations

Conclusions and reflections

9.1 This report presents an overwhelmingly positive narrative regarding the Achieve partnership. The ambition of the partners, in coming together to deliver a complex, multifaceted service to support and treat people experiencing substance misuse issues, across multiple localities with different contexts and populations, was huge. The approach was novel in several ways; not only in its pan-locality commission, but also in the way the partnership has operated and the sharing of information, training and good practice across the partners involved. This report has set out in headline terms the experiences and reflections of key stakeholders in the partnership, and these are on the whole very positive and encouraging; partners should feel proud of what they have delivered.

9.2 Stakeholders welcomed the partnership approach, crediting it with being the 'right way' to deliver a drug and alcohol recovery service, reflecting the often multifaceted and complex needs individuals present with, and credited with enabling the service to meet those needs holistically. This has required a variety of offers to be available for individuals to access; providing this has required a range of skills and competencies, as well as sufficient capacity across the partners, to ensure people can access what they need in a timely manner. The Achieve partnership is recognised for having been able to deliver this, and that is welcomed by stakeholders.

9.3 The findings indicate that there was not a high level of inappropriate referrals, which was reported to indicate the effectiveness of the 'no wrong door' ethos and referrers' understanding of the service offer. Sustaining this understanding, including regarding some of the more specialist or localised offers, is likely to prove key going forward to overcome any loss of knowledge over time or associated with turnover.

Partnership model

9.4 The 'lead provider' model of the service is reported to work well, with clear lines of reporting and accountability, and GMMH possessing the necessary skills, organisational resilience and scale to successfully lead the partnership. GMMH should also be praised for efforts to upskill others within the partnership. In this respect, the service is effectively helping to build capacity amongst Greater Manchester's VCS, which is reported to offer multiple potential benefits outside of the Achieve service. These wider benefits have not been possible to capture within this report, but there is a sense that the partnership is leading to benefits for partners and the service landscape, for which GMMH in particular is to be credited.

9.5 Behind this lies a culture that is reported to have encouraged knowledge and information sharing across partners. Achieving this type of open, collaborative culture could have been challenging, particularly in an environment in which funding is constrained and there are limited contracts and opportunities available. However, the Achieve partners spoke of effective collaboration, with a shared focus on improving service user outcomes.

9.6 The evidence presented in this report highlights that the service is bigger than the sum of its parts; there is a clear sense that through working together the service partners can (and do) add more value to service users. Partners reported benefiting from involvement in early board meetings, crediting this with raising their understanding of the wider offers available within the service, as well as helping to cement a sense of shared endeavour. Taken together, these findings indicate that structural processes have helped to build collaboration amongst partners, but the culture and behaviours of GMMH as lead provider (in particular) have helped to reinforce this further. This latter point is important; the findings indicate that it is not just *what* the service does that is important, but also *how* it does it, whether that be about internal training and development, or the frontline services and support it provides.

9.1 There is however a note of caution regarding how the 'ownership' of the service is perceived externally, which partners (and others seeking to replicate the model) may wish to consider. Although not a widely held view, there were reports from some stakeholders that the service can at times be seen as GMMH's, risking obscuring the vital roles played by others in the partnership. The findings indicate that there may be scope for more work (or refresher activity) to be undertaken to clarify the extent of the partnership and who is involved within it.

9.2 Service user feedback was broadly very positive about the Achieve service. Different partner offers were felt to be joined up, and service users welcomed the support and treatment they have been offered. That said, there may be scope for some refinement or expansion of offers available, and the feedback indicated scope to spread good practice across different localities.

9.3 This latter point is important; the service was praised for working in a tailored way to meet differing needs in each of the localities. However, it was suggested that the offer's tailoring in each locality may mean some service users receive a more rounded or different offer to others. Linked to this, it may also be useful for the partners to consider whether (and where) there may be scope to raise partner awareness of the offers of other partners, to enable confident internal referrals and signposting based on informed discussions with service users. This point is important; partners and stakeholders referred to the Achieve partnership model as being 'the right way' to deliver this type of service, but called for more opportunities to come together and share with partners, to improve and maximise value of the partnership, particularly in light of disruptions caused by the COVID-19 pandemic.

9.4 Another element of the model is the use of GMMH's PARIS information management system, which offers shared access to clinical records across relevant partners. The positive feedback from partners using the system indicates that this is a useful mechanism; indeed, the calls for additional functionality and access by others reflect this. Some went further however, with calls to capture outcomes and narratives systematically.

Commissioning model

9.5 The model was always anticipated to offer efficiencies. Whilst we cannot verify whether or not efficiencies have been achieved within the scope of this evaluation, stakeholder consultations indicate that efficiencies have been realised at both provider and commissioner levels. This is a positive finding regarding the cluster commissioning model, and indicates there may well be merit in seeking to replicate this approach elsewhere. With this in mind, it may be useful for the

partners to consider conducting some kind of economic assessment, to identify savings realised through this joined up, pan-locality model. In addition, other localities (both commissioners and providers) may benefit from understanding how the model was set up and has operated. This could offer opportunities for partners to raise their profile and disseminate learning for greater good.

9.6 It is important to note that stakeholders welcomed Salford City Council's role as 'lead commissioner' during the tendering process, with their experience in commissioning this type of service credited with providing a solid foundation to build on across the cluster. It was suggested that others seeking to replicate this type of cluster commissioning approach may also wish to consider whether they have a commissioner able (and willing) to take on this role, including considering the potential time commitments required.

9.7 The spread of the model to Bury, with tailoring to suit local circumstances and the benefit of being able to observe the partnership before developing their specification, again provides evidence that the partnership model can be spread. Whilst this was in a neighbouring authority within Greater Manchester, there is no obvious reason why others further afield couldn't also seek to adopt the approach – either the cluster commissioning element or the partnership model (or both). The expansion to Bury also benefitted from commissioner willingness to share insights; how the partnership operated has proved key, but commissioner behaviour has also proved to be of vital importance in facilitating the model.

9.8 In terms of reporting, monitoring reports were deemed to be effective in meeting commissioner need, with effective contract management by GMMH to meet national and local monitoring requirements. However, it was suggested that provision of narrative alongside quantitative data may be useful in providing commissioners (and possibly others) with a richer understanding of how the service is performing.

Policy and provider landscape

9.9 The service has been dependent on the viability of the local VCS, with a range of offers, expertise and capacity required, as well as in-depth understanding of local communities, needs and assets. The cluster localities were considered to have been well positioned in this respect, but this may prove to be more challenging in other localities seeking to replicate the partnership model.

9.10 In addition, the reliance on VCS partners to deliver elements of the contract risks challenges relating to broader resilience issues to which the VCS is particularly vulnerable; for example, the ongoing backdrop of increasing demand and rising inflation may threaten VCS organisational sustainability. Whilst this type of relatively long-term and sizeable contract may offer some way for partners to overcome these challenges, the broader fragility of the sector is not to be underestimated, particularly post-pandemic. The extent to which lead providers can integrate depends on pre-existing VCS services in each locality. Each locality invests different amounts of money into their services and there was a concern that in some localities elsewhere in Greater Manchester, the VCS was less well developed and organisations may lack the experience and/or capacity to engage in a model such as that adopted by Achieve.

9.11 In addition to funding and organisational viability, the findings indicate that partners seeking to work in this type of arrangement benefit from local networks and pre-existing relationships. Potential and actual partners also need to adopt a culture of sharing and willingness to work collaboratively. This lack of protectionism was evident across Achieve partners, and they are to be praised for this; indeed, some partners called for more opportunities to share with and learn from others within the service.

9.12 When the Asset Fund is considered, this was seen as useful and welcomed, particularly by those organisations in receipt of funding, who also praised the application process. The Fund was seen to be enhancing the service offer and strengthening the local VCS. Salford CVS played a critical role in Asset Fund process management, with suggestions that other locality CVS organisations could perhaps also have more of a role to play in future funds, particularly in providing local insight. That said, the process for allocating and managing the Fund was perceived to have worked well overall, with wide representation on the allocation panel.

9.13 Another reported added value of the partnership's work has been its community development activity, including work to support and develop volunteers with lived experience of treatment and recovery services. This was seen to have worked well by those involved and volunteers themselves, as well as other stakeholders, with calls from some for even more training offers to be available for peer volunteers, including around the day to day role of volunteering, such as motivational interviewing techniques and dealing with complex service users. This indicates appetite to sustain engagement with the service.

9.14 Looking forward, there remains uncertainty regarding the full implications of the recent policy changes. In addition to the national drug strategy, the recent passing of the Health and Care Act 2022 may offer both opportunities and threats to the service. Whilst we understand that commissioning of drug and alcohol services will not shift from local authorities under the forthcoming changes, the introduction of ICSs and associated Boards and Partnerships represents a key change to the broader health and care landscape. It remains unclear whether there may be implications for provider profiles through being visible within ICS arrangements; if this is the case, then having a clinical lead partner may well prove even more important going forward.

9.15 Another way in which Achieve may be to some extent ahead of the curve is in respect of the provider partnership working, with moves towards provider collaboratives also afoot. The partnership may well offer useful learning and insights for others in this respect.

9.16 The National Drug Strategy offers more funding for recovery and treatment, along with a shift in emphasis nationally from punitive approaches towards support. However, Greater Manchester was considered to be ahead of the curve on this. It remains unclear currently whether the policy changes will enable expansion of existing offers, or whether there may be moves towards more strategic commissioning and links with wider public health aims more explicitly. Achieve is already helping to realise wider aims for service users; the service may be well placed in this regard, but opportunities and any shifts in emphasis should be monitored.

9.17 Looking forward, the end of the current contract period is not reported to be looming as a major risk or concern for partners. Recent reassurances regarding continued involvement of all four localities within the cluster have sought to allay some of the concerns raised regarding

sustainability, with partners largely feeling optimistic about partnership viability. Those involved are keen to continue their existing approach and sustain the focus on delivery of the service aims.

Recommendations

9.18 Below is a set of recommendations informed by the findings presented throughout this report. These are intended to strengthen the Achieve partnership and service model further.

Awareness raising, understanding and training

Recommendation 1: Maintain partnership (and wider stakeholder) awareness and understanding of partner offers. Partners were complimentary about the early Partnership Board meetings, which they praised for helping to develop their networks with partners and their understanding of partner offers. However, the evaluation findings indicate that efforts to ensure understanding of what other partners can offer, their eligibility criteria and role within the partnership could usefully be revived. This was seen as important in supporting informed decision making by service users about onward signposting and referrals within the partnership, and we would suggest this may also help with further building a sense of being part of a joint endeavour.

Linked to this, it may also be useful to raise understanding of the diversity and range of the offers amongst potential referrers, to ensure they understand the different support options and pathways available.

Recommendation 2: Consider introducing standardised partnership inductions for new staff. Partly linked to the point above, it was suggested that new staff joining partner organisations (to work on recovery or treatment) would benefit from face-to-face induction activities, including visits to meet colleagues in other partner organisations. We recognise that COVID-19 constrained ability to offer face-to-face partner inductions over the past couple of years; that said, there appears to be appetite for such activities to recommence. We suggest that the partners consider whether a standardised induction package could be developed for new joiners, to ensure a consistent core of activities and information are provided. This could perhaps also include specific training relevant to working on the service, to ensure continued consistency and economies of scale.

Information sharing and shared records

Recommendation 3: Consider whether narrative outcomes can be captured systematically alongside monitoring data. PARIS was recognised as a clinical monitoring and shared records tool, and in this respect was deemed to be a helpful feature of the partnership. However, those who are unable to access it reported a lack of mechanism through which to share information about service users in a standardised system. Others called for scope to capture narrative outcomes and 'stories' in a standardised way, and for this to be readily available for commissioners. With this in mind, we recommend the partners consider whether and how monitoring and reporting could be expanded, without creating additional undue burden. This

might perhaps also involve reminding partners of the functionality and remit of the PARIS system, to manage expectations about its capabilities and intended use.

Recommendation 4: Consider how to further expand service inclusivity. The service was praised for its offer. Some stakeholders suggested partners could consider how to further respond to diverse needs of different service user groups, including those from the LGBT+ community and those who are neurodiverse. The findings indicate local VCS or stakeholder organisations may be able to provide specialist input in regard to specific issues, which may prove useful. This may also include exploring what is seen to work well in one locality and whether this could be expanded out into other parts of the cluster.

Recommendation 5: In any future Asset Fund rounds (or equivalent), consider whether other CVSs could perhaps play a greater role. Selection panels were reported to have been wide-ranging and effective, but it was indicated that there may be scope for CVSs to play a greater role in any future rounds, working closely with Salford CVS to capitalise on their understanding of assets and needs in specific localities and communities.

Recommendation 6: Consider whether (and if so, how) subcontracted partners can be involved in meetings or engagement with commissioners. It was suggested that including subcontracted partners in some commissioner-provider meetings could be helpful, to enable commissioners to discuss any queries directly, hear the narrative around the service delivery and 'get the story behind the numbers'. This may however need careful management and consideration as to how to effectively make this work and ensure the focus remains on the entire partnership offer within a particular locality.

Linked to this, but separate, we also recommend exploring whether efficiencies could be realised through sharing information about which partners or individuals are due to attend key meetings locally, to minimise duplication. This would again potentially need careful management however, recognising partner organisations may be wearing 'dual hats' if representing the partnership in wider meetings.

Evaluation and co-design activities

Recommendation 7: Consider whether (and how) to capture evidence of efficiencies associated with the model/contract. Anecdotal reports indicate that efficiencies have been realised at provider and commissioner levels. However, it has not been possible within the scope of this evaluation to fully evidence these or to seek to monetise them. It may be worth assessing the feasibility of this approach and who the intended audience for any such fundings would be (and what would resonate for them evidence-wise) – which might include commissioners within or outside of Greater Manchester or the existing cluster. This may prove useful in making the case for replication of the service or commissioning model elsewhere.

Recommendation 8: Consider whether there may be merit in introducing co-production activities or involving service user representatives within strategic/planning meetings. Service user voices can prove particularly powerful, and introducing mechanisms to enable service users to effectively inform future provision can be rewarding for those involved, deliver wider benefits for service users and provide a new perspective to inform decision making. This

may be something the partners may want to explore how or whether to incorporate within partnership governance arrangements. Careful planning and support would be needed to ensure this can be done effectively and serve to empower those involved, and a shared vision for (and understanding of) coproduction would be required.

Reflection and celebration

Recommendation 9: Raise partner awareness of what is funded through the Asset Fund and how it may be useful to Achieve service users. This could also focus on increasing understanding regarding how to signpost or refer into the funded organisations and details of their eligibility criteria.

Recommendation 10: Build in time and space for reflection and celebration. To further strengthen partner understanding, and to share insights from this evaluation, we recommend that space be put aside to bring partners together to reflect on their experiences of what's going well, what's going less well or opportunities for improvement, and their reflections on what's happening in the wider context and what the implications of this might be for the Achieve service and commission. In any communication regarding partnership successes which may arise, we recommend making links to current targets and policy priorities explicit, to likely increase others' interest in learning from the Achieve model.

Annex A: Case Studies

A.1 The following case studies were shared with SQW by Greater Manchester Mental Health Trust and The Big Life Group, on behalf of the Achieve partnership, for the purposes of the evaluation. These case studies provide further evidence (in addition to the two examples from The Big Life Group and Salford Royal NHS Foundation Trust presented in Chapter 7) of the impact the Achieve service has had on individuals engaging with the service, and help to evidence the holistic nature of the Achieve service offer. All names have been changed to ensure anonymity.

Case Study – Early Break – Holding Families

Caroline was referred to Holding Families by Children's Social Care. She had been minimising her alcohol use and her children had been reporting regular incidents of their mother being intoxicated.

Caroline engaged in a recovery programme and completed an in-stay detox. She had a bracelet attached to monitor her alcohol use and received psychosocial intervention via Achieve to maintain her abstinence. She gained an in-depth understanding of the impact of her alcohol misuse through group sessions, 1:1 sessions and family meetings.

At the end of her engagement with Early Break, Caroline was no longer using alcohol, had been abstinent for over 8 months and was no longer using anti-depressant medication. She continues to receive support from Achieve.

Case Study – Thomas – Residential support

Jenna was referred to THOMAS as she frequently used cannabis and cocaine, engaged in heavy drinking following the breakup of her relationship, and was experiencing difficulties living at home. At the time of her referral she was 8 months pregnant and the plan was for her to stay at THOMAS and access Group Meetings following the birth of her baby.

Jenna has complex needs. She participated in group work addressing behaviours associated with addiction and learning about the disease, relapse prevention, how to manage feelings, and how to develop new skills for resolving conflict. She also engaged in 1:1 sessions on benefits, emotional and recovery support. Support with her physical health has also been essential.

THOMAS supported her to have regular contact with her child (currently in foster care) and face-time contact nightly, which has been successful in building the bond between them.

As she continues in her recovery, Jenna is more aware of her triggers for substance misuse and continues to access recovery support.

Case Study – Intuitive Thinking Skills – Intuitive Recovery Course

Riley started to excessively use alcohol at 21, to deal with the emotional pain from a relationship breakup. She said she realised drinking alcohol had become a problem when she felt "unable to conduct a normal relationship" without alcohol. She also reported that she had lost friends because of the way she behaved when drinking alcohol. This made her feel ashamed and embarrassed.

Riley tried self-discipline and other efforts to abstain, but these attempts were not successful. She self-referred to local area alcohol services and then was referred on to Intuitive Thinking Skills to complete the Intuitive Recovery course.

Since completing the Intuitive Recovery course, she has remained abstinent and sees the course as a very important part in this. Every couple of weeks, she re-reads the literature and student course book "which boosts me ... It never leaves my bedside table. It's not too intense and wordy and makes so much sense".

Case Study – Great Places – Achieve Floating Support

Michael had his own home, but due to his active addiction he didn't have any furniture and did not pay for gas or electricity, as these were not priorities for him. Michael was completing a detox programme with THOMAS on a 3-month placement. He was referred to Great Places as he needed support to resettle back into his property following his detox.

He worked with his Housing and Wellbeing Officer on his strengths and challenges; it was identified that he would feel better able to remain abstinent if he had a settled home and access to community support. They discussed all areas of his wellbeing: home, finances, social, physical and mental health as well as immediate needs such as furniture, gas and electric and food, as part of his resettlement.

Michael's Housing and Wellbeing Officer applied to the local council for a furniture package to coincide with his discharge date, and was able to obtain most of the items requested as well as a food parcel as part of the council's emergency assistance. Michael also received details of online support groups within the community to focus on relapse prevention in addition to the Achieve Recovery Support Groups.

Michael has now successfully resettled in his community and has been discharged from floating support.

Case Study – Salford Royal Hospital Trust – Alcohol Care Team

Mark was an out of area patient and unknown to Achieve until he was admitted to Salford Royal Hospital after having an alcohol withdrawal seizure while in police custody. Mark had a history of alcohol dependency and drug misuse.

Alcohol withdrawal treatment was started to prevent further seizure activity, and Mark was started on the Clinical Institute Withdrawal Assessment for Alcohol pathway, as he was showing mild to moderate withdrawal.

The Alcohol Support Nurse arranged for Mark to be transferred to a custody suite with medical cover, and provided the withdrawal treatment and prescription sheet for a local paramedic and custody staff to follow. Mark was then discharged with his withdrawal treatment plan back into police custody, and SRFT released an acute medical bed for further emergency cases.

Case Study – Intuitive Thinking Skills - Intuitive Recovery Course

Sam first recognized that his addiction was posing problems in his personal life during lockdown. He said he was becoming more interested in getting drunk than attending work or doing sports. He found out about the Intuitive Recovery course through his substance misuse key worker from GMMH. The Substance Misuse Rehabilitation Team made a referral for him after calling the crisis helpline.

Sam received prescribed medications from his Community Mental Health Team doctor to manage his mental health difficulties related to his drinking. He felt he needed the structure and tailored input from something like the Intuitive Recovery course. He had considered Alcoholics Anonymous but was unsure as to whether it was right for him.

Since completing the Intuitive Recovery course Sam has reduced his alcohol intake substantially and returns to his course materials when he is having a difficult day. If an issue arises he now feels confident talking to his Care Coordinator about it.

Case Study – Big Life Group and GMMH – Assertive Outreach and Dual Diagnosis services

Alice was opiate and alcohol dependent with unmet physical and mental health needs when she was referred to the Achieve service. She had lost contact with her family and children due to her substance misuse and was homeless, living in temporary accommodation. Her main recovery goal was to become abstinent from drugs and alcohol and to have her own tenancy - which she felt would enable her to re-establish a relationship with her family.

The Assertive Outreach team completed a referral to the GP Inclusion Team during a home visit and arranged for the outreach nurse from the GP team to meet with the team member and Alice at her home for an assessment. Support was offered face to face, meeting Alice where she was at, using a person-centred approach which enabled her to build trust with all the professionals involved.

The Assertive Outreach team member and the Dual Diagnosis Practitioner assessed, advised and acted on the risks of Alice's alcohol and drug use during each appointment. Alice's mental health needs were assessed by the Dual Diagnosis Practitioner and visits to her home were supported. She suffered from depression and anxiety and was supported to engage with the GP team for prescribing. Ongoing emotional support was provided by the Dual Diagnosis Practitioner to help increase her self-esteem, confidence and assertiveness.

Alice has now completed an alcohol detox and has ceased using heroin and crack cocaine. She is engaging positively with psychosocial interventions, relapse prevention and mutual aid meetings in the community. She has now developed the confidence needed for her to access counselling with the Manchester Action on Street Health (MASH) and is engaging fully with GP services independent of the Assertive Outreach support.

Alice has been offered a tenancy and will be moving into her new home in the near future. She will continue to receive support from the local Council supported tenancy service for the duration. She is now in regular contact with her family.

Case Study – Salford CVS

Salford CVS manages the Asset Fund (which provides up to £5,000 to VCS organisations to fund activities which support the rehabilitation process) and the Personal Support Recovery Fund (which provides grants of up to £500 for specific items which may be beneficial in achieving recovery goals).

In 2020/21 projects supported by the Asset Fund helped 623 individuals, of which 272 were Achieve service users. Itsherstory (Salford and Trafford), a confidence and skills course for returning to work, delivered an online offer supporting 26 women, all of whom completed the course. Outcomes included: three women in volunteer roles, five women in full time paid work, six women returning or setting up a self-employed role and three women in further education or training.

In 2020/21 the Personal Recovery Support Fund directly supported 134 individual Achieve service users with awards supporting the achievement of their recovery goals. This was more than three-times the figure for 2019/20. Requests for support include refurbished laptops to enable remote access of recovery services, white goods, furniture, gym membership and training or tools to enable self-employment.

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Achieve Community Access Clinics

Within Bury, Achieve deliver our core adult substance misuse treatment service from Humphrey House, alongside our partner agencies who provide a range of housing, outreach, in reach and young people's services across Bury. We took our learning from adopting different engagement approaches during the pandemic and reflected that some of our service users find it difficult to attend in person at Humphrey House and that there are many advantages for some people to be seen in venues more local to their own communities.

Achieve responded in late 2022 and developed a pilot for community access clinics in Radcliffe (a high needs area of Bury) at a community venue within the area. Currently there are 108 service users who are regularly being offered appointments at the Radcliffe community access clinic, this equates to approximately 16% of the population being supported by Achieve Bury. The overall aim of the clinics is to reduce inequalities by increasing ease of access to Achieve appointments, supporting service users to engage in their treatment and recovery, as well as reducing stigma. In addition to offering recovery coordinator appointments in these venues, Achieve also offer psychosocial interventions and recovery based education programmes via Intuitive Thinking Skills (an Achieve Partner).

The response since these clinics were set up has been extremely positive from both Achieve staff and service users.

Achieve service users said:
"AC is a great worker, kind and understanding overall "Top man". I live in Radcliffe, the clinic means I have no contact with other users, no pressure"

"Good support and insightful information provided by AC. Radcliffe community clinic is closer to where I live, gets rid of the temptation to go and score in Bury"

"Being able to attend the clinic in Radcliffe means everything to me for a few reasons: main one being able to come and see AC without bumping into other users and the clinic being close for me so I can attend without a mission to Bury. I've been under AC with Achieve since early last year and being able to access the service easily has been a huge help for my Recovery. AC has listened, understood, not judged me once and has been the help I've need to achieve where I am in my recovery up to now. He is a diamond."

Other professionals said:
Since the outreach centre opened, I have received many compliments from the residents suffering from drug and alcohol abuse. As you are aware we are a community supported accommodation who support residents with learning disabilities and mental health. Having a mental health diagnosis can cause much anxiety and when also suffering from drug and alcohol abuse this can be difficult to be able to achieve goals through attending appointments, since the Achieve community clinic opened, we have seen more residents enthusiastic and confident to attend appointments and receive support."

"I can honestly say it has been a pleasure to host you. IS has a professional manner and has integrated with the team well. He has given my team support and I am sure we have also supported you when required. Overall, I am delighted to have this opportunity and I can see the difference it is making to the local community that you are supporting. Long may this continue."

“Having Achieve working out of the office has been extremely useful for not only service users but staff here. Not only does this benefit the service user engagement wise but having his worker here on site for any help is extremely beneficial. Being able to help each other as services together is such a positive and helpful thing for staff and service users."

Achieve staff have said:
“I feel the Achieve Clinic is what the community needed to have an open-door approach to helping individuals overcome drug and alcohol misuse. "

“It’s reassuring to receive feedback from service users and know that this approach will help to empower service users to reach their full potential”.

EQUALITY ANALYSIS

This Equality Analysis considers the effect of Bury Council/ Bury CCG activity on different groups protected from discrimination under the Equality Act 2010. This is to consider if there are any unintended consequences for some groups from key changes made by a public body and their contractor partners organisations and to consider if the activity will be fully effective for all protected groups. It involves using equality information and the results of engagement with protected groups and others, to manage risk and to understand the actual or potential effect of activity, including any adverse impacts on those affected by the change under consideration.

For support with completing this Equality Analysis please contact corporate.core@bury.gov.uk / *0161 253 6592*

SECTION 1 – RESPONSIBILITY AND ACCOUNTABILITY Refer to Equality Analysis guidance page 4	
1.1 Name of policy/ project/ decision	Substance misuse contract
1. 2 Lead for policy/ project/ decision	Jon Hobday – Director of Public Health
1.3 Committee/Board signing off policy/ project/ decision	Cabinet
1.4 Author of Equality Analysis	*Name: Sarah Turton* *Role: Public Health Practitioner* *Contact details: s.turton@bury.gov.uk*
1.5 Date EA completed	*14/09/23*
1.6 Quality Assurance	*Name: Lee Cawley* *Role: EDI Manager* *Contact details:* *Comments: QA Completed, positive impacts only identified and no further actions required.*
1.7 Date QA completed	*19/09/2023*
1.8 Departmental recording	*Reference:* *Date:*
1.9 Next review date	

SECTION 2 – AIMS AND OUTCOMES OF POLICY / PROJECT Refer to Equality Analysis guidance page 5	
2.1 Detail of policy/ decision being sought	Options presented for once our current substance misuse contract comes to an end in August 2024.
2.2 What are the intended outcomes of this?	Options presented are 1) Direct award to GMMH (current provider), 2) Tender for new provider. Recommendation: Option 1 – Direct award to GMMH.

SECTION 3 – ESTABLISHING RELEVANCE TO EQUALITY & HUMAN RIGHTS

Refer to Equality Analysis guidance pages 5-8 and 11 Please outline the relevance of the activity/ policy to the Public Sector Equality Duty		
General Public Sector Equality Duties	**Relevance (Yes/No)**	**Rationale behind relevance decision**
3.1 To eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by Equality Act 2010	Yes	Provider works to reduce stigma associated with drug and alcohol misuse through campaigns, training, peer groups etc.
3.2 To advance equality of opportunity between people who share a protected characteristic and those who do not.	Yes	Ensuring equality of people referred to and/or accessing the service.
3.3 To foster good relations between people who share a protected characteristic and those who do not	Yes	Community development team established within the provider who work with the VCSE sector. Lived experience volunteer and paid roles within the service.
3.4 Please outline the considerations taken, including any mitigations, to ensure activity is not detrimental to the Human Rights of any individual affected by the decision being sought.		
Used appendix 1.1 (human rights flow chart) and the decisions passes the human rights screening.		

SECTION 4 – EQUALITIES DATA Refer to Equality Analysis guidance page 8			
Protected characteristic	**Outcome sought**	**Base data**	**Data gaps (to include in Section 8 log)**
4.1 Age	Service sees people of all ages	Adult service and Children / young people's service available NDTMS - ViewIt - Adult NDTMS - ViewIt - Young People	
4.2 Disability	Service sees people with disabilities	NDTMS - ViewIt - Adult	
4.3 Gender	Service sees people of any all genders	NDTMS - ViewIt - Adult	
4.4 Pregnancy or Maternity	Service see people during pregnancy and/or maternity	Service has an alcohol-exposed pregnancies programme embedded – provider data available.	
4.5 Race	Service sees people of all race	NDTMS - ViewIt - Adult	
4.6 Religion and belief	Service sees people of all religions and beliefs	NDTMS - ViewIt - Adult	
4.7 Sexual Orientation	Service see people of any sexual orientation	NDTMS - ViewIt - Adult	

4.8 Marriage or Civil Partnership	Service sees people whether married or in civil partnership	Update: provider records on their internal system Paris.	To check with provider if this data is recorded.
4.9 Gender Reassignment	Service sees people undergoing / who have undergone gender reassignment	Update: provider records on their internal system Paris.	To check with provider if this data is recorded.
4.10 Carers	Service sees carers and has links to Carers Hub	NDTMS - ViewIt - Adult	
4.11 Looked After Children and Care Leavers	Service sees looked after children and care leavers	NDTMS - ViewIt - Young People	
4.12 Armed Forces personnel including veterans	Service sees armed forces personnel	Data available from provider on request as recorded at assessment.	
4.13 Socio-economically vulnerable	Service sees those who are socio-economically vulnerable	Data available via NDTMS commissioning support packs.	

SECTION 5 – STAKEHOLDERS AND ENGAGEMENT Refer to Equality Analysis guidance page 8 and 9		
	Internal Stakeholders	External Stakeholders
5.1 Identify stakeholders	Bury Council Public Health	Greater Manchester Mental Health Trust, Early Break, BigLife, lived experience peers
5.2 Engagement undertaken	Market research	Lived experience work
5.3 Outcomes of engagement	Comparison of GM providers in terms of numbers in treatment and contract values.	Analysis of the service from a lived experience perspective via the 'Bury the Stigma' event
5.4 Outstanding actions following engagement (include in Section 8 log)	Options paper drafted for cabinet detailing options and recommendation.	Summary of actions for provider and discussions of formulating a lived experience peer support forum.

SECTION 6 – CONCLUSION OF IMPACT Refer to Equality Analysis guidance page 9 Please outline whether the activity/ policy has a positive or negative effect on any groups of people with protected inclusion characteristics		
Protected Characteristic	**Positive/ Neutral Negative/**	**Impact (include reference to data/ engagement)**
6.1 Age	Positive	NDTMS - ViewIt - Adult Services available for all age groups.
6.2 Disability	Positive	NDTMS - ViewIt - Adult This service is available to people with disabilities, as well as links established to signpost to other services required or community groups / forums.

6.3 Gender	Positive	NDTMS - ViewIt - Adult The service is available to all genders.
6.4 Pregnancy or Maternity	Positive	Alcohol-exposed pregnancy pathway in place in Achieve and Early Break.
6.5 Race		NDTMS - ViewIt - Adult Assertive outreach takes places within areas / groups associated with specific race to break down any barriers to support or treatment.
6.6 Religion and belief	Positive	NDTMS - ViewIt - Adult Assertive outreach takes places within areas / groups associated with specific religions or belief to break down any barriers to support or treatment.
6.7 Sexual Orientation	Positive	NDTMS - ViewIt - Adult Links with community LGBTQI+ groups / forums. Early Break working with The Proud Trust around offers for LGBTQI+ groups.
6.8 Marriage or Civil Partnership		The service is available to those who are married or in a civil partnership.
6.9 Gender Reassignment		The service is available to those who are undergoing or who have undergone gender reassignment. To check with Achieve is this information is recorded.
6.10 Carers	Positive	NDTMS - ViewIt - Adult Links with Bury Carers Hub.
6.11 Looked After Children and Care Leavers	Positive	NDTMS - ViewIt - Adult Early Break able to support looked after children and care leavers with an MDT approach.
6.12 Armed Forces personnel including veterans	Positive	Data available from provider on request as recorded at assessment. Provider have good links with community veteran support groups that service users can be linked in with when required.
6.13 Socio-economically vulnerable	Positive	Data available via NDTMS commissioning support packs.
6.14 Overall impact - What will the likely overall effect of your activity be on equality, including consideration on intersectionality?	The service does not discriminate against any protected characteristics and is inclusive of all within the community. The service also provides signposting or referrals to other services if required which will benefit the service users. This service has a community development team who link in with the VCSE sector which means service users can also be signposted into community groups which may be beneficial in terms of lived experienced and peer support.	

SECTION 7 – ACTION LOG Refer to Equality Analysis guidance page 10			
Action Identified	Lead	Due Date	Comments and Sign off (when complete)
7.1 Actions to address gaps identified in section 4			
Check with provider if gender reassignment information is recorded.	Sarah Turton	5th October 2023	Checked with provider – Achieve do record 'gender reassignment' on their internal system 'Paris' – action closed.
Check with provider if marriage or civil partnership information is recorded.	Sarah Turton	5th October 2023	Checked with provider – Achieve do record 'marriage or civil partnership' on their internal system Paris – action closed.
7.2 Actions to address gaps identified in section 5			
N/A			

7.3 Mitigations to address negative impacts identified in section 6			
N/A			
7.4 Opportunities to further inclusion (equality, diversity and human rights) including to advance opportunities and engagements across protected characteristics			

SECTION 8 - REVIEW Refer to Equality Analysis guidance page 10			
Review Milestone	Lead	Due Date	Comments (and sign off when complete)
New contract	Sarah Turton	August 2024	

Please make sure that every section of the Equality Analysis has been fully completed. The author of the EA should then seek Quality Assurance sign off and departmental recording.

SECTION 9 – QUALITY ASSURANCE Refer to Equality Analysis guidance page x		
Consideration	**Yes/ No**	**Rationale and details of further actions required**
Have all section been completed fully?	yes	
Has the duty to eliminate unlawful discrimination, harassment, victimization and other conducted prohibited by the PSED and Equalities Act been considered and acted upon?	yes	
Has the duty to advance equality of opportunity between people who share a protected characteristic and those who do not been considered and acted upon	yes	
Has the duty to foster good relations between people who share a protected characteristic and those who do not, been consider and acted upon	yes	
Has the action log fully detailed any required activity to address gaps in data, insight and/or engagement in relation to inclusion impact?	yes	

Have clear and robust reviewing arrangements been set out?	yes	
Are there any further comments to be made in relation to this EA	n/a	

Agenda Item 11

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 07 November 2023
Subject:	Housing support service: young people 18-25 years - Care Provider Contract Award	
Report of	Deputy Leader and Cabinet Member for Health and Wellbeing	

Summary

1. The Community Commissioning Adult Social Care (ASC) Specialist Housing programme, was approved by Cabinet on 1st June 2022, responding to the demand to provide more housing for our residents with additional needs.

2. Mortimer, Mortimer and Mortimer (property developer) approached the Authority with an offer to use 18-20 St Marys Place BL9 0DZ for ASC customers. The property offers high quality accommodation (flats) in the town centre, with a staff unit and space for communal activities. Inclusion Housing were the only provider to submit an expression of interest for this property and have therefore been confirmed as the registered provider for this development.

3. This proposal outlines an innovative support service, which will provide a transitional home for 8 young Bury adults with Learning Disabilities and /or autism, aged 18-25 years. Young adults will be supported in their home for 2 years, with a further 2 years outreach support available to them after they leave.

4. This support service is the first of its kind in Bury, offering an aspirational "own front door" accommodation to young adults, with support which encourages them to be independent and progress to other housing opportunities. The outreach support offered to them is based on best practice; and designed to offer continuity of support at a time of change and prevent escalation of challenging behaviour (and more expensive placements) as a result.

5. A procurement process will be completed via a Teckel exemption or Invitation to Tender to the open market.

Recommendation(s)

It is recommended that Cabinet:

6. Approve the Procurement of a Care Provider for 18-20 St Marys Place Bury either :
   i) via a Teckal exemption; or
   ii) An Invitation to Tender to the open market (if needed)

7. Delegate the approval for the 4 year contract award (with an option to extend for another 2 years) to the Executive Director of Health and Adult Care, to be awarded. Procurement route to be confirmed in due course.

8. Delegate approval for the 2-year extension of the contract, if required, of the chosen Care Provider to the Executive Director of Health and Adult Care.

9. Note that the proposed contract will be funded using Bury's Adult Social Care Community Care budget.

Reasons for recommendation(s)

10. This innovative support scheme offers a transitional living service for young adults with Learning Disability aged 18-25 years. The potential for cost savings/cost avoidance has been demonstrated. The scheme offers 8 units towards our corporate and ASC housing commitments and supports our 'Let's Do It' strategy in offering an opportunity for people to live locally, independently, and with choice.

Alternative options considered and rejected

11. Option 1: Not to proceed with the scheme

The impact of this will mean young adults continue to be placed out of borough and/or in more expensive placements. This accommodation and model of care (including follow-up support to prevent escalation of crisis/ challenging behaviour), follows best practice. Not to proceed with the scheme would be a missed opportunity to:

i) pilot a new transitional offer for young adults
ii) contribute towards our ASC housing targets, which provide people with learning disabilities the chance to live locally, independently, with choice
iii) save and prevent costs compared to people living independently/placing young people in expensive out of borough placements.

Option 1 was therefore rejected.

12. Option 2: To proceed with the scheme using an alternative property/landlord

This scheme was brought to our attention by the property developer Mortimer, Mortimer and Mortimer Ltd. ASC operational professionals and commissioning staff viewed the property for suitability. All agreed the property as suitable for this type of service. The property developer and vendor have been very supportive in the current fast-paced housing market.

Option 2 was therefore rejected.

Report Author and Contact Details:

Name: Hannah Wilson
Position: Integrated Commissioning Officer – Learning Disabilities & Autism

Department: Adult Social Services and Community Commissioning
E-mail: H.Wilson@bury.gov.uk

Background

13. The Community Commissioning Adult Social Care (ASC) Housing Programme was approved by Cabinet on 1st June 2022 and outlined the vision and plans to develop housing for people with additional needs.

14. The ASC commissioning team are therefore developing various housing schemes, including the 18-20 St Marys Place offer.

15. Mortimer, Mortimer and Mortimer Ltd (property developer) approached the Authority with an offer to use 18-20 St Marys Place BL9 0DZ for ASC customers.

16. The vision for the scheme, developed with a wide range of stakeholders, is:
    - The provision of a home with support, to further develop independent living skills, for up to 2 years.
    - Focused on young adults agreed 18-25 years, with low/medium need Learning Disabilities and/or autism.
    - After a maximum of 2 years in St Marys Place, there is further outreach support available for the young adults for 2 years as they adjust to living independently within the community, if required.

17. The general description of 18-20 St Marys Place is:
    - 9 self- contained flats in the property.
    - Refurbished to a high specification that reflects the Council's quality standards expected for our customers.
    - Situated in the town centre, close to all amenities, educations, employment and public transport networks to encourage and enable independent living.
    - Eight "own front door" flats will be for Bury customers; and one flat available for staff office and communal space.

18. Visits to the property were made by ASC Operations social work professionals (LD) and Integrated Commissioning Officers. Feedback was that people were impressed by the quality of the flats and keen for the scheme to progress.

19. The Adult Social Care commissioning and operational teams recognised there is a demand for this type of property. A number of young adults in receipt of social care have been identified for referral as potential customers. Traditionally, this cohort would likely have been placed out of borough and or in high-cost

placements as current housing stock and care solutions does not meet their requirements and aspirations.

20. There is currently no provision of this type in Bury; and offering this type of transitional home prevents high cost out of borough placements; escalation of behaviour and crisis management. This scheme would support both improved outcomes for people aged 18-25 years and cost savings.

Procurement Route

A Care Provider for St Mary's Place is required and will be commissioned via Option A or Option B below.

21. Option A
    The Council will utilise the *Teckal* case exemption now codified under Regulation 12 of the Public Contracts Regulations 2015. This permits a local authority to make a direct award of a contract to a legal person under its control.

22. Option B
    Or, a competitive procurement process will be instituted in accordance with the Procurement Rules with an Invitation to Tender to the open market. The opportunity will be advertised within an identified budget.

    Information on timescales will be confirmed when the procurement process is confirmed.

Funding

23. Costs for the care provision within St Mary's Place will be met from the existing Adults Social Care Community Care Budget.

Sustainability of St Mary's Place

Affordable rent setting

24. One of the crucial matters for Inclusion before the scheme was progressed, was to ascertain the rent levels and ensuring that this was agreed by the Council's Revenue and Benefit department. This has been agreed.

Void arrangements

25. The Voids policy from the Registered Provider has been shared with the Council and will be shared with the Care Provider once they are confirmed. Inclusion will cover rent costs for 3 months when a flat becomes vacant. After 3 months the

Council and the Care Provider will both be responsible for 50% of the void costs. This will be made clear to the Care Provider before a contract is awarded.

26. Mortimer, Mortimer and Mortimer Ltd own the building and then Inclusion, as their partner, would rent directly to our customers. The care provision would be block-purchased separately.

27. The terms of the lease and service level agreement (SLA) between the Care Provider and Landlord are yet to be finalised as the Care Provider is not confirmed. Persona have expressed interest in principle but have requested further information before making a decision.

28. There is assurance from the LIN data that there is a current and future demand for this type of provision, therefore should offset any concerns about void risk and associated costs.

29. It has been agreed that we have 100% nomination rights for the Council, given the strength of expected demand.

Costs of Care

30. The purpose of this provision is for customers with low/medium need. One unit for staff use, 8 units/flats for customers.

31. The costs of care are driven by the type of client (e.g., high/low need, high/low risk). There is clear demand for this type of provision.

32. One Care Provider will offer support to all eight customers, this allows more efficient care costs, ensuring value for money by allowing the Provider to offer shared support, modelling staffing requirements on client needs.

33. Our commissioning intentions are to award a block contract over a four-year period, with 2-year extension available should it be required.

Calculation of indicative cost savings

We have calculated current costs of 8 people with low to medium need against potential cost savings for the St Mary's Place project. Details are given in Part B of the paper, recognising they are commercially sensitive because the procurement process for the care provider is yet to be undertaken.

Links with the Corporate Priorities:

34. The scheme provides local accommodation for those with additional needs in Bury: both now and in the future.

35. It increases housing choices for our young adults with additional needs, enabling an increased number of people to live independently with support, encouraging them to move on into homes of their own in the future.
36. This scheme has several innovative aspects; also noting the local investment into property by the housing developer and creation of jobs expected locally by the Care Provider.
37. We are working together to design quality, fit-for-purpose homes for people with additional needs in Bury, which ensures inclusivity throughout the housing agenda
38. Taking a strengths-based approach to recognise the assets and strengths of our residents – the aim of the scheme is to develop independent living skills, to empower young Bury adults to move on to homes of their own, retaining control and independence.

Equality Impact and Considerations:

39. People with additional needs – for example – people with learning or physical disabilities are disadvantaged in terms of accessing services and having opportunities: this scheme specifically addresses the inequities of access to the housing market and support services, responding to the needs and demand recognised in the Specialist Housing Programme, approved by Cabinet on 1st June 2022.

Environmental Impact and Considerations:

40. The housing scheme is based above commercial premises in the town centre, with good links to public transport for staff and customers, therefore the carbon footprint is expected to be reduced as we bring people back from out of borough or from existing premises where clients and staff currently have to travel by other means.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation

Legal Implications:

Both of the procurement routes proposed in this matter are lawful and are in accordance with the Public Contract Regulations 2015 and the Council's Contract Procedure Rules.

Financial Implications:

The cost will be funded from the existing Adult Social Care Community Care Budget. As part of the monthly budget monitoring cycle, Finance, Commissioners and Social work teams will triangulate and track the expenditure linked to the provision set out in this report ensuring that all expenditure aligns to the funding provided. Any financial risks/pressures identified will be highlighted to the Director of Adult Social Services as part of the monthly budget monitoring cycle whereby an action plan will be deployed to mitigate any financial risks/ pressures.

The contract duration is 4 years, with an option to extend for a further two years. Annual contract reviews are built into the contract monitoring process and will ensure voids at the units and non-take up of care services are kept to a minimum otherwise the Council is at risk of paying for unused hours of care.

A close working relationship is essential with the Care Provider to ensure that there is an identified cohort of residents ready to move into the properties should an apartment become vacant during the contract period.

Background papers:

None.

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

Term	Meaning

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Agenda Item 12

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 07 November 2023
Subject:	Topping Mill Mental Health Supported Living Scheme	
Report of	Deputy Leader and Cabinet Member for Health and Wellbeing	

Summary

1. This report requests approval to commission care and support services for a new mental health supported housing scheme which aligns to Bury Council's Housing for Adults with Additional Needs Strategy 2021-2025 and will help achieve the commissioning priorities in Bury's Mental Health Market Position Statement 2022-2025:

- **Topping Mill, Topping Street, Bury BL9 6DR-** is a red-brick, two-storey, former industrial mill constructed in the mid to late 1800s. The building was originally occupied by the confectioners Scott & Rosse before they vacated in the 1960s. The property has been vacant for several years.

- In 2018, the site was acquired by St. David Group, a property development and investment company. The building has subsequently been stripped back to basic brickwork. Planning consent was granted in August 2021 for the conversion of the existing property to 15 residential apartments, comprising 13 x 1 beds and 2 x 2 beds.

- Plans have been further updated through conversations with the Council to refine the specification to 15 x 1 bed flats, with 1 unit for staff and 14 units for tenants. 4 units on the ground floor will be fully accessible / DDA compliant for wheelchair users.

- In summary, the key commercial proposal for the scheme is that the Council will purchase a block of care packages, at a discounted rate, to provide care to the user/tenant at each accommodation unit irrespective of take up of the services. Consequently, the risk of the Council not being able to place (aka "nominate") a user/tenant to use the care service must be managed effectively.

- As part of the associated property arrangements in each scheme the Council will have exclusive nomination rights to nominate a user/tenant to occupy the units and receive the associated care. The property arrangements include a lease between the owner and a Registered Housing Provider (RP). Rental arrangements depend on the RP

providing “Intensive Housing Management" (IHM) to secure a higher uncapped level of rent known as “Exempt Accommodation”. IHM is necessary in supported accommodation schemes due to the support user/tenants require to maintain their tenancies. The IHM support will be provided by the RP in conjunction with the care services provided, which this report seeks approval to procure.

Recommendation(s)

2. It is recommended that Cabinet:

- Approves the procurement through a competitive process of a care provider for the provision of mental health support at Topping Mill, Topping Street, Bury BL9 6DR.
- Approves the award of a 3-year contract to the successful bidder with the right to extend it for a further period of up to two years at the discretion of the Council, subject to monitoring of performance and satisfactory delivery of the desired outcomes.
- Notes that this will be funded using Bury’s Adult Social Care Community Care budget.

Reasons for recommendation(s)

3. The above recommendations align to the Council’s Housing for Adults with Additional Needs Strategy 2021-2025 and the vision for mental health supported accommodation to:

- Improve outcomes for people with mental health needs.
- Enable people to live independently.
- Reduce the need for out of area residential placements.
- Enable tenancy sustainment.
- Support management of long-term health conditions.
- Create employment for local people.
- Create value for individuals, communities, and statutory services.
- Reduce hospital admissions and / or reducing delayed transfers of care (DTOC) where people are fit for discharge but accommodation with appropriate support is the barrier.

Alternative options considered and rejected

4. None

Report Author and Contact Details:

Name: Ahmed Ajmi
Position: Integrated Strategic Lead
Department: Health and Adult Social Care- Community Commissioning
E-mail: A.Ajmi@bury.gov.uk

Background

1. Introduction

1.1 The Bury Housing for Adults with Additional Needs Strategy outlines the need to increase the number of beds / units in Bury by 2025 for people with Adult Social Care needs, including those with a mental health diagnosis.

1.2 Bury's Mental Health Market Position Statement projects an additional 86 supported living units are required to provide mental health provision by 2025.

1.3 A Mental Health Housing Group has been established to progress this work, with colleagues from health and social care teams and the housing growth and infrastructure team, providing valuable knowledge and insight.

1.4 Topping Mill, Topping Street, Bury BL9 6DR was presented to Bury Councils Commissioning Division to consider for adult social care use.

Based on local needs and demand for people with mental health conditions, the group propose that the following supported living specification is established at Topping Mill:

- Supported living accommodation for 14 people (18+) with a mental health diagnosis (mixed gender).
- The property will have 14 self-contained flats and one staff flat with office space, 4 units on the ground floor will be fully accessible / DDA compliant.
- Further, the building location offers town centre living, with close proximity to public transport and social activity, sitting only 0.25 miles from Bury Town Centre. Often this is not an option for residents receiving adult social care, as there are no suitable properties/buildings in the area.
- The development will be completed to the required specification of both Bury Council and the RP and will meet the needs of tenants.
- The development will adopt good environmental practice throughout.
- The developer has agreed a 20-year FRI lease of the finished building with Inclusion Homes as the Registered Housing Provider.
- Below is Topping Mill as it looks currently and how it will externally look after development.





1.5 Existing mental health supported living accommodation is varied, with a range of shared living (kitchen and lounge) facilities and 'own front door' self-contained accommodation. Bury currently has approximately 110 people living in mental health supported living accommodation across 29 different care providers. Around 30 of those people are jointly funded between adult social care and the NHS.

1.6 Consultation with Community Mental Health Team (CMHT) colleagues have confirmed there is a need to increase the supply of supported living, including for people who require 24/7 support.

1.7 Support from suitably qualified staff will help people on their recovery journey, supporting people with their needs including managing medication, attending appointments, and developing strategies to stay well. Furthermore, support to develop independent living skills such as cooking, budgeting and social inclusion will be a key focus of this contract.

1.8 People would be referred into the scheme by their Care Co-ordinator and assessed by the care provider to ensure all the people living in the scheme synergise well together. The allocation of apartments would be facilitated in partnership by Bury Council and CMHT through a special needs allocation process.

1.9 A Registered Housing Provider, Inclusion Housing, has agreed to be a partner in this project. The rent setting has been submitted for approval to Bury Council's Housing Benefit Team and agreed in principle. An Assured Shorthold Tenancy (AST) will be offered to tenants on a fixed term of up to 2 years. During this period tenants will be supported to further develop their independent living skills to improve resilience and community connections before being supported to move on to independent living in the community.

1.10 The approximate timescales for this project are:

Topping Mill, Bury	Approximate timescale
Cabinet approval to procure care provision	November 2023
Building work completed	April 2025
Provider recruits and trains staff	July 2025
People move into the property	September 2025

1.11 A tender process for the Topping Mill supported accommodation scheme will be conducted to appoint a suitable care provider. It is envisaged that the same provider will provide the required support to all tenants, for maximum efficiency. This scheme would offer a 24/7 model of care and support to tenants, meaning staff would be available during the day, early evening and overnight, seven days a week, 365 days a year.

2 Strategic Background

2.1 Bury Council's mental health spend is the highest per head of adult population when compared to 15 other statistical neighbours. Evidence suggests that people remain in accommodation, with higher levels of care and support than they need, due to the lack of options to 'step down' their support.

2.2 People are also placed out of Borough, due to the lack of provision in Bury to meet their needs. This scheme will enable us to prevent some people from being placed out of Borough ensuring they remain close to family and social networks. Furthermore, this approach is a more cost-effective way to commission care and support.

2.3 Topping Mill will also improve the wider system flow creating accommodation and support options for people on delayed transfer of care (DTOC) in hospital, the scheme will offer 24/7 supported living and will therefore fill a deficit in local provision.

2.4 It is expected the scheme will be staffed 24 hours a day, to provide the required level of support for a mental health scheme. The estimated contract values have been calculated and are detailed later in this report**.**

2.5 The building will be owned by private developers. However, the housing management functions will be carried out by the Registered Housing Provider Inclusion Homes and they will claim Intensive Housing Management fees through Housing Benefit.

2.6 The Council has negotiated 100% nomination rights in perpetuity for all 14 units of accommodation. The Council will also be paying a block contract for the care provision in all 14 units. Whilst the nominations agreement is in perpetuity it can be ended with notice as per the terms of the contract.

2.7 Commissioners are therefore seeking to award a block contract for the care support for all 14 apartments by negotiating reduced prices from the Bury Council standard supported living rates, this will provide further savings opportunities, estimated in the region of 6%-10% from the standard rates.

2.8 The contract will outline the required outcomes, performance and monitoring arrangements and will incorporate review milestones.

Links with the Corporate Priorities:

4 The Housing for Adults with Additional Needs Strategy aligns to the Bury Let's Do It Strategy which provides the vision to enable people of all ages to live well within their neighbourhoods, supported by the integration of public services with our neighbourhood hubs.

Local

- Local housing options for local people

- Developing and regenerating the unique townships where people live
- Prevent the need for Bury residents to have to move out of the borough to have their needs met.
- Bring Bury residents back in borough if its right for them.
- Work with local developer's and providers who know the local area.

Enterprise

- Encouraging enterprise to drive inclusive economic growth through our business community.
- Enterprising innovation and creative solutions to current housing issues.
- Be bold in our housing solutions and future developments in Bury.

Together

- Working together to design quality, fit for purpose homes for people with additional needs in Bury.
- Working together with service users, their cares and families to shape accommodation options and design.
- Working together to ensure inclusivity throughout the housing agenda.

Strengths

- Taking a strengths- based approach to recognise the assets and strengths of communities.
- Recognising the strengths of individuals enabling their independence, choice, and control for housing.

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5 Equality Impact and Considerations:

Please refer to Appendix 1 for Equality Analysis.

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6 Environmental Impact and Considerations:

As a minimum, the new homes will be built to the 'Future Homes Standard', including the installation of energy efficiency measures to reduce fuel bills and cut carbon emissions.

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7 Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Providing the right care to meet the needs of the people living in the schemes	Engagement with Mental Health Practitioners is on-going to understand the care needs of the people who could live in these properties to ensure appropriate care and support is in place when people move in.

Voids at the scheme placing financial risk on the authority.	The risk is low as the demand is high in the borough for mental health provision. However, to mitigate the risk further, the Council is developing a Specialised Housing Allocation Policy and will monitor movement of tenants and utilisation. Also agreed to share 50% of the voids risk with the nominated care provider.

8 **Legal Implications:**

The proposed competitive procurement process for the appointment of a care provider is lawful and is in accordance with the Council's Contract Procurement Rules.

9 Financial Implications:

The cost will be funded from the existing Adult Social Care Community Care Budget As part of the monthly budget monitoring cycle, Finance, Commissioners and Social work teams will triangulate and track the expenditure linked to the provision set out in this report ensuring that all expenditure aligns to the funding provided. Any financial risks/pressures identified will be highlighted to the Director of Adult Social Services as part of the monthly budget monitoring cycle whereby an action plan will be deployed to mitigate any financial risks/ pressures.

The contract duration is 3 years, with an option to extend for a further two years.

Annual contract reviews are built into the contract monitoring process and will ensure voids at the units and non-take up of care services are kept to a minimum otherwise the Council is at risk of paying for unused hours of care.

A close working relationship is essential with the care provider to ensure that there is an identified cohort of residents ready to move into the properties should an apartment become vacant during the contract period.

Appendices:

None

Background papers:

Bury Housing with Additional Needs Strategy

Housing with Additional Needs Market Position Statement

Term	Meaning
DDA	Disability Discrimination Act
IHM	Intensive Housing Management
RP	Registered Housing Provider

EQUALITY ANALYSIS

This Equality Analysis considers the effect of Bury Council/ Bury CCG activity on different groups protected from discrimination under the Equality Act 2010. This is to consider if there are any unintended consequences for some groups from key changes made by a public body and their contractor partners organisations and to consider if the activity will be fully effective for all protected groups. It involves using equality information and the results of engagement with protected groups and others, to manage risk and to understand the actual or potential effect of activity, including any adverse impacts on those affected by the change under consideration.

SECTION 1 – RESPONSIBILITY AND ACCOUNTABILITY *Refer to Equality Analysis guidance page 4*	
1.1 Name of policy/ project/ decision	Commissioning of Topping Mill- Mental Health Supported Living Scheme
1. 2 Lead for policy/ project/ decision	Adrian Crook, Director of Community Commissioning, Health & Social Care.
1.3 Committee/Board signing off policy/ project/ decision	Bury Council- Cabinet
1.4 Author of Equality Analysis	Name: Ahmed Ajmi Role: Integrated Commissioning Lead, Carers, Physical Disabilities & Prevention Contact details: A.Ajmi@bury.gov.uk
1.5 Date EA completed	24th October 2023

SECTION 2 – AIMS AND OUTCOMES OF POLICY / PROJECT *Refer to Equality Analysis guidance page 5*	
2.1 Detail of policy/ decision being sought	Our Bury Plan for 2030 "Let's Do It" outlines the approach to our residents and partners, to address challenges like health inequalities and deprivation in Bury and learn from the changes and challenges arising from COVID-19 pandemic. The aim is to make sure everyone has the best possible life chances by developing: • A new relationship between public services and our residents which is based on co- design and accountability for shared decision making. We will work with you, not do to you.

	• A place-based shaping of public services that redefines local services and puts individuals, families, and communities at the heart of decision making. • An asset-based approach that recognises and builds on the strengths of individuals, families and our communities, rather than focusing on the deficits. • Behaviour change in communities that builds independence and supports residents to be in control. • A stronger prioritisation of wellbeing, prevention and early intervention. • An approach that supports the development of new investment and resourcing models, enabling collaboration with a wide range of organisations. • An evidence-led understanding of risk and impact to ensure the right intervention at the right time. The introduction of the Care Act 2014 provided an opportunity to bring together several existing laws, and introduced new duties to ensure that wellbeing, dignity and choice are at the heart of health and social care. The Act places a statutory duty on local authorities to promote the diversity and quality of local services, in order that there is a sufficient range of high-quality service providers to enable genuine choice for service users. The 2021 Adult Social Care White Paper *'People at the Heart of Care: adult social care reform'* recognised the importance of housing in a person's health and wellbeing. Ensuring homes are suitable to meet a person's current and future needs, connecting people to a community where they choose to live, maintaining independence and providing choice of housing options whilst empowering individuals to live a fulfilling life is important. Bury Council- *Bury Adult Social Care Housing for those with Additional Needs Strategy* clearly states the needs for additional homes for people who have mental health needs. For people living with mental health conditions our ambition is to develop 6 new schemes between 2022 and 2025 delivering an additional circa 86 beds or units in Bury. This proposal for Topping Mill supported living for people with mental health needs offers an excellent opportunity to meet the target detailed in the strategy, scale up good quality homes for people and provide an environment that promotes independent living and a better quality of life.
2.2 What are the intended outcomes of this?	Topping Mill aligns to the Councils Housing for Adults with Additional Needs Strategy 2021-2025 and the vision for mental health supported accommodation to:

	• Improve outcomes for people with mental health needs. • Enable people to live independently. • Reduce the need for out of area residential placements. • Enable tenancy sustainment. • Support management of long-term health conditions. • Create employment for local people. • Create value for individuals, communities, and statutory services. • Reduce hospital admissions and / or reducing delayed transfers of care (DTOC) where people are fit for discharge but accommodation with appropriate support is the barrier.

SECTION 3 – ESTABLISHING RELEVANCE TO EQUALITY & HUMAN RIGHTS

Refer to Equality Analysis guidance pages 5-8 and 11

Please outline the relevance of the activity/ policy to the Public Sector Equality Duty

General Public Sector Equality Duties	Relevance (Yes/No)	Rationale behind relevance decision
3.1 To eliminate unlawful discrimination, harassment and victimisation and other conduct prohibited by Equality Act 2010	Yes	For people living with serious mental illness, housing can be a critical factor in helping people to live as independently as possible, while also accessing the support they need to live in local communities. Settled housing is known to have a positive impact on mental health. Mental ill health is frequently cited as a reason for tenancy breakdown, with housing problems frequently referenced as a reason for someone being admitted or re-admitted to inpatient care. There are significant delays in discharging patients who are medically well, with one of the key reasons being a lack of appropriate housing or accommodation post discharge. The total number of days of delays to discharge from mental health services linked to housing was 4,286 in April 2021 and has continued to increase over the year. In January 2022, the number stood at an increase of 59 per cent. **(NHS Digital, Mental Health Services Data Set**

		(MHSDS), [online], accessed 25 April 2022, https://digital.nhs.uk/dataand-information/data-collections-and-data-sets/data-sets/ mental-health-services-data-set Safe and secure housing is critical in enabling people to work and take part in community life. Many people with a mental health issue can live independently in their own home. As Bury Council, we need to provide a range of options and support to maintain this. Lack of housing can impede access to treatment, recovery and militate against social inclusion. Delayed discharge because of difficulties with housing is both common and persistent. Housing has become recognised as a central part of an effective recovery pathway, as well as a key element in preventing ill health and reducing the need for inpatient care. It provides the basis for individuals to recover, receive support and help in the least restrictive environment possible. In many cases, settled accommodation facilitates a return to work or education. A home is a critical foundation in all our lives, physically and psychologically, and is our primary location of care and support. Many people with mental health problems are also placed in residential or nursing homes where there are vacancies instead of supported housing options, which may not be available to support people with complex needs. These facilities are not generally designed to maintain independence and so people, including younger people, become de-skilled and unable to maintain levels of self-care and choice when they could remain independent for longer, with the right level of support and environment. In addition to this many care home providers are offering placements to adults with mental health problems rather than older people who may also have physical health needs which in

		some areas has resulted in too few placements for older adults who then become delayed discharges when admitted to acute or mental health inpatient services
3.2 To advance equality of opportunity between people who share a protected characteristic and those who do not.	Yes	Most accommodation for people with mental health needs is provided under section 18 of the Care Act 2014. Where a person 'ceases to be detained' under the Mental Health Act 1983, they are eligible for aftercare services, including housing. The Act and the accompanying regulations and guidance outline how housing can support a more integrated approach and set out local implementation. Of note: • A general duty to promote wellbeing makes reference to suitable accommodation. • Housing not just the 'bricks and mortar', also includes housing related support or services. • Housing must be considered as part of an assessment process that may prevent, reduce or delay an adult social care need • Information and advice should reflect housing options, as part of a universal service offer • Care and support delivered in an integrated way with cooperation with partner bodies, including housing.
3.3 To foster good relations between people who share a protected characteristic and those who do not	Yes	This service will help to deliver the Bury Adult Care Housing Vision by ensuring that adults with mental health needs develop independent living skills and are able to live actively in their localities.
3.4 Please outline the considerations taken, including any mitigations, to ensure activity is not detrimental to the Human Rights of any individual affected by the decision being sought.		
The list of Human Rights has been explored and this proposal does not have a detrimental impact on any area specified.		
SECTION 4 – EQUALITIES DATA *Refer to Equality Analysis guidance page 8*		

Protected characteristic	Outcome sought	Base data	Data gaps (to include in Section 8 log)
4.1 Age	Yes	• People in Bury are living longer; life expectancy for both men (79.1 years) and women (82.1 years) has been improving over time, but the rate of this increase has slowed and there is still a significant gap between the life expectancy in Bury and the England average. • There is also a social gradient to life expectancy in Bury, where men and women in the most deprived areas have a life expectancy of between 12.4 years (males) and 7.9 years (females) shorter than the least deprived areas. • It is also important to determine whether additional years of life are being spent in good health or prolonged poor health and dependency. Healthy life expectancy adds a quality-of-life dimension to life expectancy. Similar to Life Expectancy, there is inequality in healthy life expectancy between Bury and England. Male and female. There is also a social gradient to healthy life expectancy within Bury, where men and women in the most deprived areas have a life expectancy of between 14.8 years (males) and 13.4 years (females) shorter than the least deprived areas. Estimates suggest that 1 in 4 adults will experience mental health problems at any one time (25 percent). For Bury, this represents over 36,925 people aged over 18 years old.	
4.2 Disability	Yes	Data recorded by Public Health England reports the levels of depression and anxiety are higher in Bury 15.3%, when compared to the national average figure 13.7%. The 2020 household survey shows that 10% of Bury residents have a long-standing illness or health condition this equates to 19,069 people. It also suggests that 5.9% of the population have a physical or mobility impairment in Bury this is around 11,425 people. Also, around 6.5% of the population will have either a visual or hearing impairment. The predicted number of people who will have a mental health disorder (aged 18-64) in Bury by 2040. It demonstrates an increase of approximately 3.5%	

		from 2020 to 20404 across all conditions. Around 38,000 of the Bury population will have a mental health disorder (https://pansi.org.uk/ Mental health problem Bury data) Deprivation is a known risk factor that impacts on people's mental health, Public Health England data confirms Bury's score is 23.7, which is higher than the national average 21.7. The circumstances in which a disabled person who has mental health needs might require an adaptation are extremely varied. Often the adaptation will be intended to meet other difficulties that are not directly related to their mental health needs. The building specification has been designed with Community Mental Health Team (CMHT). The specification for the building will be 15 x 1 bed flats, with 1 unit for staff and 14 units for tenants. 4 units on the ground floor will be fully accessible / DDA compliant for wheelchair users. Depending on the tenant, there will be scope for minor adaptations at the scheme. Minor adaptations include items such as rails, small ramps, door intercoms or door widening. Supported living services such as Topping Mill will provide additional support and guidance to individuals with complex needs who require extra support with managing their mental health. It allows people to keep their independence and live in their own homes and have support on hand as and when needed.	
4.3 Gender	Yes	Topping Mill will provide a mixed gender for provision for people that have mental health needs.	
4.4 Pregnancy or Maternity	No – we do not believe this is currently being collated.	This service will not be for people who are pregnant or on maternity. Supported living in a mental health setting is not ideal for this group, rather alternative accommodation in the community i.e dispersed housing in the community would be best.	We do not believe this is currently being collated.
4.5 Race	Yes	Across the Northwest, the percentage of people from the "Asian, Asian British or Asian Welsh" ethnic group increased from 6.2% to 8.4%, while across England the percentage increased from 7.8% to 9.6%.	Limited information on smaller and emerging

		In 2021, 82.9% of people in Bury identified their ethnic group within the "White" category (compared with 89.2% in 2011), while 2.6% identified their ethnic group within the "Mixed or Multiple" category (compared with 1.8% the previous decade). People from BAME backgrounds have the same right as everyone else to access mental treatment and services. But research shows BAME people can face barriers to getting help, including: • not recognising they have a mental illness because mental health was stigmatised or never talked about in their community • not knowing that help is available or where to go to get it • language barriers • turning to family or friends rather than professional support, especially for people who don't trust formal healthcare services • financial barriers, such as paying for private counselling • not feeling listened to or understood by healthcare professionals • White professionals who do not understand their experiences of racism or discrimination The percentage of people who identified their ethnic group within the "Other" category ("Arab" or "Any other ethnic group") increased from 0.7% in 2011 to 1.9% in 2021. Despite higher prevalence, Black adults have the lowest mental health treatment rate of any ethnic group at 6% (compared to 13% in the White British group) Evidence suggests that people from Black Asian and Minority Ethnic communities are at higher risk of developing a mental health problem in adulthood. But they're less likely to receive support for their mental health People from Black communities are more likely than average to experience a common mental health problem in any given week. • Percentage experiencing a common mental health problem in the last week by ethnicity: • White British - 17% • White Other - 14% • Black and Black British - 23% • Asian and Asian British - 18% • Mixed & other - 20%"	communities in Bury

		Black men are more likely to experience symptoms of psychosis than other ethnic groups (3.2% compared to 0.3% of White men and 1.3% of Asian men - using combined 2007 and 2014 data.) There is no significant variation by ethnic group among women. 8% of Black or Black British adults have symptoms relating to post-traumatic stress disorder compared with 4% of their White British counterparts. People from Black and Minority Ethnic groups living in the UK are more likely to: • Be diagnosed with a psychotic disorder. However no difference was found in the Adult Psychiatric Morbidity Survey between Asian people and their White British counterparts in terms of experiencing psychotic disorders or common mental health problems. • Seek help in a crisis situation and in A&E. • Be admitted to hospital with a mental health problem. • Experience a poor outcome from treatment. • Disengage from mainstream mental health services. https://webarchive.nationalarchives.gov.uk/20180328140249/http:/digital.nhs.uk/catalogue/PUB21748	
4.6 Religion and belief	Yes	Census 2021 Bury responses: Christian (48.8%), Buddhist (0.3%) Hindu (0.5%) Sikh (0.3) Muslim (9.9%) Jewish (5.5%) %) Other (0.3%). 29.4% identified as having no religion	
4.7 Sexual Orientation	No – we don't believe this is currently being collated	Census 2021 was the first to collect information on the sexual orientation of residents aged 16 years and over in England and Wales. The census question was voluntary asked of those aged 16 years and over. • In total, 44.9 million people (92.5% of the population aged 16 years and over) answered the question. • Around 43.4 million people (89.4%) identified as straight or heterosexual. • Around 1.5 million people (3.2%) identified with an LGB+ orientation ("Gay or Lesbian", "Bisexual" or "Other sexual orientation"). • The remaining 3.6 million people (7.5%) did not answer the question.	

		This is almost certainly an underestimation of the actual national diversity of sexual orientation. Estimates provided by the LGBT Foundation and Stonewall state that between 5% and 7% of the population identify as Lesbian, Gay or Bisexual nationally. It is acknowledged that approximately 6-10% of any given population will be LGB. Source: MYE 2015 and Stonewall Access to the service is open to all who fulfil the service criteria	
4.8 Marriage or Civil Partnership	Yes	The Census 2021 published the details on adults' legal partnership status. • The proportion of adults who have never married or been in a civil partnership has increased every decade from 26.3% in 1991 to 37.9% in 2021, whereas the proportion of adults who are married or in a civil partnership (including separated) has fallen from 58.4% in 1991 to 46.9% in 2021. • The increase in adults who have never been married or in a civil partnership (since 2011), after standardising for age, is seen across all local authorities, religious groups and ethnic groups. • Between 2011 and 2021, the number of widowed adults (3.0 million) has decreased by 6.3%, women who are widowed decreased by 8.3%, but the number of men who are widowed increased by 0.6%. • The proportion of adults who are divorced is similar in 2021 (9.1%) and 2011 (9.0%); the proportion of younger adults who are divorced has decreased, whereas the proportion of older adults has increased. • Adults in same-sex marriages and civil partnerships are more likely to be younger, have no religion, and have higher-level qualifications than adults in opposite-sex marriages.	
4.9 Gender Reassignment	Yes	The question on gender identity was new for the Census 2021. The question was voluntary and only asked of people aged 16 years and over. A total of 45.4 million (93.5%) answered "Yes", indicating that their gender identity was the same as their sex registered at birth.	

		A total of 262,000 people (0.5%) answered "No", indicating that their gender identity was different from their sex registered at birth. Within this group: • 118,000 (0.24%) answered "No" but did not provide a write-in response • 48,000 (0.10%) identified as a trans man • 48,000 (0.10%) identified as a trans woman • 30,000 (0.06%) identified as non-binary • 18,000 (0.04%) wrote in a different gender identity The remaining 2.9 million (6.0%) did not answer the question on gender identity. In Bury: 94.37% of people aged 16 years and over in Bury have a gender identity the same as their sex registered at birth and is made up of approximately 51% females and 49% males. The GIRES (2009) report on Gender Variance in the UK estimated that around 20 in every 100, 000 people had sought medical care for gender variance. Using 15+ ONBS data of current list size of 163,013 (ONS 2015-16) the Gender Reassignment figure for Bury would be approximately 33 Bury Residents. Access to Topping Mill is open to all who meet the service criteria	
4.10 Carers	Yes	There are specialist services available for unpaid carers. However, services will provide condition specific information and advice. Statistics in Bury: 18,219 - Census 2021 1042 carers registered with the Bury Carers Hub (qtr4 returns 22/23)	
4.11 Looked After Children and Care Leavers	No – we do not believe this is currently being collated	The criteria will apply to anybody over 18 as long as they fulfil the rest of the service access criteria – anybody under the age of 18 will fall under the jurisdiction of Children's Directorate. However, the service will link in with Children Services with a willingness to support people who are transitioning from Children Services into Adult Services.	We do not believe this is currently being collated
4.12 Armed Forces personnel	No – we do not believe this is	On Census Day 1.85 million people in England and Wales reported that they had previously served in the	We do not believe this is

including veterans	currently being collated.	UK armed forces. This represents 3.8% (almost 1 in 25) of the total population aged 16 or over. **Bury:** The percentage of the population aged 16+ and over who had previously served in the UK armed forces 3.3%	currently being collated.
4.13 Socio-economically vulnerable	No– we do not believe this is currently being collated.	Bury has a higher-than-average proportion of claimants of Employment Support Allowance where the main condition stated was mental and behavioural disorders. • Bury is the 69 most deprived local authority in England • 10% of the local authority is within the 10% most deprived areas in the whole of England • 23% of children are living in low-income families, which is worse than average for England According to a report by Shelter, one in five of people has experienced mental health issues because of housing problems. Compared with the general population, people with mental health conditions are: one and a half times more likely to live in rented housing. twice as likely to be unhappy with their home. Research has shown that those who are homeless, or at risk of homelessness, are much more likely to experience mental distress. Further, Homeless Link reported in 2010 that 7 out of 10 of clients had mental health needs and a third of those lacked the support they need to address their mental health.	We do not believe this is currently being collated.

SECTION 5 – STAKEHOLDERS AND ENGAGEMENT *Refer to Equality Analysis guidance page 8 and 9*		
	Internal Stakeholders	External Stakeholders
5.1 Identify stakeholders	Social Care workforce INT workforce Corporate Core	Community Mental Health Team (CMHT) Fairfield Hospital Carers and family of people being supported.

		Potential future users of the service Members of the community
5.2 Engagement undertaken	Bury Council Community Commissioning Division	Community Mental Health Team St Davids Group (developer) Inclusion Housing
5.3 Outcomes of engagement	The engagement has provided significant contribution to what the building specification should look like for the benefit of the tenants with mental health needs. This is by ensuring that they are good quality homes for tenants, that they provide a space for strong interventions for independent living and improved quality of life.	The engagement has provided vital opinions from clinicians of the needs of tenants, from a person-centered perspective, good housing practice and statutory duty.
5.4 Outstanding actions following engagement (include in Section 8 log)	As the Community Commissioning Division in conjunction with CMHT identify tenants for the scheme, we will be engaging with them for their ideas what they want their flats to look like. This includes décor, furniture and other aspects which everyone deserves to make their space a home.	

SECTION 6 – CONCLUSION OF IMPACT

Refer to Equality Analysis guidance page 9

Please outline whether the activity/ policy has a positive or negative effect on any groups of people with protected inclusion characteristics

Protected Characteristic	Positive/ Neutral Negative /	Impact (include reference to data/ engagement)
6.1 Age	Positive	It is expected that the provider for care at Topping Milll provides a person-centered service to all the people it supports and will

		take steps to counteract the disadvantages people with a protected characteristic face and support people to achieve their full potential, regardless of age.
6.2 Disability	Positive	The overall purpose of the service is to enable people to achieve maximum potential, to stay at home, living as independently as they can and with the best possible quality of life.
6.3 Gender	Positive	The criteria for access to the service is the same for all protected characteristics who have a mental health need. It is unlikely there would be any disproportionate impact relating to gender.
6.4 Pregnancy or Maternity	Neutral	This service will not be for people that have a pregnancy or maternity. However, there are other housing options in the community that will be considered for their accommodation needs.
6.5 Race	Positive	It is unlikely there would be any disproportionate impact relating to Race. It is expected that the commissioned service will work with Bury Council and the community to consider how we can embed the need to reduce inequalities and identify barriers to accessing support.
6.6 Religion and belief	Positive	It is unlikely there would be any disproportionate impact relating to religion and belief. It is expected that the service provides a personalised service to all the people it supports, so would take account of any support needs relating to religion or belief.
6.7 Sexual Orientation	Positive	It is unlikely there would be any disproportionate impact in relation to sexual orientation. It is expected the commissioned service provide a service to all of the people it supports and has due regard to an individual's sexual orientation.
6.8 Marriage or Civil Partnership	Neutral	It is unlikely there would be any disproportionate impact in relation to marriage or civil partnership. The service is for single people, however we note that there be people that are married or are in a civil partnership. This would not affect their housing need for the scheme but needs to be considered when moving on into the community.
6.9 Gender Reassignment	Positive	It is unlikely there would be any disproportionate impact relating to gender reassignment. The service provides a personalises service to all the people it supports, so would take account of any support needs relating to gender reassignment.
6.10 Carers	Neutral	There maybe tenants that are also providing care to relatives or others in the community. This does not exclude them from the scheme.

6.11 Looked After Children and Care Leavers	Neutral	The criteria will apply to anybody over 18 as long as they fulfil the rest of the service access criteria – anybody under the age of 18 will fall under the jurisdiction of Children's Directorate. However, the service has a willingness to link with Children Services and will support young people who are transitioning from Children Services into Adult Services.
6.12 Armed Forces personnel including veterans	Positive	It is unlikely there would be any disproportionate impact in relation to Armed Forces personnel including veterans.
6.13 Socio-economically vulnerable	Positive	It is unlikely there would be any disproportionate impact in relation to Socio-economically vulnerable.
6.14 Overall impact - What will the likely overall effect of your activity be on equality, including consideration on intersectionality?	Positive - The overall purpose of the service provides good quality homes for people with mental health needs, promote independent living and improve the quality of life of tenants. The scheme is based in the Bury East area, which provides a good location for people who need access to their cultural needs i.e. Churches, Mosques, shopping for specific dietary requirements etc. There is a strong expectation that the commissioned provider shall develop good partnership arrangements with statutory services, the VCFA sector, along with local and national organisations. This is to promote independent living for people with mental health needs, reduce social isolation and improve their quality of life.	

SECTION 7 – ACTION LOG *Refer to Equality Analysis guidance page 10*			
Action Identified	Lead	Due Date	Comments and Sign off (when complete)
8.1 Actions to address gaps identified in section 4			
None that will have an impact on this programme of work. The intended outcome for this contract is to comply with statutory legislation whilst working to increase take up and the opportunity to tap into unmet need.			Ongoing engagement to continually monitor quality and identify opportunity of areas of development for the people of Bury. Analysis on demographics of customers will be part of the contract monitoring. Data and residents who are members of the forum group will be used to identify barriers and put forward suggestions on how barriers can be overcome.

8.2 Actions to address gaps identified in section 5			
The intended outcome for this contract is to comply with statutory legislation whilst working to increase take up and the opportunity to tap into unmet need.			Ongoing engagement to continually monitor quality and identify opportunity of areas of development for the people of Bury. Analysis on demographics of customers will be part of the contract monitoring.
8.3 Mitigations to address negative impacts identified in section 6			
The Community Commissioning Division of the Council hosts the Living Options Group. It is a space for professionals to look at housing needs of people by a case-by-case perspective. This will ensure that people are not excluded from services, without understanding their individual circumstances and dynamics within the scheme.			Ongoing engagement to continually monitor quality and identify opportunity of areas of development for the people of Bury. Analysis on demographics of customers will be part of the contract monitoring.
8.4 Opportunities to further inclusion (equality, diversity and human rights) including to advance opportunities and engagements across protected characteristics			
EA to be shared with the successful provider for comment and opportunity to contribute to the analysis	Ahmed Ajmi	July 2025	

SECTION 8 - REVIEW *Refer to Equality Analysis guidance page 10*			
Review Milestone	Lead	Due Date	Comments (and sign off when complete)
Ongoing	Ahmed Ajmi		By working with the Provider, Community Commissioning Division, CMHT, Registered Housing Provider and tenants to shape service delivery. It is anticipated the council can continue to meet its obligation in relation to the Care Act 2014, along with achieving the

			outcomes for the people the service supports.
Review EIA at 12 months	Ahmed Ajmi	October 2024	

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Agenda Item 13

Classification:	Decision Type:
Open	Key

Report to:	Cabinet	**Date:** 07 November 2023
Subject:	Strategic Housing Review – Future Management and Maintenance of Council Housing	
Report of	Cabinet Member for Housing Services	

Summary

To update Members on the in-principle decision to return the management of housing stock to the Council's direct control following a Strategy Housing Review and Tenants Test of Opinion.

Recommendation(s)

1. Note the work undertaken since the last update to Cabinet in October 2023.
2. Approve the return of Six Town Housing to direct Council control through a mutually agreed termination of the Management Agreement.
3. Agree that, subject to the support of the recognised Trade Unions through the Local Government Services Consultation Meeting:
   - Consultation with affected Council staff on changes to structures and responsibilities should begin on 13th November for a period of 30 days.
   - The Director of People & Inclusion should ask Six Town Housing to commence formal TUPE consultation with Six Town Housing staff following the same timeline
4. Note the transfer of housing management functions will take effect from 15th January 2024.
5. Instruct the Director of Law & Governance to enter into legal arrangements to support the termination and the return of stock to Council ownership.
6. Approve the restructure of Council Chief Officer responsibilities to support new responsibilities, subject to the outcome of consultation as described.

Reasons for recommendation(s)

To approve the return of housing management to the Council.

Alternative options considered and rejected.

The Council may continue with the existing management arrangements and continue to have the Housing Stock managed by Six Town Housing. This option has been rejected by the Council as tenants' views which were reported to the October Cabinet were in favour of a return to the Council directly managing the stock. Six Town Housing agree to the mutual termination of the management arrangements.

The Council could consider a hybrid arrangement where the management function could sit across a range of third-party providers, this option was discounted as the Council needs to ensure compliance with new social housing regulator standards by 1 April 2024. The contracting and procurement work required to appoint a third party would take time and resources best spent ensuring compliance with the housing regulator standards.

Report Author and Contact Details:
Name: Kate Waterhouse
Position: Executive Director Strategy and Transformation
Department: Corporate Core
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1.0 Background

A Strategic Housing Review was undertaken in 2023 and the outcomes reported to Cabinet on 7th June 2023. An in-principle decision was taken at this meeting to return Six Town Housing to direct Council control and, in the meantime, a programme of immediate improvement was directed.

A Tenant Test of Opinion on the in-principle decision was undertaken over the summer and the findings reported to Cabinet in October 2023. A 9.89% response rate was achieved, with 771 returns from our 7,700 tenants, of which 90.5% support the proposal for the Council to deliver the housing management and maintenance service directly.

Subsequently, a compliance audit led by the interim Chief Executive of Six Town Housing highlighted some immediate issues with property standards which are inconsistent with the current management agreement between Six Town Housing and the Council. This report updates Members on work to tackle identified issues and proposes a swift, mutually agreed, return of services to Council control.

1.1 Service Improvement progress to date

Improvement activity by Six Town Housing Services began over the summer. In October 2023 Cabinet was updated on the following improvements:

- A joint reception point for housing enquiries opened in August 2023 in the Town Hall, to offer face to face support. The new arrangements have been welcomed by tenants and received positive feedback.
- Tenant Satisfaction Measures which are compliant with The Regulator of Social Housing requirements were introduced in April 2023 and are now monitored monthly with improvement plans in place for areas not on target.
- Complaints processes have been reviewed and new processes implemented which are compliant with the expectations of the Regulator of Social Housing.
- Housing management services have been reviewed and a process is underway to align activity to the five neighbourhoods of the borough, the caretaking team

are now aligned with Housing Management to improve responsiveness in relation to environmental issues.
- A programme of Estate walkabouts with Ward Members has commenced.
- A review of Six Town Housing governance has been undertaken to streamline decision-making and focus activity on improvement and preparation for Regulation.
- A review of the Equality, Diversity and Inclusion Framework has been completed and was considered by the STH Board 20 September 2023.

All of the above have been completed apart from alignment of neighbourhood staffing with this change due to be implemented by 1st December 2023.

The October Cabinet report also highlighted a series of other improvement activities, all of which are now well underway:

- A Housing Capital Programme in place for 2023/24 and an outline programme developed for 2024/25. After the transfer has been completed a 3-5 year investment plan will be developed.
- The development of a balanced robust 30-year HRA Business Plan, which sets investment plans to management and maintain council housing stock in the context of capital funding levels, treasury management and borrowing capacity is complete and shows that with the current profiles and economic assumptions, the HRA can:
    - Deliver the programme of major works as profiled;
    - Repay existing loans as they fall due; and
    - Borrow when required to fund the profile of the major works but can afford the interest payments.
- Business plan assumptions will be revisited in January 2024 as part of annual budget and rent setting process.
- An income maximisation action plan to improve rent collection rates and support to tenants is completed. There is a month on month increase in collection figures which is encouraging. Collaborative working between Six Town Housing, the Council, Citizens Advice Bureau and the Department for Work and Pensions is strengthening this and linking firmly to the Anti-Poverty Strategy.
- A service review of day-to-day repairs and maintenance is in progress to establish service targets and cost and performance data is underway and progress is now reported weekly.
- Work on the assets and liabilities register has been completed to ensure a comprehensive understanding.

1.2 Contracting and Compliance

Over the summer the Council was notified of some serious breaches of the Management Agreement by the interim Chief Executive of Six Town Housing, who commissioned a contracting and compliance review. Over 4,000 outstanding actions were highlighted against a number of tenancy management standards and fire risk assessments. The serious and sustained breaches of agreed Key Performance Indicators was not acceptable and therefore, in accordance with the Management Agreement, an urgent improvement plan was requested.

The Improvement Plan submitted to the Council provides assurance that all severe actions are responded to as soon as they are identified by the surveying team and that all outstanding serious actions, rated as Category 1 and Category 2 will be resolved by the end of this financial year. No tenants have sustained, or are at risk of sustaining, "serious harm". Following receipt of the Improvement Plan, agreed weekly reporting in relation to compliance issues is now in place.

Day to day management of these actions is now being supported by the Council's Executive Director of Operations in readiness for transfer. A full stock condition survey will also be completed by March 2024.

1.3 Return of Six Town Housing Services to direct Council control

It is recommended that a Transfer of Engagement process is approved to transfer Six Town Housing, in whole, into Council Control from 15th January 2024. From this date the Council will assume full responsibility for its functions. The management agreement between the Council and Six Town Housing does not provide for a mutually agreed termination, however the Council and Six Town Housing can agree to a variation to the agreement and jointly agree termination. This document will be prepared and will require the agreement of Six Town Housing's Board. The Board will be dissolved following transfer and accountabilities will be transferred to the Council, led by the Cabinet Member for Housing.

Ahead of the transfer date a programme of change activity will be completed, with external support, including:

- Review of contracts and liabilities currently held by Six Town Housing.
- Option for retention of the Six Town Housing company.
- Review of external SLA arrangements held by Six Town Housing.
- Review of arrangements for stock held outside the HRA.
- Implication for existing funding arrangements.
- Internal and external communications, including tenants and TMO engagement.
- Staff transfer and engagement (including TUPE).
- Notification to the Council Housing Regulator and application of Registered Provider status by the Council.
- Review of financial records/HRA strategy.
- A deed of variation to the Management agreement will need to be agreed by the Council and Six Town Housing Board to terminate the existing management agreement.

1.4 Structure and management arrangements

Transferring responsibility for the management and maintenance of Council Housing to the direct management of Bury Council constitutes a 'service transfer' and, as such, current Six Town Housing staff will need to be supported in accordance with the Transfer of Undertakings (Protection of Employment) (TUPE) regulations.

Subject to agreement of this report, and with the support of Trade Union colleagues (via the Local Government Services Consultation Meeting) Officers will seek to inform and consult staff on the details of the transfer. – The responsibility for consultation rests with the current substantive employer, therefore:

- The Council will consult with affected Council employees on changes to structures and responsibilities. The intention is that this process begin on 13th November 2023 for a period of 30 days.
- The Director of People & Inclusion will confirm the decision made by the Council and will confirm that formal TUPE consultation with Six Town Housing staff is required. Six Town Housing will commence TUPE consultation following the same timeline and the purpose of this will be to inform staff about the proposed transfer.

The consultation with Six Town Housing staff does not relate to the fact that the transfer is happening, but rather is an opportunity to share and seek feedback on any planned changes affecting staff as a result of the transfer.

During the consultation period necessary information will be shared with the Council by Six Town Housing to enable the staff transfer process.

Throughout the consultation process, officers will review the feedback provided to inform the detail of the transfer process with the intention that the transfer takes place on 15th January 2024. An ongoing FAQ document will be maintained by each employer and this will be updated and shared throughout the consultation period by each respective employer.

The intention is that, on the whole, staff will transfer without substantive changes to current organisational structures. However, to ensure alignment with the Council's own organisational design principles and vest leadership responsibility with the relevant Executive Director, functions will move under the relevant Council Department for strategic leadership purposes. In tandem with this, consideration has also been given to leadership of the Council's existing strategic housing functions in the context of the recent departure of the Council's Director of Housing.

In headline terms, this operating model would see housing responsibility distributed across five functional areas.

- **Housing & Neighbourhood Management** activity will be overseen by the Executive Director (Strategy & Transformation) in the Corporate Core Department.
- **Corporate Functions** will also be delivered via the Corporate Core and Finance Departments.
- **Housing Property,** including repairs and maintenance ('Repairs Direct') will form part of the Operations Department in keeping with the position of this department as the Council's delivery vehicle for all non-social care services. (Matrix oversight of the performance of these services as an integral part of Council Housing services will, however, be provided by the new leadership role described below and included in reports to the Cabinet Member).

- Responsibility for **Housing Investment and Asset Management** will remain within the BGI Department and proposals to ensure sufficient capacity here will be brought forward separately.
- The Council's current **Strategic & Statutory Housing** functions (those which were previously overseen by the Director of Housing) will be managed across a number of Council Departments in the first instance, as set out below.

The intention is that a new role will be created to act as the Council's lead officer for its social housing function and act as a single point of contact for the regulator. This role will sit within the Corporate Core, reporting to the Executive Director (Strategy & Transformation). A job description for this role is currently in development and its establishment will be subject to relevant approvals over the coming two months. The former (vacant) Director of Housing post will be disestablished.

The distributed model is designed to ensure sufficient management capacity to drive the scale of improvement required whilst maintaining a discrete identity for the whole of housing services when required. For the vast majority of Six Town Housing staff this will mean no change at all at the point of transfer. However, on day one, line management of the four roles currently reporting to the Six Town Housing Interim Chief Executive will move to the following:

- The Director of Customer Services will report to the Executive Director (Strategy & Transformation). This post is currently vacant and so the two Business Managers who previously reported to this post will be managed directly by the Executive Director pending establishment of the leadership role noted above.
- The Director of Assets will report to the Executive Director (Operations) in the first instance.
- The Director of Finance and Business Assurance will report to the Executive Director (Strategy & Transformation) in the first instance.
- The Business Manager (People & Culture) will report to the Director of People & Inclusion

For Council staff, line management accountabilities for the Director of Housing's former direct reports will be undertaken by appropriate senior leaders in alignment with the above Housing Operating Model described above as an initial measure pending a review of roles and accountabilities.

The transfer approach and alignment of Council functions noted above is proposed in order to ensure a continued focus on the ongoing improvement journey and allow time for Council leaders to better understand the detail of service prior to any further change. Dedicated HR resources will be retained to progress a full programme of service reviews across both new and existing housing functions across 2024 and to identify and action areas for improvement and efficiency.

It should be recognised that the Council's budget savings include a total of £1.5m in savings linked to this area across the 23/24, 24/25 and 25/26 financial years. The first tranche of these savings has been progressed through a review of current Service Level Agreements and the changes to the Support at Home Service previously agreed by Cabinet. Further efficiencies will be supported through this

review process whilst recognising the critical importance of ensuring effective delivery capacity to support Council tenants.

In accordance with TUPE regulations staff terms and conditions of employment will be protected and cannot be changed simply because of the transfer. Former Six Town Housing staff will be managed in accordance with these terms following their move to Council employment. Where there is an 'Economic, Technical or Organisational' (ETO) requirement for change this can be proposed as a potential 'measure' through the consultation process. - The Council is not seeking any such 'measure' through this process.

Whilst not contractual terms and hence not TUPE Measures it is worth noting three areas which the Council will be seeking to confirm during the consultation process:

1. In-line with Council employees, Six Town staff would be 'opted in' to an additional 3 days of unpaid leave per year, with the option to opt-out if they wish to do so

2. Six Town staff will be given access to the Council's town-centre discounted car parking scheme. Paid-for-parking will only be provided when demonstrated as essential for business delivery

3. Six Town Housing introduced 'lifestyle contracts' for a number of their staff as part of the organisation's post-covid arrangements. Lifestyle contracts set out a range of flexible and agile working arrangements but are not part of the employment contract. However, in some cases the 'agile working' component of these documents has been reflected as a contractual change. The detail of this approach broadly aligns with the model already in place for Council staff and includes an emphasis on work location being driven by service need (i.e. staff are not 'home workers'). The Six Town definition of an agile worker is set out below.

   "…This may include from home/any other suitable location, provided always that you comply with your line managers requests to return to the office, having been provided with reasonable notice. You may be requested to return to the office for specific meetings or events, or for a specific period of time by reason of operational and business need."

During the consultation period and throughout and beyond the transfer process there will be a strong focus on workforce engagement and support. A detailed 'employee offer' document has been created which describes the benefits of Council employment to Six Town Housing staff and a range of engagement interventions are in development across the different components of the Six Town Workforce. This will be crucial in ensuring current Six Town Staff feel supported and enabled to continue to deliver for the people of Bury.

1.5 Continuous Improvement

The urgent nature of the transfer means that all staffing, systems, assets and liabilities will transfer on 15 January 2024 "as is", including the Six Town Housing brand.

Pending transfer, weekly updates on property compliance activity and the Stock condition survey work will be provided to the Council.

A more fundamental programme of transformation activity will be progressed post transfer, allied to the new Regulator of Social Housing standards. A self-assessment of Six Town Housing services against new regulator requirements is being produced to inform service development plans. The project management requirements for undertaking this review and the implementation of any news ways of working are currently being scoped and proposals to ensure sufficient capacity to undertake this work will be brought forward separately.

1.6 Monitoring and Review

Post transfer performance management of Six Town Housing services will be the responsibility of the Executive Directors proposed and their associated Cabinet portfolios, under the overall direction of the Cabinet Member for Housing Services.

It is proposed that housing services are incorporated within the Scrutiny work plan from the new municipal year and that this will overtake the current Partnership Board which will cease meeting from the point of transfer. In order to ensure that the Tenants voice is centre to the management of the housing stock a Tenants advisory Board will be established this will be constituted under s.102(4) of the Local Government Act 1972 to advise the Executive on relevant matters relating to the former ALMO services and issues relevant to the housing service. The Members appointed to the Board could all be selected from across Bury and it would also include Cabinet Member for housing.

2.0 Recommendations

Recommendations are listed on the front of this report.

Links with the Corporate Priorities:

An integrated approach to the management of council housing for tenants will help realise the Let's do it Strategy of public service reform and the Housing Strategy objectives of safe, high quality and mixed tenure housing offer.

Successful delivery of these strategies relies upon new localised arrangements which draw upon the strengths of local communities and reflect the distinct identities of the six towns which make up the borough.

Equality Impact and Considerations:

Inclusion and equity must be at the heart of the Council's approach to the management and maintenance of its housing. An EIA was provided to support the recommendation to return the housing stock to direct Council control.

Environmental Impact and Considerations:

The model for management and maintenance of council housing contributes to the achievement of a carbon neutral Borough by 2038. STH has made progress in establishing approaches and pilot schemes. Investment through the Housing Capital Programme to modernise and refurbish council housing provides the opportunity to enhance delivery and be cost effective within a fully scaled Council-wide programme.

Assessment and Mitigation of Risk:

Risk / opportunity	Mitigation
Implementation of the agreed vision and service models	Communications Plan, Stakeholder engagement
Financial sustainability of the Housing Revenue Account – PEST environment – within the context of the Council's Financial pressures	Financial capacity Inflation, cost controls Development of a robust HRA Business Plan
Operating within the Regulatory environment	Effective regulatory preparation. Performance management & continuation of the improvement journey

Legal Implications:

The Management agreement between the Council and Six Town Housing does not allow for mutual termination of the agreement. An agreed deed of variation will be required.

Significant work is required to ensure that legal liabilities are reviewed prior to transfer to the Council. All staffing matters will be dealt with in line with TUPE legislation. Legal advice and support will be provided throughout.

Financial Implications:

The Council's budget savings include a total of £1.5m in savings linked to this area across the 23/24, 24/25 and 25/26 financial years. The first tranche of these savings has been progressed through a review of current Service Level Agreements and the changes to the Support at Home Service previously agreed by Cabinet.

The return of Six Town Housing to the direct control of the Council and all of its assets, liabilities and stock is a significant piece of work for the finance team. However, the development of the HRA business plan that has been undertaken this financial year is a significant improvement on the previous information that was available.

Appendix:
EIA – To follow

Background papers:
Cabinet report – Strategic Housing Review June 2023
https://councildecisions.bury.gov.uk/documents/s35772/Strategic%20Housing%20Review.pdf

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

Term	Meaning
Six Town Housing	Bury Council's Arm's Length Management Organisation
Housing Revenue Account (HRA)	Ring fenced Account for the provision of housing management and maintenance of council housing

Agenda Item 14

MINUTES OF THE MEETING OF THE GREATER MANCHESTER COMBINED AUTHORITY HELD ON FRIDAY 29TH SEPTEMBER 2023 AT THE BANQUETING SUITE, LEIGH SPORTS VILLAGE

PRESENT

Mayor of Greater Manchester	Andy Burnham (in the Chair)
Deputy Mayor (Police, Crime & Fire)	Kate Green
Bolton	Councillor Nicholas Peel
Bury	Councillor Eamonn O'Brien
Oldham	Councillor Arooj Shah
Manchester	Councillor Bev Craig
Rochdale	Councillor Neil Emmott
Stockport	Councillor Mark Roberts
Tameside	Councillor Ged Cooney
Trafford	Councillor Tom Ross
Wigan	Councillor David Molyneux

ALSO IN ATTENDANCE:

Bolton	Councillor Nadim Muslim
Rochdale	Councillor Janet Emsley
Salford	Councillor John Merry

OFFICERS IN ATTENDANCE:

Chief Executive Officer, GMCA & TfGM	Eamonn Boylan
GMCA Deputy Chief Executive	Andrew Lightfoot
GMCA Exec Director of Policy & Strategy	Simon Nokes
GMCA Monitoring Officer	Gillian Duckworth
GMCA Treasurer	Steve Wilson
GMCA Director of Governance & Scrutiny	Julie Connor
GMFRS Chief Fire Officer	Dave Russel

GMFRS Deputy Chief Fire Officer	Ben Norman
Bolton	Sue Johnson
Bury	Lynne Ridsdale
Manchester	James Binks
Oldham	Harry Catherall
Rochdale	Steve Rumbelow
Salford	Tom Stannard
Stockport	Caroline Simpson
Tameside	Sandra Stewart
Trafford	Sara Todd
Wigan	Alison McKenzie-Folan
Office of the GM Mayor	Kevin Lee
GMCA	Sylvia Welsh
GMCA	Lee Teasdale
NHS	Claire Norman

GMCA 160/23 APOLOGIES

That apologies be received and noted from City Mayor Paul Dennett (Salford), Councillor Mark Hunter (Stockport) & Joanne Roney (Manchester).

GMCA 161/23 CHAIRS ANNOUCEMENTS AND URGENT BUSINESS

The Mayor of Greater Manchester, Andy Burnham, provided an update following the launch of Tranche 1 of the Bee Network on Sunday 24th September. The launch had been successful, with an enormous programme of work having taken place at the depots on the Saturday night to transfer over the IT systems, radios, and branding. Tribute was paid to the Transport for Greater Manchester (TfGM) officers who had worked on the changeover led byChief Executive Officer, GMCA & TfGM Eamonn Boylan. Thanks were also given to Diamond and Go North West who had worked closely with TfGM during the transition. It was also advised that the new app and

ticketing options were now available, effectively introducing 20% savings across the entire region.

Members welcomed the scope that would now be opened up to allow residents to work with their councillors to suggest and propose bus routes that worked best for them through their local respective Bee Network structures.

The Mayor of Greater Manchester, Andy Burnham, provided an update on the current issues around the potential cancellation of the Manchester-Birmingham arm of High Speed 2 (HS2). The loss of HS2 to Manchester would be hugely detrimental to the region, not only impacting strong north to south connectivity, but also the viability of strong west to east lines across the north. The Mayor , together with Cllr Bev Craig, have written to the Prime Minister asking for an audience with him during the Conservative Conference in Manchester to seek further clarity on the decision being taken and the reasons for it.

Deputy Mayor, Kate Green, was invited to provide an update on the ongoing Baird Review. The review had been commissioned over the summer following the reporting by Sky News of a number of serious allegations made by three women whilst in Greater Manchester Police (GMP) custody suites. Dame Vera Baird was in the process of investigating the circumstances of the cases and the way in which wider lessons needed to be learned about the treatment of women and girls , when in police custody. It was advised that prior to the review an improvement programme had already commenced across the estate of GMP custody suites following recommendations made by a HM Chief Inspectors report earlier in the year. It was expected that a follow up visit would be made towards the end of 2023.

Dame Baird had met with a number of people who had sought to share their experiences of GM custody, including some of the women who had shared their stories in the media, and remained on track to produce her report towards the end of the year. However, there was still a window of opportunity for anyone who wished to share their experiences of custody to come forward, and it was asked that they do so within the next two weeks.

RESOLVED /-

1. That the update following the introduction of Tranche 1 of the Bee Network on Sunday 24th September 2023 be received.

2. That the update on the current issues around HS2 be received.

3. That it be noted that the Mayor was seeking an audience with the Prime Minister to gain further clarity on the HS2 line to Manchester proposals.

4. That the Deputy Mayor's update on the ongoing Baird Review be noted.

5. That it be requested that any persons who wished to engage with the Baird Review and had not already done so, to make contact within the next two weeks.

GMCA 162/23 GMFRS FIRE COVER REVIEW

Deputy Mayor, Kate Green, together with Chief Fire Officer (CFO) Dave Russel and Deputy CFO Ben Norman were to provide the outcomes of the recent Greater Manchester Fire & Rescue Service (GMFRS) Fire Cover Review.

The review had taken place as required by His Majesty's Inspectorate of Constabulary and Fire & Rescue Services (HMICFRS) every four years, to ensure that the fire resources currently in place were as best matched to the requirements of the city region as possible.Ensuring that the right equipment was in the right place at the right time, with a recognition that the areas of most demand did shift over time.

The public and staff consultation process had commenced on 5th June for a period of 11 weeks, and it had been made clear from the outset that this was a truly engaged process that sought to listen to the voices of colleagues and local communities. In excess of 830 responses had been received throughout the process, and the wider engagement process had also involved attendance at local scrutiny meetings, sessions with local MPs and councillors, and in-person local events held in the areas

at most risk of day crewing systems being introduced. The headline outcomes following the consultation exercise were detailed as follows:

- Introduce additional wholetime fire engine at Manchester Central Community Fire Station – taking the total fleet from 50 to 51 pumps.
- Invest an additional £340k in Prevention and Protection activities – targeting more resources to keeping people safe from emergencies before they happen.
- Implement Enhanced Rescue Station proposals at Leigh and Ashton Community Fire Stations – strengthening the ability to respond to increasing numbers of complex emergencies.
- Implement all proposals from the Strategic Review of Special Appliances – Implementing new technologies and ensuring specialist technical equipment is best located for where it is most needed across the city-region.
- Crews will continue to be based on station 24/7 and day crewing arrangements will not be progressed at Sale and Offerton fire stations.

Chief Fire Officer, Dave Russel, stated that the results of the review represented a very positive outcome for GMFRS and the communities it served. The Service will be stronger and more resilient as a result of these changes.

Thanks were expressed to CFO Dave Russel, DCFO, Ben Norman, and all staff at GMFRS who had been involved in the review and brought it to a successful conclusion.

RESOLVED /-

1. That the GMCA notes that the GMFRS Fire Cover Review outcomes constitute a Mayoral Decision.

2. That the verbal update on outcomes of the GMFRS Fire Cover Review be received and noted. With the proposals highlighted as follows:
   - Introduce additional wholetime fire engine at Manchester Central Community Fire Station – taking the total fleet from 50 to 51 pumps.

- Invest an additional £340k in Prevention and Protection activities – targeting more resources to keeping people safe from emergencies before they happen.
- Implement Enhanced Rescue Station proposals at Leigh and Ashton Community Fire Stations – strengthening the ability to respond to increasing numbers of complex emergencies.
- Implement all proposals from the Strategic Review of Special Appliances – Implementing new technologies and ensuring specialist technical equipment is best located for where it is most needed across the city-region.
- Crews will continue to be based on station 24/7 and day crewing arrangements will not be progressed at Sale and Offerton fire stations.

GMCA 163/23 DECLARATIONS OF INTEREST

RESOLVED /-

That there were no declarations of interest made in relation to any item on the agenda.

GMCA 164/23 MINUTES OF THE GMCA MEETING HELD ON 28 JULY 2023

RESOLVED /-

That the minutes of the GMCA meeting held on 28 July 2023 be approved as a correct record.

GMCA 165/23 MINUTES OF THE GMCA RESOURCES COMMITTEE MEETING HELD ON 28 JULY 2023

RESOLVED /-

That the minutes of the GMCA Resources Committee meeting held on 28 July 2023 be approved as a correct record.

GMCA 166/23 MINUTES OF THE GMCA AUDIT COMMITTEE MEETING HELD ON 20 SEPTEMBER 2023

RESOLVED /-

That the minutes of the GMCA Audit Committee meeting held on 20 September 2023 be noted.

GMCA 167/23 MINUTES OF THE GMCA OVERVIEW AND SCRUTINY COMMITTEE MEETINGS HELD ON 26 JULY & 16 AUGUST 2023

RESOLVED /-

1. That the minutes of the GMCA Overview & Scrutiny Committee meetings held on 26 July & 16 August 2023 be noted.

2. That it be noted that as part of the Trailblazer Devolution Deal, parallel scrutiny arrangements with members of parliament were being finalised, and that work would take place to ensure that these arrangements compliment the work of the existing GMCA Overview and Scrutiny Committee.

GMCA 168/23 MINUTES OF THE GREATER MANCHESTER BUSINESS BOARD MEETINGS HELD ON 19 JULY & 19 SEPTEMBER 2023

RESOLVED /-

That the minutes of the Greater Manchester Business Board meetings held on 19 July & 19 September 2023 be noted.

GMCA 169/23 MINUTES OF THE BEE NETWORK COMMITTEE HELD ON 27 JULY 2023

RESOLVED /-

That the minutes of the Bee Network Committee meeting held on 27 July 2023 be noted.

GMCA 170/23 APPOINTMENTS TO GREATER MANCHESTER BODIES

RESOLVED /-

1. That the appointment of Councillor Imran Rizvi (Bury) as a member of the GMCA Overview & Scrutiny Committee be approved.

2. That the appointment of Councillor Nathan Boroda (Bury) and Counicllor Mohammed Iqbal (Bolton) as substitute members of the GMCA Overview & Scrutiny Committee be approved.

3. That the appointment of Councillor Elliot Moss (Bury) to the GM Joint Clean Air Scrutiny Committee be noted.

GMCA 171/23 COST OF LIVING AND ECONOMIC RESILIENCE

Councillor Bev Craig, Portfolio Lead for Economy & Business, and Councillor Arooj Shah, Portfolio Lead for Equalities & Communities, were invited to provide an update on the cost-of-living pressures faced by residents and businesses in Greater Manchester, and some of the measures being put in place by the GMCA and partners to respond to this as another winter period approached.

In terms of the business community, uncertainty remained high. Whilst improvements were gradually being seen in inflation, this had yet to transfer over in terms borrowing or elements such as energy and staffing costs. However, there was positivity that the worst-case scenarios posited last year in terms of redundancies and bankruptcies had largely been averted. Thanks were recorded to the Growth Company for the work they had been undertaking with businesses in the region throughout this period. There were concerns that businesses were having to expand mental health support for staff and adapting food offers during shifts due to the inability of staff to access good quality food elsewhere.

Headlines from the latest residents' survey and the cost-of-living dashboard were detailed. The survey had found that seven in every ten residents were still suffering significantly from the cost-of-living crisis. ONS data had also shown that Greater Manchester residents were suffering the impacts of the crisis more acutely than other areas of the country with 1 in 3 feeling acute financial pressure compared to 1 in 4 across the country as a whole.

The importance of costs coming down was emphasised. Stopping inflation rising would not solve the crisis, as people were already well past the point where everyday goods and services were affordable, and wages were not rising in line with these increased costs.

RESOLVED /-

That the latest assessment and emerging response be noted.

GMCA 172/23 GREATER MANCHESTER EQUALITY PANELS ANNUAL REPORT

Councillor Arooj Shah, Portfolio Lead for Equalities & Communities, presented a report that summarised the activity and impact of the Greater Manchester Equality Panels through their individual Annual Reports 2022-23.

The great work of the Panels and how they positively impacted dialogue was highlighted. It was noted, however, that as these Panels were non-statutory and advisory without direct decision-making powers, the vital role of portfolio leads

continued to interact with these Panels in a genuine way to ensure that their advice was meaningfully implemented.

RESOLVED /-

1. That the Annual Reports provided by the Disabled People's Panel, Youth Combined Authority, Women and Girls Equality Panel, Race Equality Panel, Faith and Belief Panel Advisory Panel, Older Peoples Equality Panel and LGBTQ+ Equality Panel be noted.

2. That the commitment of all Portfolios to proactively engage with Equality Panels (individually or collectively) on issues that impact communities-of-identity be endorsed.

GMCA 173/23 TOWARDS AN INTEGRATED TECHNICAL EDUCATION, SKILLS AND WORK CITY-REGION

Councillor Eamonn O'Brien, Portfolio Lead for Technical Education, Skills and Work, presented a report setting out the ambition of a Technical Education, Skills & Work (ESW) city region within the wider proposed Governance structure to take forward the whole ESW agenda and devolution trailblazer.

The vision for the ESW was to give residents in the city region (particularly younger people) clarity, quality and equality of choice as they proceeded through the education system. The current system was clearly weighted towards the academic route through education, and the ESW sought to lift the value of technical education routes into work and see it placed on a level footing.

It was emphasised that this was not about discouraging young people from entering university, but instead about ensuring choice and the broadening of opportunities available to as wide a set of people as possible. This would initially be enabled through the Manchester Baccalaureate which would provide a clearly defined pathway for a post-16 technical route.

The delivery of this system would require appropriate governance, and the report outlined how the existing governance would be stepped down and replaced by an employer led governance system rooted in the needs of the Greater Manchester economy. It was requested that all districts encourage local businesses to engage with the boards being inaugurated to ensure that the governance was as meaningful and impactful as possible. There would also be a series of thematic boards looking at what truly embodied good skills and fair & accessible employment. Standing at the top of the governance system would be a Joint Oversight Board, this would be the Board through which the GMCA would partner with relevant government partners to deliver the necessary change.

Recent polling had shown 60% support for the Manchester Baccalaureate plans amongst the Greater Manchester public, which was a huge indication of the willingness to embrace this new approach.

RESOLVED /-

1. That the update and proposed next steps be noted and endorsed.

2. That the proposals for new governance arrangements for GMCA's Education, Skills and Work portfolio, including the development of the Joint Oversight Board (JOB) with central government, in line with the Trailblazer Devolution Deal, and the proposed operation of a 'shadow' JOB ahead of full implementation in early 2024, be approved.

3. That the standing down of current Employment Skills and Work (ESW) governance be approved – primarily the Employment & Skills Advisory Panel (ESAP), with thanks for members' contributions to date.

4. That the establishment of a GMCA ESW Executive Member portfolio leads' forum, comprising the ten portfolio leads (e.g. Work & Skills or equivalent) be approved, with Leaders invited to nominate their relevant Executive Member portfolio lead.

5. That the progress of the Local Skills Improvement Fund (LSIF) application and delegate initial sign off for the submission to the Portfolio Leader for Technical Education, Skills & Work be noted.

6. That all individual districts be requested to engage with their local businesses to encourage involvement with the new ESW governance arrangements.

GMCA 174/23 PUBLIC SWITCHED TELEPHONE NETWORK (PSTN) SWITCHOVER

Councillor Nick Peel, Portfolio Lead for Digital, presented a report that highlighted changes in the UK telecoms infrastructure that would impact a significant number of people and organisations across the city region.

The network was due to be switched off and an internet connection would be needed to run any landline telephone number. This would inversely affect older people in the region and there was significant concern that the impact of this changeover was not yet being appropriately disseminated through communications and media channels., therefore furthering the risk of isolation and being ‘left behind’.

An issue with the communications element, was that the government had asked that this be an industry led switchover, and whilst people were receiving calls offering them a free switchover, many people were understandably believing these to be scam callers.

The report recommended that the government be requested to take more of a coordinating role, particularly in terms of awareness and public relations, and that they also help housing providers with the capital they will need to provide new equipment. A working group would be established within Greater Manchester to help with locally led interventions.

RESOLVED /-

1. That the report and progress towards supporting PSTN switchover in GM be noted.

2. That support be given to advocating that the Government should play a stronger and more active role in the PSTN switchover.

3. That the need to ensure that public sector organisations and their partners were undertaking appropriate steps to upgrade or mitigate be endorsed.

4. That the work between local authorities and industry to identify vulnerable households and the request that no-one is disconnected by industry until a suitable alternative connection is available be supported.

5. That the establishment of a GM PSTN Switchover working group to coordinate activity and communication, in partnership with ISPs and Local Authorities be endorsed.

GMCA 175/23 BUSINESS PLAN FOR THE INTEGRATED WATER MANAGEMENT PLAN TO 31 MARCH 2024

Mayor of Greater Manchester, Andy Burnham, and Councillor Tom Ross, Portfolio Lead for Green City Region, presented a report seeking approval for the Business Plan for the Integrated Water Management Plan (IWMP) to 31 March 2024 and the resources required to enable the plan to be progressed and delivered.

The Plan had been agreed at the June 2023 meeting of the GMCA, and since then a Round Table had taken place on the delivery of the Plan. The resource request, which would match the commitment of the Environment Agency and United Utilities, was for a Project Lead, an Analyst, Support Officer and a Graduate position.

Councillor Nadim Muslim, the Chair of the GMCA Overview & Scrutiny Committee, was invited to provide feedback following the Committee's receipt of a further update on the Integrated Water Management Business Plan, and had made the following highlighted recommendations:

- That the GMCA and all its constituent councils and TfGM use every opportunity to increase awareness through consistent messaging to residents about the

need for behavioural change to prepare for the increased levels of water predicted, and that there are strong communication campaigns aligned with national announcements, such as the latest surface water data expected to be published in 2024

- That although the issue crosses multiple portfolio areas, the need for a political lead is evident in order to keep the momentum, alongside further developed governance arrangements
- That the current measures of success be considered by the Partnership as part of the Greater Manchester Strategy Refresh next year, to determine whether we are in fact measuring the right metrics
- That each of our Local Authorities continue to look for ways to engage effectively with this Plan in order to influence changes to development planning processes and aid the introduction of Schedule 3 where consideration regarding sustainable urban drainage become mandatory for every infrastructure development

It was advised that a session of the Integrated Water Management Plan would be taking place during the Green Summit on Monday 2nd October.

RESOLVED /-

1. That the Business Plan for the Integrated Water Management Plan to 31 March 2024 (Annex A) be approved.

2. That the budget request this financial year (£207,758) to operationalize the plan (paragraph 3.5) be approved.

3. That the request to create new fixed terms posted funded through retained business rates (paragraph 3.2) be approved.

4. That the allocation of a minimum of £250k is allocated to the Integrated Water Management Plan from FY 24/25 retained business rates (Paragraph 3.6) be approved.

5. That the comments raised by the GMCA Overview & Scrutiny Committee be received and noted.

6. That it be noted that an Integrated Water Management session would be held during the GM Green Summit on Monday 2nd October.

GMCA 176/23 DELIVERING THE BEE NETWORK: ACQUISITION OF BUS DEPOTS TO SUPPORT BUS FRANCHISING

Mayor of Greater Manchester, Andy Burnham, provided an update on the acquisition of Bus Depots to support Bus Franchising and sought authorisation for procedural changes in the acquisition of the bus depots required to support Tranches 2 and 3 of the GM Bus Franchising Scheme.

RESOLVED /-

1. That the procedural changes for depot acquisitions for Tranches 2 and 3, in order to streamline the acquisition and leasing of depots, be approved.

2. That the changes to the decisions and delegations from the September 2022 GMCA meeting, set out in the Appendix, be noted.

3. That authority be delegated to the Chief Executive Officer, TfGM and GMCA, to agree the final terms of leases of bus depots both in respect of interim leaseback arrangements to existing operators and the franchise depot leases to be granted to the franchise bus operators for Tranches 2 and 3.

4. That authority be delegated to TfGM to manage, maintain and insure all of the bus depots on behalf of GMCA in accordance with the terms of an agreed Protocol between GMCA and TfGM referred to in earlier reports to the GMCA.

5. That authority be delegated to the GMCA Treasurer to agree the terms of any agreement between the GMCA and TfGM to bring Tranche 1 leases in line with Tranches 2 and 3.

GMCA 177/23 ANNUAL TREASURY OUTTURN REPORT

Councillor David Molyneux, Portfolio Lead for Investment & Resources, presented the Annual Treasury Outturn Report 2022/23 as required by regulations issued under the Local Government Act 2003.

RESOLVED /-

That the report be approved.

GMCA 178/23 GREATER MANCHESTER BROWNFIELD PROGRAMME

Councillor Ged Cooney, Portfolio Lead for Housing, presented a report setting out details of further allocations of funding from the Greater Manchester Brownfield programme which were approved during August and September under the delegation agreed by the Combined Authority in July.

RESOLVED /-

1. That the allocation of up to £14.9m of the Brownfield Housing Fund programme funding devolved to GMCA to the 7 projects identified at Appendix 1,be noted.
2. That authority be delegated to the Chief Executive Officer, GMCA & TfGM, acting in consultation with the Portfolio Lead for Housing and the Lead Member of the relevant district to approve increases of up to 10% on brownfield funding allocations previously approved by the Combined Authority and other variations to funding conditions in the period up to 31 March 2024.

GMCA 179/23 GREATER MANCHESTER CITY DEAL RECEIPTS – INVESTMENT APPROVAL RECOMMENDATION

Councillor Ged Cooney, Portfolio Lead for Housing, presented a report seeking approval to the investment of City Deal Receipts into two social impact funds to aid in delivering the GM Housing objectives.

RESOLVED /-

1. That the following investments of City Deal Receipts in two Social Impact Funds, be approved as follows:

FUND	DISTRICT	CDR INVESTMENT
National Homelessness Property Fund 2	GM Wide	£6.5m
Resonance Supported Homes Fund	GM Wide	£2.5m

2. That the City Deal Receipts. which form part of the £119.8m GMCA was lending to Renaker's Bankside and Trinity D2 developments being increased from £20m to £21m, with the GM Housing Investment Loans Fund ("GMHILF") element of the loan reduced accordingly, be approved.

3. That authority be delegated to the GMCA Treasurer and GMCA Solicitor & Monitoring Officer to review the due diligence information in respect of the above loan, and, subject to their satisfactory review and agreement of the due diligence information and the overall detailed commercial terms of the loan, to sign off any outstanding conditions, issue final approvals and complete any necessary related documentation in respect of the loan noted above.

GMCA 180/23 GREATER MANCHESTER INVESTMENT FRAMEWORK CONDITIONAL PROJECT APPROVAL

Councillor David Molyneux, Portfolio Lead for Resources & Investment, presented a report seeking approval for a loan to ClearCycle Ltd and advised that an investment into LoveRaw Limited had been approved under delegation and was being reported to the GMCA for information.

RESOLVED /-

1. That the loan facility of up to £950,000 to ClearCycle be approved.

2. That the investment into LoveRaw Limited (“LoveRaw”) of £500,000, approved under delegated authority be noted.

3. That authority be delegated to the GMCA Treasurer and GMCA Solicitor & Monitoring Officer to review the due diligence information in respect of the above loan, and, subject to their satisfactory review and agreement of the due diligence information and the overall detailed commercial terms of the loan, to sign off any outstanding conditions, issue final approvals and complete any necessary related documentation in respect of the loan noted above.

GMCA 181/23 EXCLUSION OF THE PRESS AND PUBLIC

That, under section 100 (A)(4) of the Local Government Act 1972 the press and public should be excluded from the meeting for the following items on business on the grounds that this involved the likely disclosure of exempt information, as set out in the relevant paragraphs of Part 1, Schedule 12A of the Local Government Act 1972 and that the public interest in maintaining the exemption outweighed the public interest in disclosing the information.

GMCA 182/23 GREATER MANCHESTER INVESTMENT FRAMEWORK CONDITIONAL PROJECT APPROVAL

Clerk’s Note: This item was considered in support of the report considered in Part A of the agenda (minute 180/23)

RESOLVED /-

That the report be noted.

By virtue of paragraph(s) 3 of Part 1 of Schedule 12A
of the Local Government Act 1972.

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of the Local Government Act 1972.

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